NIRS TRAINING

Adding Activities:

From the dashboard, hover the cursor over "Activities" and click on "Add Activity." You will then select the Activity CORE Function using the definitions below.

Most Common CORE Functions used at IDS:

Other Direct/Model Services: Specialized non-clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions.

Examples Include:
Training or educating individuals with developmental disabilities and their family members.
Providing therapeutic child care, or other direct services to individuals with a developmental disability and their family members.
Providing technical assistance directly to individuals with developmental disabilities and their family.
Conducting research that includes a direct service component or intervention with individuals with developmental disabilities and their family members as subjects.
Supervising professionals, para-professionals, or students who are providing direct services to individuals with developmental disabilities and their family members.

Technical Assistance: Direct problem-solving services provided by UCEDD faculty/staff to assist programs, agencies, or other entities in improving their outcomes, services, management, and/or policies. This includes TA provided to self-advocacy organizations, family support groups, and other organizations. Examples of improvements include, but are not limited to:

- Enhanced resources
- Enhanced services
- Strengthened networking of public and private entities across communities
- Increased awareness of evidence-based practices
- Enhanced capacity to assess current practices in relation to evidence-based approaches
- Identification of policy changes needed within the area of emphasis

Product Development and Information Dissemination: Distribution of knowledge-based information through developed products and activities.

Continuing Education: Seminar(s) or courses of instruction offered by a UCEDD that: (1) serve to maintain professional credentials; (2) encourage professionals to expand their knowledge base and stay up-to-date on new developments; and (3) offer certificates of completion or CEUs (or their equivalents).

Training: Training provided by UCEDD faculty/staff to enhance knowledge of a variety of community members (individuals with developmental and other disabilities, their families, professionals, paraprofessionals, policy-makers, students or others in the community).

Activities will be categorized as Continuing Education or Community Training based on the response to the question "Are continuing education credits offered?" which already exists in NIRS:

- Yes = Continuing Education
- No = Community Training

Direct Clinical Services/Model Services: (PEDS) Specialized clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions. This includes direct problem-solving services to assist individuals with developmental and other disabilities and their families. Examples may include, but are not limited to: an autism screening and diagnostic clinic, or direct clinical services such as PT, OT, or SLT.

Other CORE Functions:

Demonstration Services: This is rarely used. Services that field test promising or exemplary practices and may be integrated with training, research, and/or dissemination functions.

Interdisciplinary Preservice Preparation Training Trainees: Instructional program offered by the UCEDD that: (1) integrates knowledge and methods from two or more distinct disciplines; (2) integrates direct contributions to the field made by people with disabilities and family members; (3) examines and advances professional practice, scholarship and policy that impacts the lives of people with developmental and other disabilities and their families; (4) is designed to advance an individual's academic or professional credentials; and (5) takes place in an academic setting or program.

It may: (1) lead to the award of an initial academic degree, professional certificate, or advanced academic credential; and (2) contribute to a discipline-specific course of study offered by the UCEDD or by another academic department.

Performing Research or Evaluation: Implementation of basic and applied research, program evaluation, and analysis of public policy on issues impacting individuals with developmental disabilities.

TITLE OF ACTIVITY

Enter name of project, description of activity (other information such as time period covered can be added).

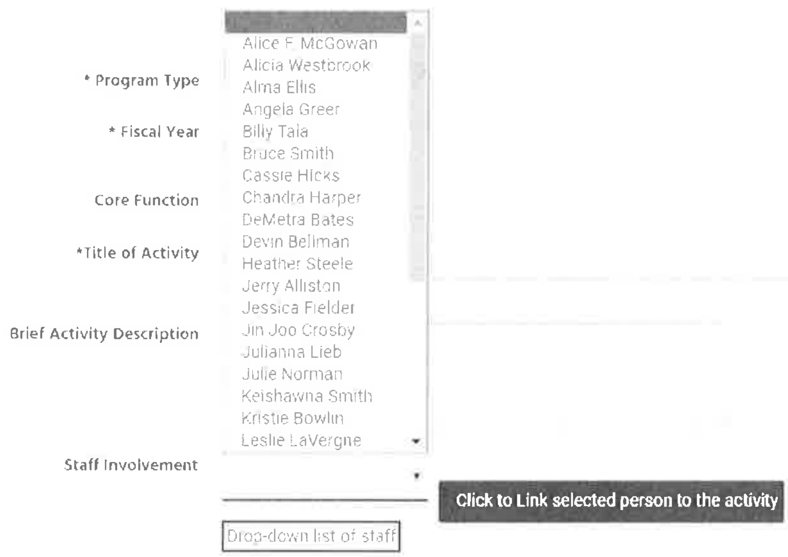
Example:
F2F - Development/Dissemination of Family Health Notes Listserv (Jul. 1, 2018 - June 30, 2019)
TCS - Strategic Planning Meeting (Oct. 2, 2018)

Brief Activity Description

Enter any information that is pertinent to the activity

Staff Involvement

Select your name from the drop down list and click "Click to link selected person." Then select each individual who was involved with the activity and "Click to link selected person." Repeat this step until all IDS staff involved is added.



Type of Activity:

- Advocacy: active support for a program, initiative, or change.
- Capacity Building: (most commonly used) strengthening local, state, regional, and national communities.
- Systemic Change: modifying entire programs, policies, services, and/or funding streams.

Area of Emphasis:

The area of emphasis should match the current IDS emphasis areas:

- Early Childhood Inclusion and Education (Education & early intervention)
- Housing
- Transition to Adulthood (Employment or Leadership)
- Wellness (Health, Assistive Technology or Recreation)

Agencies Collaborating on the Work of the Activity:

If no agency is directly collaborating select Not applicable. If another agency is directly involved select the box by all that apply and type the name of the agency on the line provided.

Primary Affiliated Project:

Select the name of the project associated with the activity form the drop down list. If there is a secondary activity select it also.

Duration:

Is the number of hours you spent completing the project. A 4 hour training equals 4 hour duration.

Date of Activity:

This is the date the activity to place or if multiple days the day it began.

Enter other data as applicable

Click Save

ADDING PRODUCTS

From the dashboard, hover the cursor over "Products" and click on "Add Product." You will then select "add" beside the Product/Publication Type that best matches your product. For more information click (read definition) beside each option.

Enter:

- Title
- Author from drop down list and click add person. Repeat for each person who is an author.
- Date of Publication
- Type
- Target Audience
- Product Dissemination click check box
- Enter contact info for person responsible for disseminating
- Brief description
- Alternative formats: select all that are available
- Cost: if charging enter cost to order if not enter $0.00
- Name: Name of person to contact to order

Example:

ystem

Projects | Activities | Products | Goals | Directory | Admin

--New Material Type--

Program Type	UCEDD
Product ID	151039
Type of Material	Electronic Products
Fiscal Year	2019
Title	F2F - Family Health Notes Listserv (October 2018)
Date the product was developed	10/2018
Author(s)	Leslie LaVergne; Keishawna Smith; Jerry Alliston
To Obtain Copies (URL or Email)	http://ids-familytofamily.blogspot.com/
Publisher	0
Brief Description	Monthly listserv for F2F project - 608 subscribers
Alternative Formats	Electronic (disc, CD, 508 compliant web posting);
Ordering Information	
Cost	$ 0.00 (Price/Unit)
Name	Leslie LaVergne
Phone	601-266-6225
Email	leslie.lavergne@usm.edu
Primary Staff Name	Leslie LaVergne

Added 10/19/2018 10:16 AM **By** aellis **Owner** aellis

NIRS FAQ Sheet

(Updated 6/13/2016)

Q. Does Survey information for TA need to be collected for each quarter or just once a year?
A. Yes, it needs to be done quarterly and the results will be aggregated and entered into NIRS.

Q. Public School attend some Professional Development/Trainings but will not receive CEUs/Certificates of Completions, so that would be labeled as Community Training and not Continuing Education, correct?
A. Yes, no CEUs/Certificate of Completion offered, it is Community Training in NIRS.

Q. Should we list a Funding Agency as a Collaborating Agency?
A. Yes, especially if it is a Title V Agency, MCHB or another UCEED.

Q. Is Facilitating a meeting Technical Assistance?
A. No. Is this something that is mandated by the Project/Funder? Is it written into the Scope of Work for the Project?

Q. Is attending a meeting with Partners, Boards, etc., Technical Assistance, Community Training or another item?
A. The meeting goes into NIRS under the project if it is held by the CDD and is part of the requirement for the Project. But the facilitating of the meeting for the participants is not entered into NIRS.

Q. A Funder requires Information Disseminations, does this go into NIRS if it is also tracked by another method (i.e. Excel, Access, etc.)?
A. Yes, if you are collecting it because it is required to report to a funder, then it needs to be entered into NIRS.

Q. ABAI Ethics SIG Meeting 12:00pm MST - The meetings with this group are for coordinating research projects we are finishing and for administrative roles related to the Ethic Special Interest Group. I am not sure of the definitions for classification, but it seems administrative fits best.
A. Was there some confusion as to the category for REACH and NIRS? For REACH it would most likely be Admin, for NIRS it would be LEND in this case. Not all events go into NIRS.

Q. Should all activities be entered into NIRS?
A. No, are the activities really connected to a project and required by the project. NIRS is not a record keeping system for all activity for departments, like Outlook, only entries for activities directly tied and required by projects.

Q. Are webinars trainings or courses? Are archived webinars something to be recorded in NIRS once?
A. They are trainings and are recorded only once.

Q. Projects are listed as being related to Title V and MCHB but the subsequent activities do not have collaborators/participants with the same attributes. This causes missing report information for LEND/EHB reports. Also, not everyone knows the LEND Faculty/Trainees.
A. This will be discussed at SLT.

Q. Due dates for entry of information in NIRS.
A. Two weeks after the quarter ends. Tony will send this reminder; Gayle will send reminder following quarters.

Q. Can development time for new courses, information and training materials be entered?
A. No, see #8.

Q. Is collaborating Technical Assistance? An example is Boards? Should those be entered into NIRS, could they be considered Community Training? Another example was when an individual server as a coach/mentor for a school or group because they did not have experience in a particular area.
A. Is it part of a project? Talk to the Division Director to see if this should be entered into NIRS and which project it would fall under.

Q. Does a Dissertation or Thesis need to be submitted to UNM to be eligible to be included as a product under NIRS?
A. Yes, it must be submitted to UNM to be included.

Q. Can the research for a grant be entered into NIRS?
A. No. If the grant is accepted, it most likely will become a project later.

Q. Is there a way to enter more than 2 projects for an activity?
A. Not currently. They are working on a way for this to happen in the future. If there is a need for this to occur, we can make a field for this to track ourselves.

Q. Early Childhood was entering Technical Assistance records for each Agency that called (which could result in over 31 records) in a detailed tracking period. Now, they enter a record for the primary recipient (example is the DOH instead of one of the 31 agencies under them) and the secondary is Early Childhood. They have the information if it is needed but this saves on entry and possible double entry. Can they keep doing it this way?
A. Yes

Q. What exactly does the question, "Did the event address screening tools, diagnostic tools and/or evidence-based interventions for ASD/DD? "mean?
A. The question is used to determine if the activity met requirements for CAAI (or Autism Cares). Did you train on screening tools, diagnosis tools and/or evidence based-practices?

Q. What does the terms used in Intensity of TA mean?
A. The Intensity of Technical Assistance (TA) was designed to show a sustained relationship with the UCEDD. A sustained relationship is defined as on-going frequent, with more than 3 contacts per

year. If you provide TA to recipients less than 3 times a year, the "intensity" of the TA is less. The choices are: One Time Brief (single), one time extended (multi-day contact provided one time), on-going frequent (3 or less contacts per year) or on-going frequent (more than 3 contacts per year).

Q. Should I enter the 2015 Deaf Blind Census Report as a product?

A. If the report is a commissioned evaluative or investigative report, it should be entered. See the chart below.

Reports and monographs (including policy briefs and best practices reports)	**Includes**	**Excludes**
Materials prepared without a blind reviewing strategy for *print or electronic* publication that offers • (a) an account, description or explanation of a single thing or class of things; • (b) reference information on a particular topic; or • (c) basic, technical, analytical, investigative, or evaluative information.	• Monograph • Research, consultancy, or technical reports • Guides • Handbooks • Whitepapers • Commissioned evaluative or investigative reports • Policy briefs	• Grant or contract progress reports • Publications included in "Newsletters" • Publications included in "Public Awareness Materials" • Editorials, book reviews, and other non-scholarly articles accepted for publication in reports and monographs

Q. We occasionally do mailing out to parents about conferences and workshops, trainings that we are not hosting. Would that be considered a product?

A. See the chart below for the definition of newsletters since these are not referred publications. It will also ask if they are mailed out on a fixed schedule/interval.

Newsletters Materials prepared for *print or electronic* publications that are not refereed and are issued at either fixed intervals or on an occasional basis.	• Newsletters • Articles or editorials published in newspapers, newsletters, or magazines • Issue briefs	• Publications included in "Reports and monographs"

AUCD

NIRS v2.0

User Manual

Written by:

Natalie Martinez, AUCD
Data Support Manager

Oksana Klimova, AUCD
Director, Web Services

Contents

1. Introduction

Project Scope:

- Update NIRS Application appearance to improve user interface and user experience.
- Add Center Dashboard landing page.
- Add Email functionality that will be used by Directors and Data Coordinators to communicate with current trainees.

Terminology: In this manual we will refer to newly redesign NIRS as NIRS v2.0. The previous version is referred as NIRS v1.0.

New Functionalities and Enhancements across NIRS v2.0

A. Responsive layout
B. Anchored horizontal menu
C. HTML5
D. Unique color identifying each dataset
E. Center's Dashboard
F. Resource Library
G. My Notes
H. Separation of Standard and Custom Reports. Custom Report is now a stand-alone tool.
I. Trainee data set: Quick Email tool (email functionality to be used by Directors and Data Coordinators to communicate with current trainees)
J. Use of new management tool (displayed as 3-dot icon)
K. Sub-menu displayed in two-column format
L. Paging module
M. Option to display selected number of records per page
N. Search datasets over multiple years made available directly on a dataset list page
O. Revised list of columns displaying item information in each dataset

2. Key Administrative Contacts

For general Application questions, please contact:
Natalie Martinez
Data Support Manager, AUCD
nmartinez@aucd.org or (301) 588-8252 ext. 221

If you have technical problems or need to report Application errors, please contact:
Oksana Klimova
Director, Web Services
oklimova@aucd.org or (240)821-9378

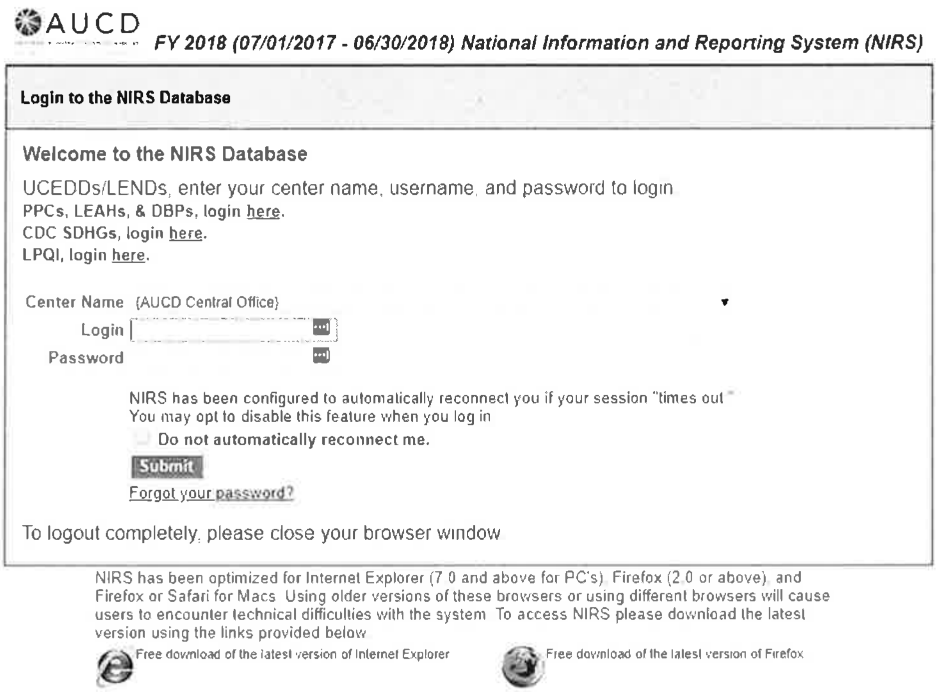
Or use link "NIRS 2.0 Feedback" located in a footer are of every NIRS page:
https://www.surveymonkey.com/r/LCMLGSF

3. **Login Page**

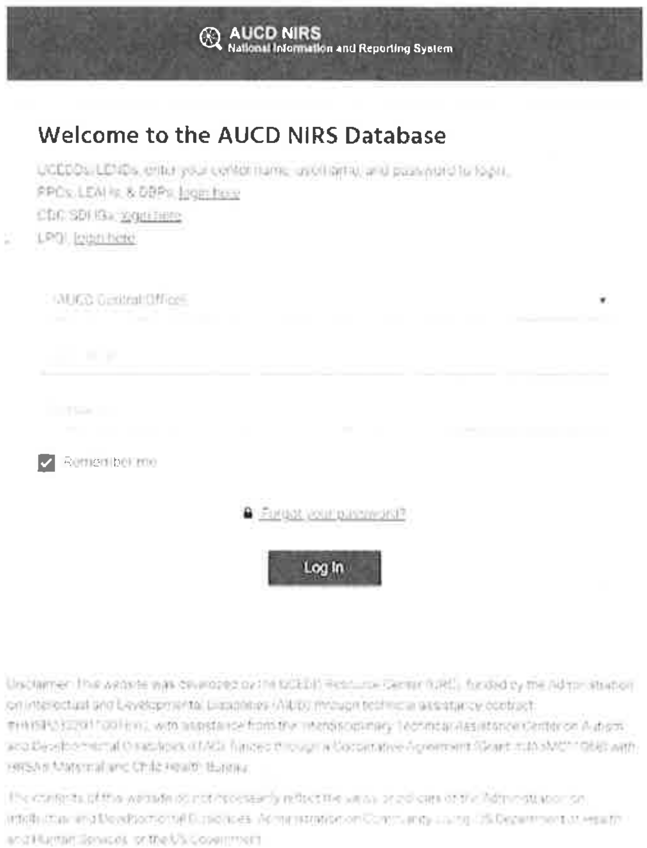
3.1 **Overview**

Functionality is same though there are differences in appearance. Outdated language about different type of browsers was taken out.

NIRS v1.0



NIRS v2.0



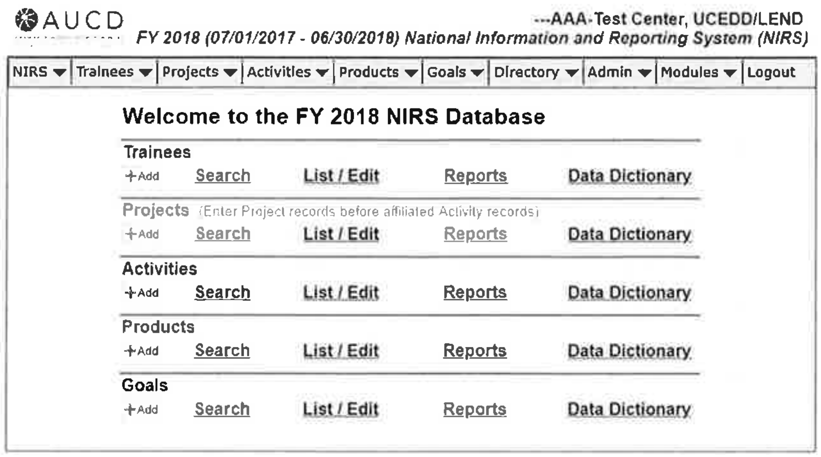
4. Dashboard

4.1 Overview

Upon login, in the NIRS v1.0, Center Faculty/Staff accessed the landing page to select the dataset and action they would want to perform.

In NIRS v2.0, upon login, Center Faculty/Staff will lead to a new Dashboard.
Dashboard will provide real-time statistics for each dataset, financial report for the current fiscal year, and access to Resource Library and My Notes sections.

NIRS v1.0



NIRS v2.0

4.2 **Permissions**

Based on user permission the landing page upon login will be different.

1. Users with permissions Admin (Center Director and Data coordinator(s)) will find following areas:
- First row: list of all datasets with real-time number of records in each.
- Second row: graphical visualization up-to date financial information for current fiscal year (% of total leveraged).
- Third row: Resource Library
- Third row: My Notes

2. Users with permissions Write/Read, Write/Read Only, Assistant, Read Only (Faculty/Staff users):
- First row: list of all datasets with real-time number of records in each.
- Second row: Resource Library
- Second row: My Notes

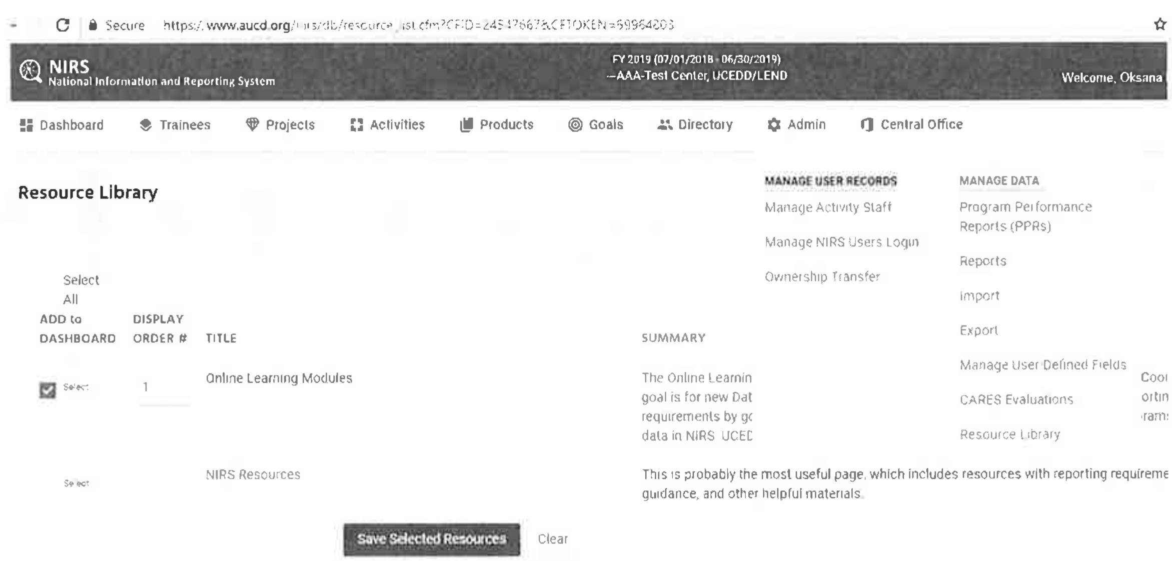
  *Dashboard <u>will NOT include</u> graphical visualization up-to date financial information.

4.3 **New Tool: Resource Library**

Resource Library display list of resource items that will be added through the AUCD Content Management System as News/Documents with Type "NIRS Resources". AUCD will add list of documents that will be recommended by Data Coordinators.

Data Coordinator will be able to select most relevant resource for his/her centers using administrative tool, Resource Library. The Tool is located in the "Administrative" area of NIRS. Data Coordinator can assign display order to each resource.

NIRS v2.0/ Admin/ Resource Library



Selected resources will be display on the Dashboard page, area "Resource Library".

NIRS v2.0/ Dashboard/ Resource Library

Resource Library

TITLE	
Online Learning Modules/Oksana Test	The Online Learning Modules replace the in person orientation to NIRS for new Data Coordinators. T... More Text
jen test resource 2	summary jen's here. summary jen's here. summary jen's here. summary jen's here. summary jen's here... More Text
crudite with hummus	I know you're gonna miss me when you're gone... More Text
crudite with hummus	
Douglas May 8 Resource	This is the summary. This is the summary. This is the summary. This is the summary. This is the su... More Text
Douglas Resource Alpha	This record was created in the ALCO Admin >> Content >> News Documents Search This r... More Text
jen's resource 1	
Second NIRS Resource Record	Lauren Gibson. Lauren Gibson. Lauren Gibson. Lauren Gibson. Lauren Gibson. Lauren Gibson. Lauren G... More Text

4.4 New Tool: My Notes

The tool, My Notes let's anyone with NIRS login account create personal notes. Notes can be created, updated and deleted. To add new note, user will click button "New Note".

NIRS v2.0/ My Notes

My Notes

New Note

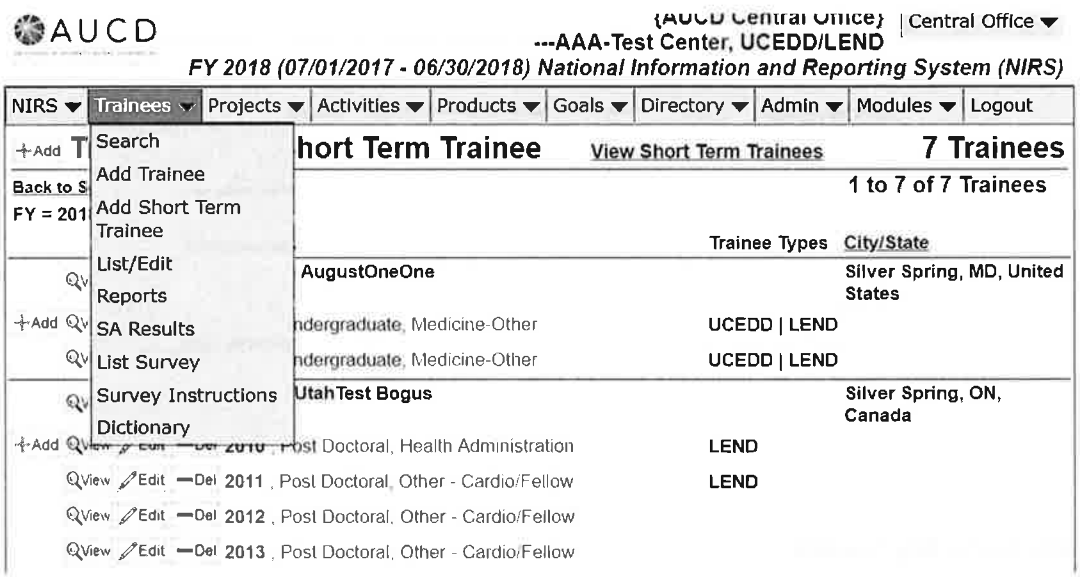
DATE	MANAGE	TITLE
07/18/2018 05:07 PM	•••	Note 7/18
07/17/2018 05:57 PM	•••	03. TEST Review the Directory and Admin sections on July 18th
07/17/2018 02:12 PM	•••	crudite with hummus
07/17/2018 02:12 PM	•••	Egg, Spinach, Feta Sandwich
07/17/2018 01:58 PM	•••	02. Third Note
07/17/2018 01:56 PM	•••	01. Second Note Edited

5. Trainee Dataset

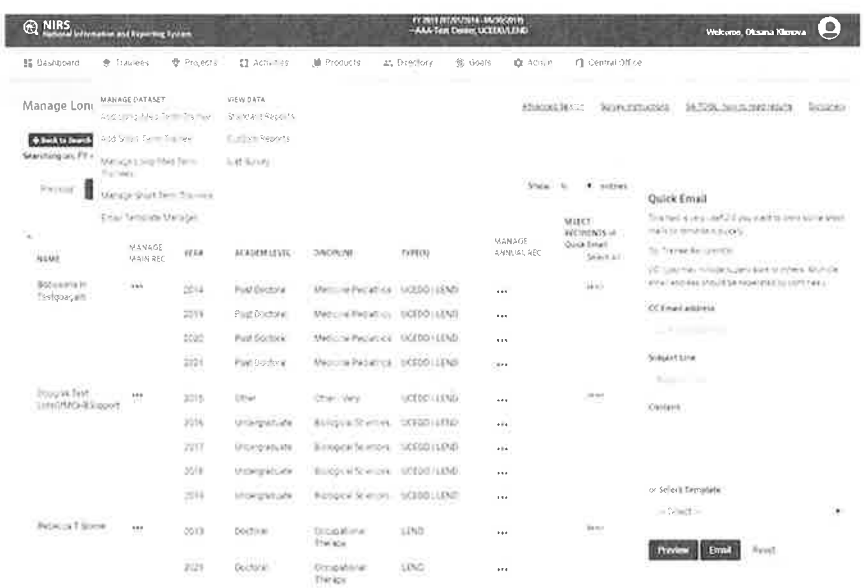
5.1 Overview

The Trainee dataset navigational menu enables users to manage trainees' records and view reports-both standard and customized.

NIRS v1.0 Trainees Dataset



NIRS v2.0 Trainees Dataset



5.2 What's New in Trainee dataset, NIRS v2.0

Sub-Nav menu

Two columns:
Left:
MANAGE DATASET

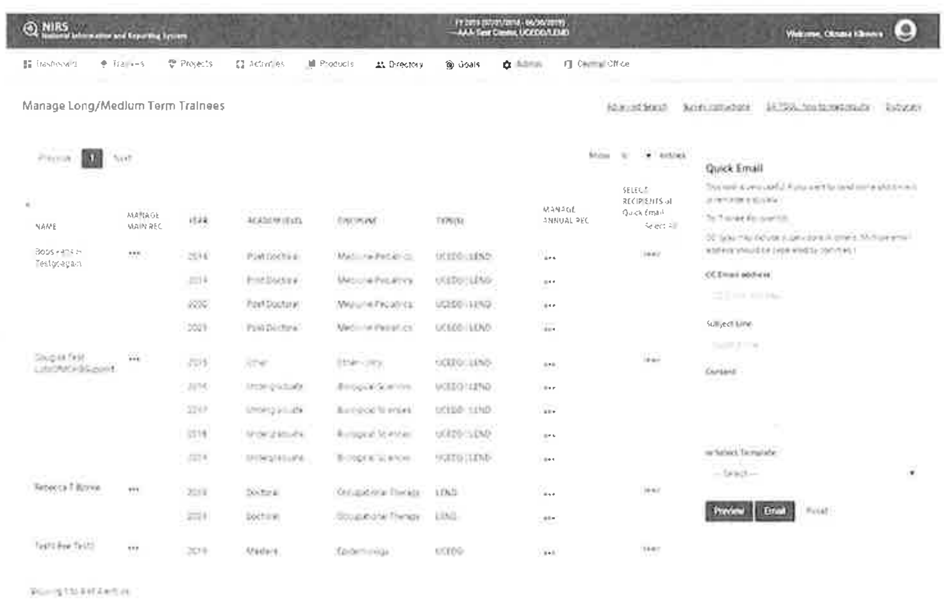
- Add Long Term/Medium Term Trainee
- Add Short Term Trainee
- Manage Long/Medium Term Trainees
- Manage Short Term Trainees – NEW option in menu
- Email Template Manager – NEW option in menu, relate to the new Tool "Quick Email"

Right:
VIEW DATA

- Standard Reports – NEW separate page
- Custom Reports – NEW separate page
- Survey List

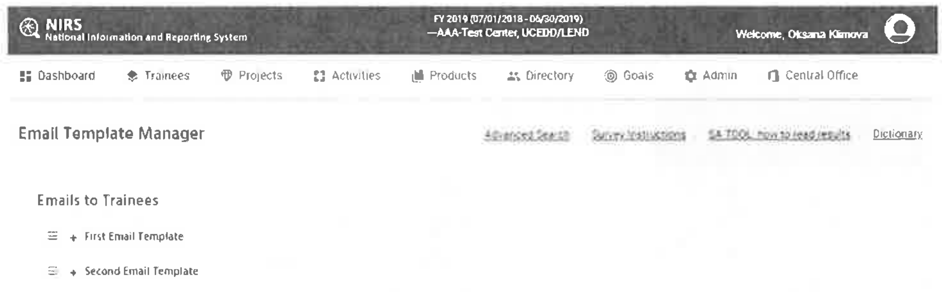
Quick Email Tool

Quick Email Tool exists only for Long/Medium Trainees and available from page Manage Long/Medium Terms Trainees:



By selecting checkboxes, administrators can add Trainee e-mail addresses into the email recipient field. Administrators can select one of the e-mail templates or send a custom e-mail by manually typing text into the subject line and content fields.

For the 2018-2019 phase, we provide two templates that can be accessed from Email Template Manager page:



Each template allows Center-specific modifications for Subject, From address, Introduction, Footer, and Signature.

We also provide Delivery Report for each template.

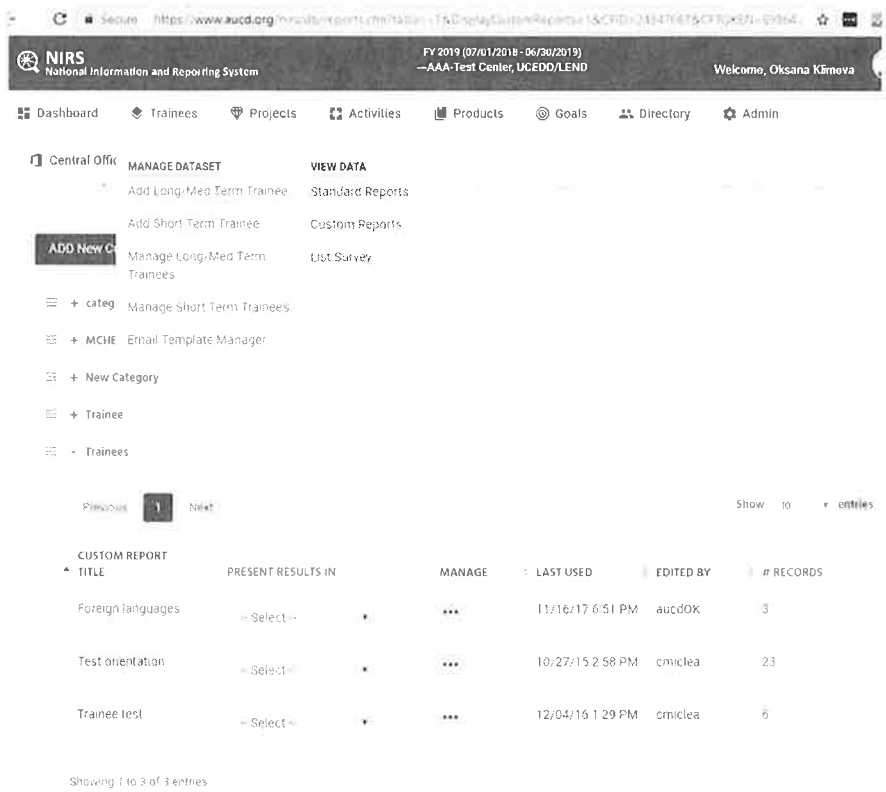
Because NIRS is hosted on aucd.org domain, the emails will be sent from NIRS@aucd.org only.

There is form field "From" available for customization in both templates. Value from that field will be added to the "FROM" email address. Trainee will receive email where "from" address will look like, NIRS@aucd.org (on behalf of #from#).

Reports

One page "Reports" in NIRS v1.0 split to two separate pages, Standard Reports and Custom Reports, in NIRS v2.0.

Custom reports for all centers that were created in NIRS 1.0 were moved into NIRS 2.0.



5.3 Trainee Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

Search

In NIRS v1.0 located in the subnavigation menu, "Search".
In NIRS v2.0 located at the top right corner of the page and renamed to "Advanced Search".
No functional changes.

Add Trainee

In NIRS v1.0 located in the subnavigation menu, "Add Trainee".
In NIRS v2.0 located the subnavigation menu, "Add Medium/Long Term Trainee".
No functional changes in the online form "Add medium/Long Term Trainee".

Add Short Term Trainee

In NIRS v1.0 and v2.0 in the subnavigation menu, "Add Short TermTrainee".

List of Trainees

In NIRS v1.0 located in the subnavigation menu, "List/Edit".
In NIRS v2.0 located the subnavigation menu, "Manage Medium/Long Term Trainee".

NEW: New columns, "Academic Level" and "Discipline" were introduced. Column "City/State" was taken out.

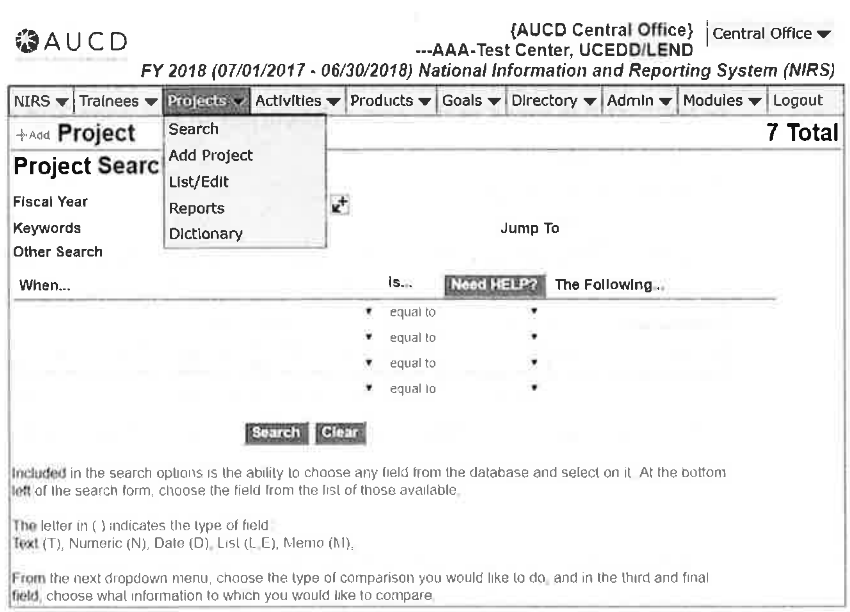
NEW: "Paging module", "Show ##" of records per page (include option "All") were added to the page.

Reports	In NIRS v1.0 there is one page that accommodate Standard and Custom reports. In NIRS v2.0 there are two separate sections • Standard reports • Custom Reports
Link "SA Results"	This link was renamed to "SA TOOL: how to read results" and moved to the top right location of the section. It's visible only to Admin users.
List Survey	Left without any changes.
Survey Instructions	Link moved to the top right location.
Dictionary	Link moved to the top right location.

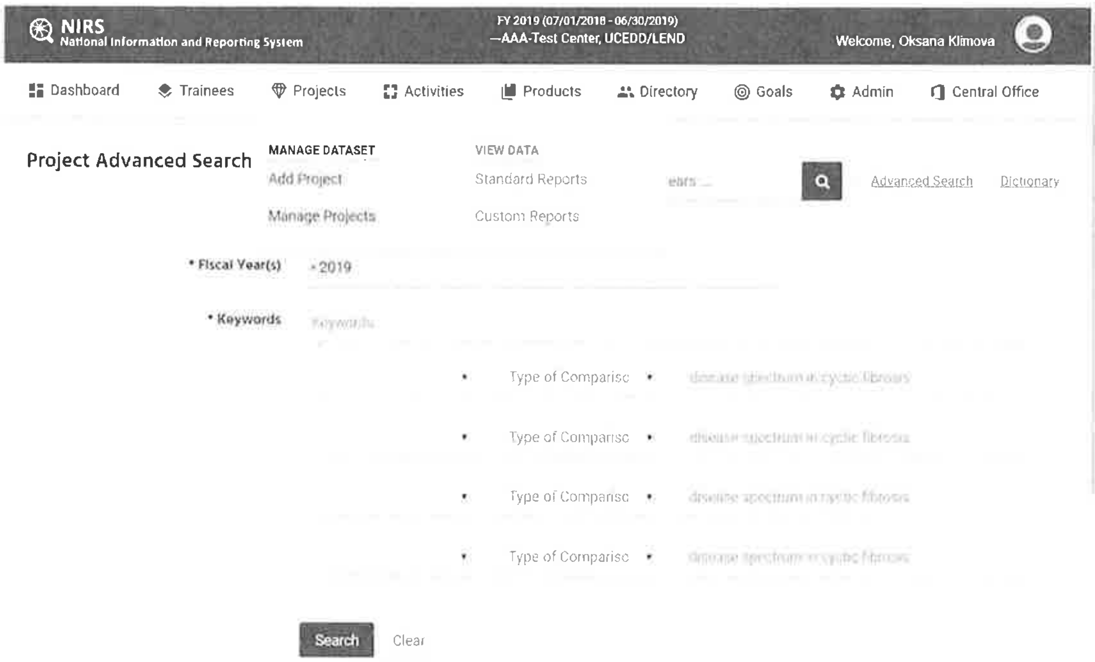
6. Projects Dataset

6.1 Overview

NIRS v1.0 Projects Dataset



NIRS v2.0 Projects Dataset



6.2 What's New in Projects Dataset, NIRS v2.0

Sub-Nav menu	Two columns: Left: <u>MANAGE DATASET</u> • Add Projects • Manage Projects Right: <u>VIEW DATA</u> • Standard Reports – NEW separate page • Custom Reports – NEW separate page
Reports	One page "Reports" in NIRS v1.0 split to two separate section, Standard Reports and Custom Reports, in NIRS v2.0.

6.3 Projects Dataset Functionality Comparison NIRS v1.0 and NIRS v2.0

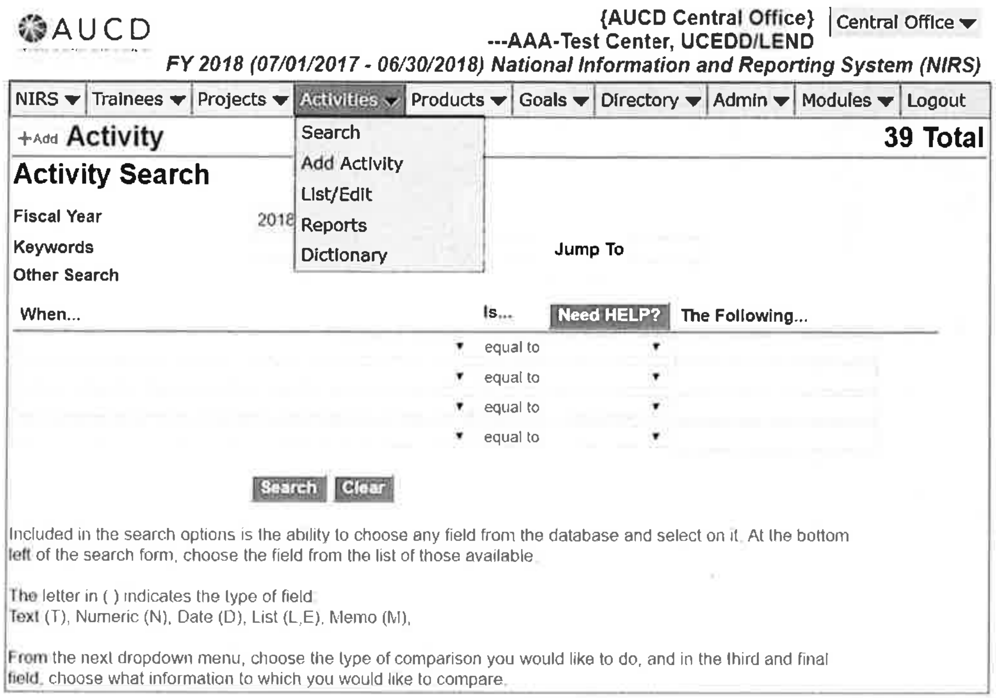
Search	In NIRS v1.0 located in the subnavigation menu, "Search". In NIRS v2.0 located at the top right corner of the page and renamed to "Advanced Search". No functional changes.
Add Project	In NIRS v1.0 located in the subnavigation menu, "Add Project". In NIRS v2.0 located the subnavigation menu, "Add Project". No functional changes in the online form "Add Project".
List/Edit	In NIRS v1.0 located in the subnavigation menu, "List/Edit". In NIRS v2.0 located the subnavigation menu, "Manage Projects". **NEW:** Added new column, "Type of Activity".
Reports	In NIRS v1.0 there is one page that accommodate Standard and Custom reports. In NIRS v2.0 there are two seprate sections • Stadard reports • Custom Reports
Dictionary	Link moved to the top right location.

7. Activities Dataset

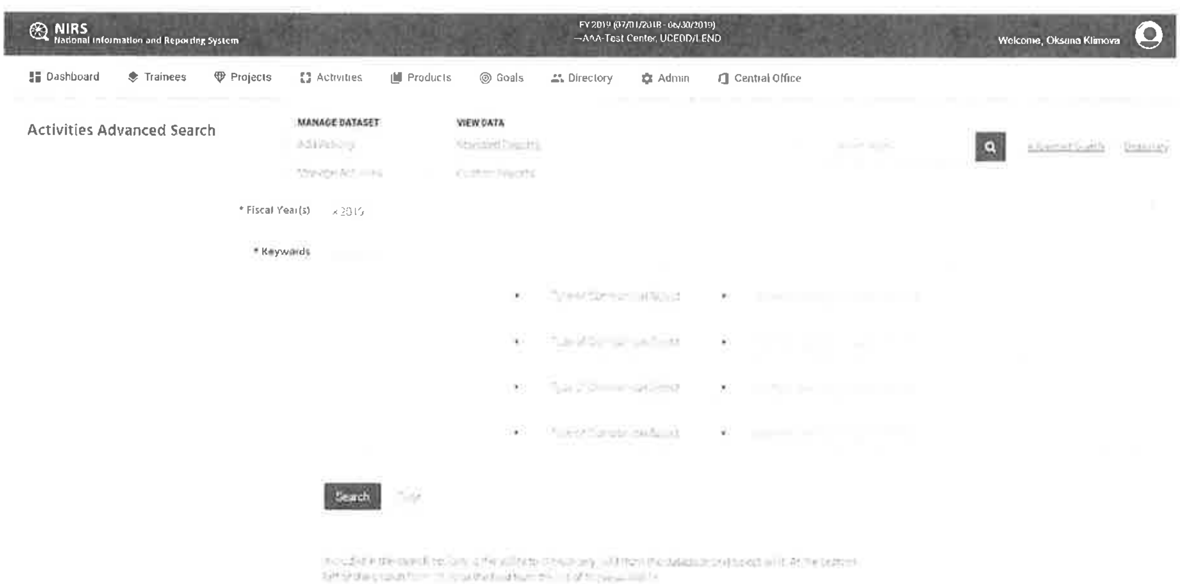
7.1 Overview

The Activities dataset can assist users with managing, adding and editing their activities.

NIRS v1.0 Activities Dataset



NIRS v2.0 Activities Dataset



7.2 What's New in Activities Dataset, NIRS v2.0

Sub-nav menu	Two columns: Left: MANAGE DATASET • Add Activity • Manage Activities Right: VIEW DATA • Standard Reports • Custom Reports
Reports	One page "Reports" in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0.

7.3 Activitites Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

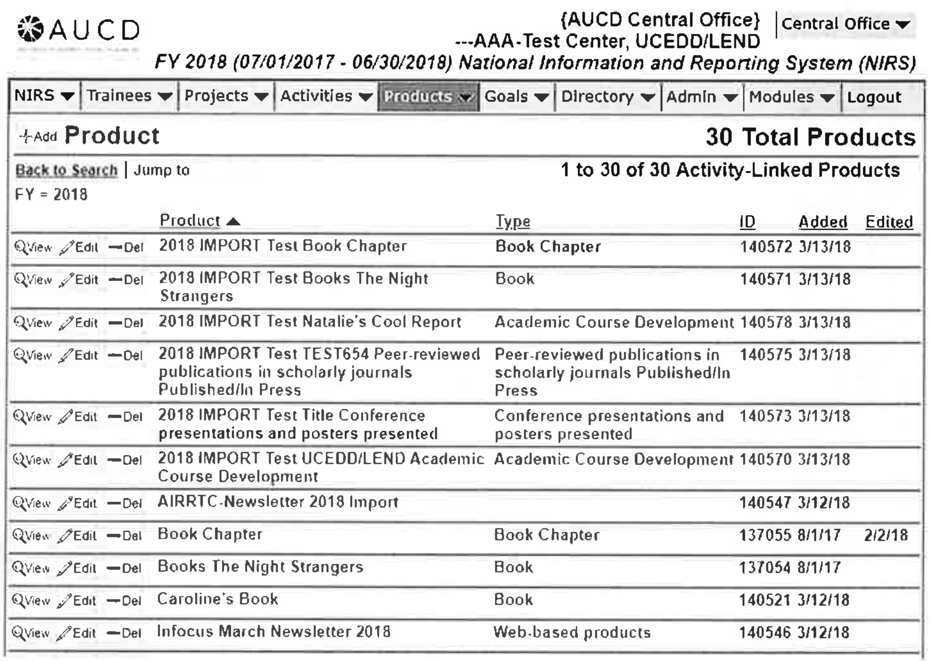
Search	NIRS v1.0-found in the subnavigation under the Activities Header. NIRS v2.0- "Advanced Search ", link found in the upper right hand corner of the dataset view.
Add Activity	NIRS v1.0- found in the subnavigation under the Activities header. NIRS v2.0- found in the subnavidation under the Activities header. No functional change.
List/Edit	In NIRS v1.0 located in the subnavigation menu, "List/Edit". In NIRS v2.0 "List/Edit" was renamed to "Manage Activities". No functional change.
Reports	In NIRS v1.0 there is one page that accommodate Standard and Custom reports. In NIRS v2.0 there are two seprate sections • Stadard reports • Custom Reports
Dictionary	Link moved to the top right location.

8. Products Dataset

8.1 Overview

The Products dataset assist users with managing, adding and editing their products and publications.

NIRS v1.0 Products Dataset



AUCD

{AUCD Central Office} | Central Office
---AAA-Test Center, UCEDD/LEND
FY 2018 (07/01/2017 - 06/30/2018) National Information and Reporting System (NIRS)

NIRS | Trainees | Projects | Activities | Products | Goals | Directory | Admin | Modules | Logout

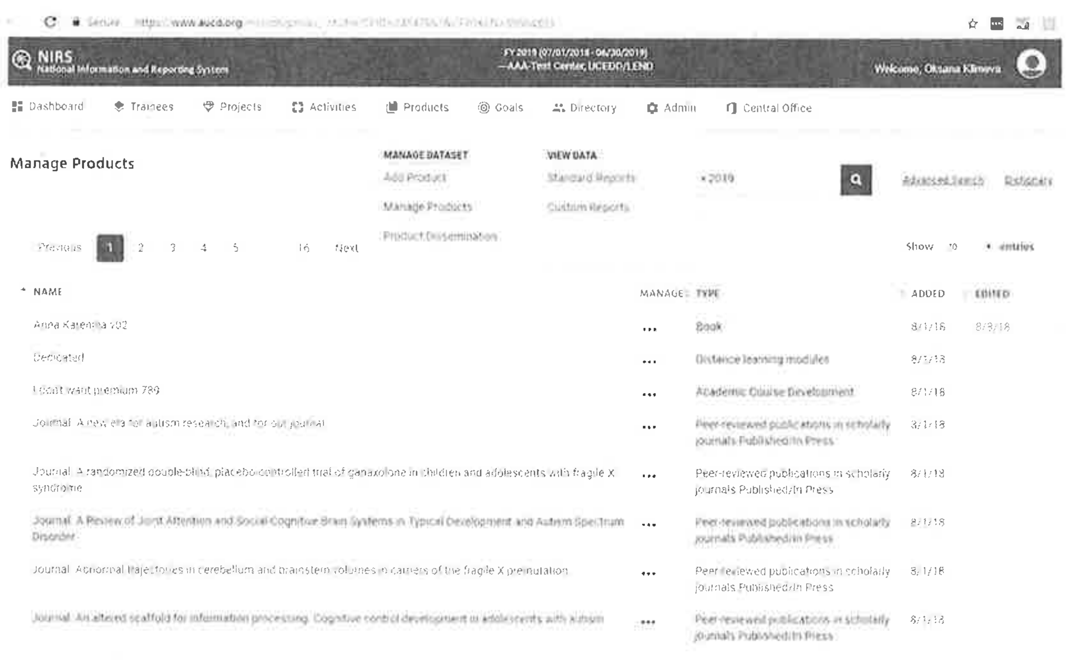
+Add **Product** — **30 Total Products**

Back to Search | Jump to — **1 to 30 of 30 Activity-Linked Products**

FY = 2018

	Product ▲	Type	ID	Added	Edited
View Edit Del	2018 IMPORT Test Book Chapter	Book Chapter	140572	3/13/18	
View Edit Del	2018 IMPORT Test Books The Night Strangers	Book	140571	3/13/18	
View Edit Del	2018 IMPORT Test Natalie's Cool Report	Academic Course Development	140578	3/13/18	
View Edit Del	2018 IMPORT Test TEST654 Peer-reviewed publications in scholarly journals Published/In Press	Peer-reviewed publications in scholarly journals Published/In Press	140575	3/13/18	
View Edit Del	2018 IMPORT Test Title Conference presentations and posters presented	Conference presentations and posters presented	140573	3/13/18	
View Edit Del	2018 IMPORT Test UCEDD/LEND Academic Course Development	Academic Course Development	140570	3/13/18	
View Edit Del	AIRRTC-Newsletter 2018 Import		140547	3/12/18	
View Edit Del	Book Chapter	Book Chapter	137055	8/1/17	2/2/18
View Edit Del	Books The Night Strangers	Book	137054	8/1/17	
View Edit Del	Caroline's Book	Book	140521	3/12/18	
View Edit Del	Infocus March Newsletter 2018	Web-based products	140546	3/12/18	

NIRS v2.0 Products Dataset



8.2 What's New in Products Dataset, NIRS v2.0

Sub-nav menu	Two columns: Left: MANAGE DATASET • Add Product • Manage Products • Product Dissemination Right: VIEW DATA • Standard Reports • Custom Reports
Reports	One page "Reports" in NIRS v1.0 split to two separate section, Standard Reports and Custom Reports, in NIRS v2.0.
Products List page	Column "ID" was removed.

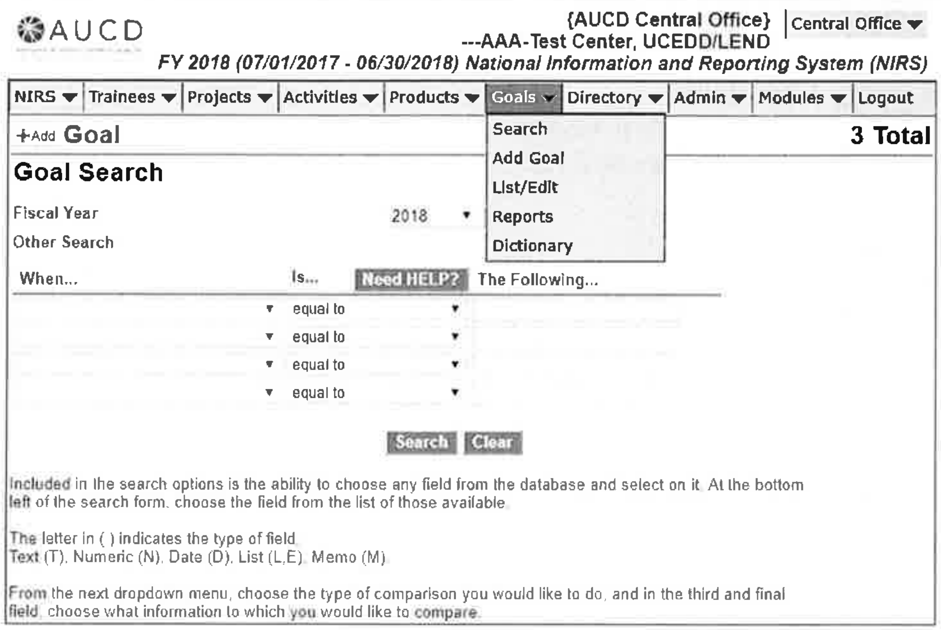
8.3 Products Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

Search	NIRS v1.0-found in the subnavigation under the Products Header- NIRS v2.0- "Advanced Search", it located in the upper right hand corner of the dataset view. No functional change
Add Product	NIRS v1.0- found in the subnavigation under the Products header NIRS v2.0- found in the subnavigation under the Products header No functional changes.
List/Edit	In NIRS v1.0 located in the subnavigation menu, "List/Edit". In NIRS v2.0 "List/Edit" was renamed to "Manage Product". No functional changes.
Product Dissemination	NIRS v1.0- found in subnavigation under the Products header NIRS v2.0- found in subnavigation under the Products header. No functional changes.
Dictionary	Link moved to the top right location.

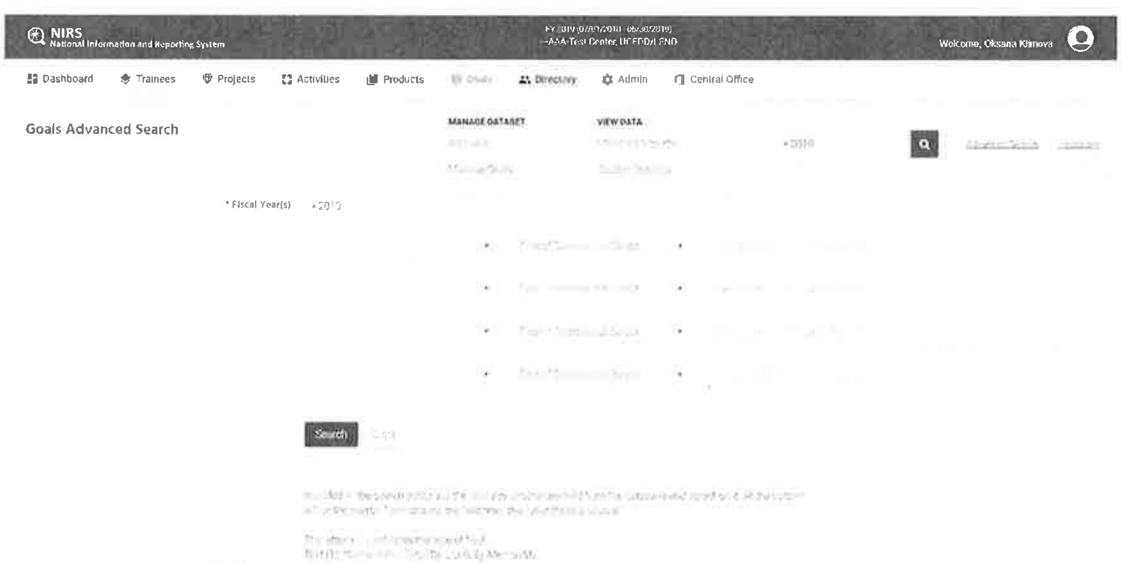
9. Goals Dataset

9.1 Overview

NIRS v1.0 Goals Dataset



NIRS v2.0 Goals Dataset



9.2 What's New in Goals Dataset, NIRS v2.0

Sub-nav menu	Two columns: Left: MANAGE DATASET • Add Goal • Manage Goal Right: VIEW DATA • Standard Reports • Custom Reports
Reports	One page "Reports" in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0.

9.3 Goals Dataset Functionality Comparison NIRS v1.0 and NIRS 2.0

Search	NIRS v1.0-found in the subnavigation under the Goals Header- NIRS v2.0- "Advanced Search ", located in the upper right hand corner of the dataset view. No functional changes.
Add Goals	NIRS v1.0- found in the subnavigation under the Goals header. NIRS v2.0- found in the subnavidation under the Goals header. No functional change.
List/Edit	In NIRS v1.0 located in the subnavigation menu, "List/Edit". In NIRS v2.0 "List/Edit" was renamed to "Manage Goals". No functional changes.
Dictionary	Link moved to the top right location.

10. Directory

10.1 Overview

The Directory section assist users with managing Center information, Center faculty/Staff records that published in AUCD online Directory for UCEDD and LEND Centers. Also, provide ability to run staff reports.

NIRS v1.0 Directory

NIRS v2.0 Directory

10.2 **What's New in Directory, NIRS v2.0**

Sub-nav menu	Two columns: Left: <u>MANAGE DATASET</u> • Manage Center Info • Add Faculty/Staff Profile • Staff Profile • Manage Faculty/Staff Profiles Right: <u>VIEW DATA</u> • Directory Dashboard • Standard Reports • Custom Reports
Reports	One page "Reports" in NIRS v1.0 split to two separate sections, Standard Reports and Custom Reports, in NIRS v2.0.

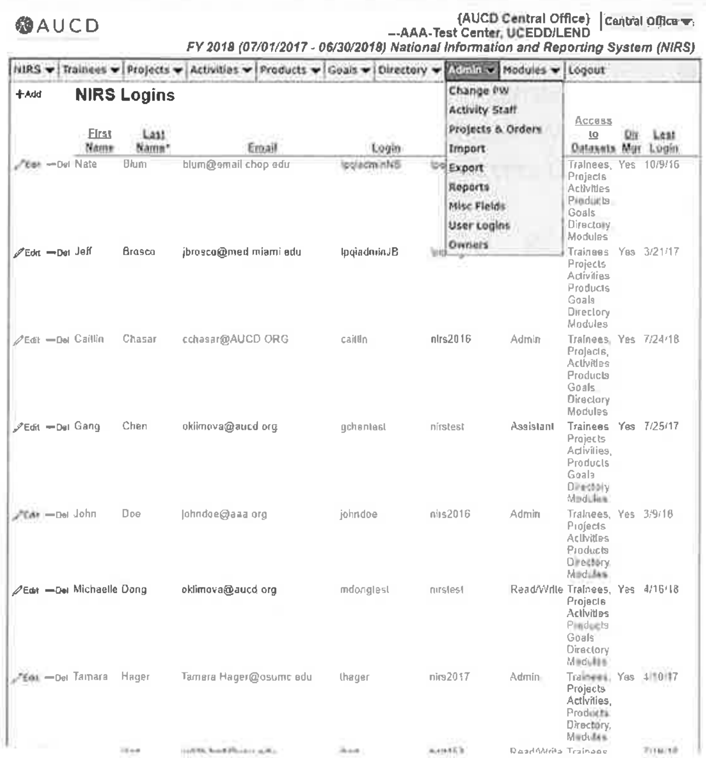
10.3 **Directory Functionality Comparison NIRS v1.0 and NIRS 2.0**

Dashboard	NIRS v1.0-Click on the Directory > Dashboard and it will take the user to a Mange Center Info page. NIRS v2.0- Link "Dashboard" was renamed into "Manage Center Info". No functional changes.
Add Contact	NIRS v1.0- found in the subnavigation under the Directory header, Add Contact. NIRS v2.0- found in the subnavigation under the Directory header, Add Faculty/Staff Profile. No functional changes.
Faculty/Staff	NIRS v1.0- Page enables users to edit, delete or save changes to a Faculty/Staff record. NIRS v2.0- Page enables users to edit, delete or save changes to a Faculty/Staff record. Page was renamed to "Manage Faculty/Staff Profiles". No functional changes.
Directory Dashboard	Anchored link to the Search Staff profiles on page Mange Center Info.
Search Directory	Link created at the top right location.
Dictionary	Link moved to the top right location.

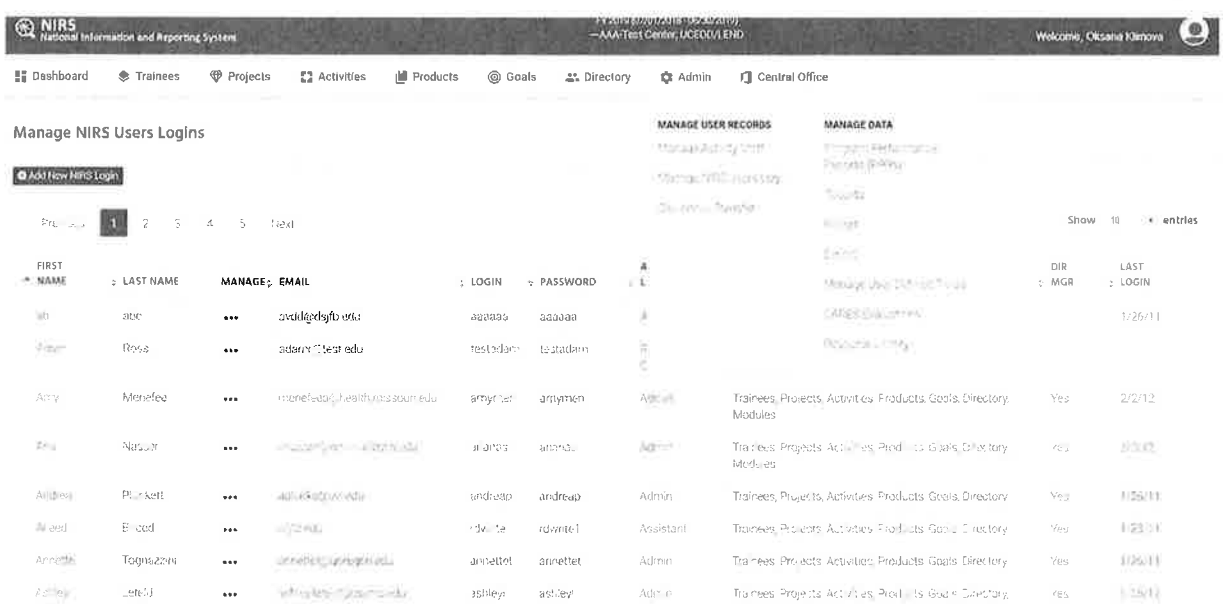
11. Admin

11.1 Overview

NIRS v1.0 Admin



NIRS v2.0 Admin



11.2 **What's New in Admin, NIRS v2.0**

Sub-navigation	The navigation has changed for the Admin dataset. The navigation is split into 2 columns. Left: <u>MANAGE DATASET</u> • Manage Activity Staff • Manage NIRS User Logins • Ownership Transfer Right: <u>VIEW DATA</u> • Program Performance Reports • Reports • Import • Export • Manage User-Defined Fields • CARES Evaluations • Resource Library
Change Password	The change password function was moved and now located in profile menu, in the upper right hand corner by clicking on the person icon.
Tab in the main menu "Modules"	NIRS v1.0 - found in the main navigation area NIRS 2.0 – tab was folded in to Admin section and now there is a seprate subnavigation item in the Admin section, CARES Evaluations.
New tool: Resource Library	Data Coordinator will be able to select most relevant resource for his/her centers using administrative tool, Resource Library. Tool located in the "Administrative" area of NIRS. Data Coordinator can assign display order to each resource.

11.3 **Admin Functionality Comparison NIRS v1.0 and NIRS 2.0**

Change PW

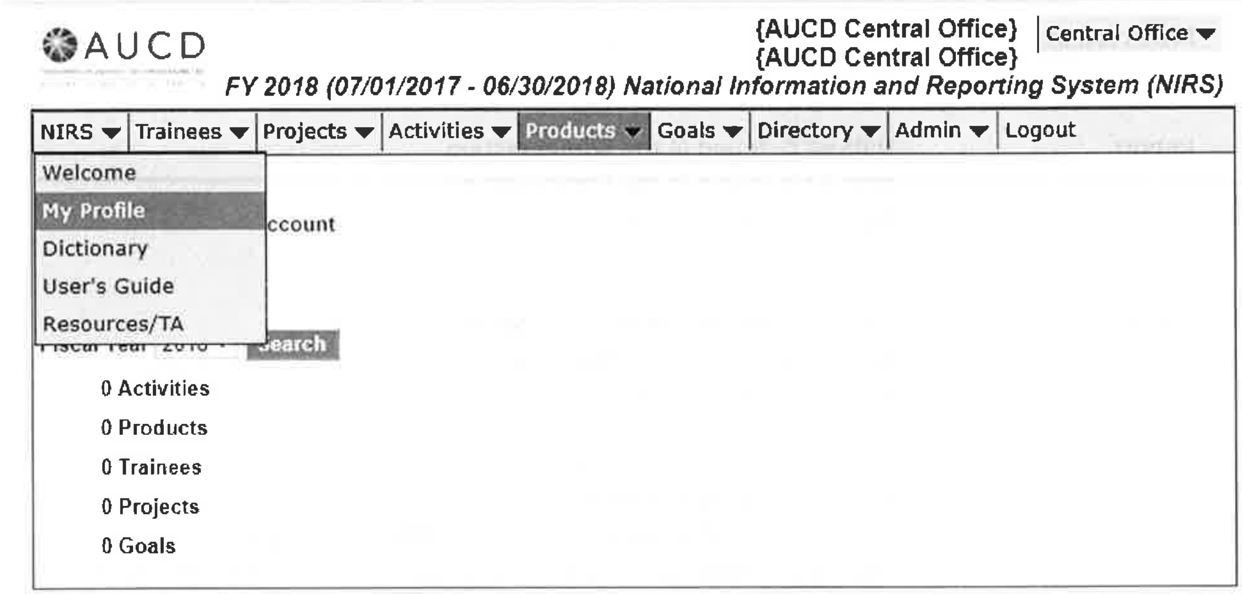
NIRS v1.0-found in the Admin section
NIRS v2.0- Move under the User icon navigation menu (Profile menu)

Activity Staff	NIRS v1.0-found in the Admin section. NIRS v2.0-found in the Admin section, with new header "Manage Activity Staff" No functional changes.
Projects and Orders	Was eliminated completely because functionalities were discontinued three years ago.
Import	NIRS v1.0- found in the Admin section. NIRS v2.0- found in the Admin section. No functional changes.
Export	NIRS v1.0- found in the Admin section. NIRS v2.0- found in the Admin section. No functional changes.
Reports	NIRS v1.0- found in the Admin section. NIRS v2.0- found in the Admin section. PPR reporting was moved to a stand-alone page. There are seprate subnavigation item in the Admin section, Program Performance Reports (PPR). No functional changes.
User Logins	NIRS v1.0- found in the Admin section under the subheader "User Logins" NIRS v2.0- found in the Admin section under the subheader "Manage NIRS Users Login" No functional changes.
Misc Fields	NIRS v1.0- in the Admin section under the subheader "Misc Fields" NIRS v2.0- in the Admin section under the subheader "Manage User Defined Fields". No functional change.
Ownership Transfer	NIRS v1.0- in the Admin section under the subheader "Owners" NIRS v2.0- In the Admin section under the subheader " Ownership Transfer". No functional changes.

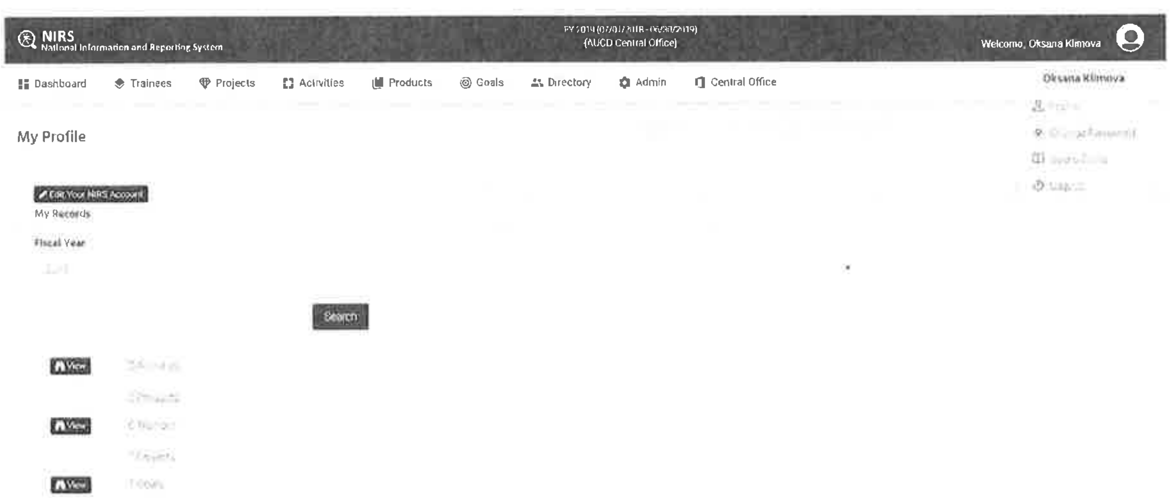
12. Profile

12.1 Overview

NIRS v1.0 Profile



NIRS v2.0 Profile



12.2 What's New in Profile, NIRS v2.0

User can find the menu in the upper right hand corner by clicking on the person icon.

Menu includes:

- Profile
- Change password
- User Guide
- Logout

12.3 Profile Functionality Comparison NIRS v1.0 and NIRS 2.0

Profile	NIRS v1.0-found in the subnavigation under the NIRS menu item. NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon. No functional changes.
Change Password	NIRS v1.0- found in the Admin section. NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon. No functional changes.
User's Guide	NIRS v1.0- found in the subnavigation under the NIRS menu item. NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon. No functional change.
Logout	NIRS v1.0- found as a seprate tab in the menu. NIRS v2.0- found in the menu located in the upper right hand corner by clicking on the person icon. No functional change.

Association of University Centers on Disabilities (AUCD)
National Information and Reporting System (NIRS)
Data Dictionary
Fiscal Year 2018
(7/1/2017 - 6/30/2018)

Sections: Trainees • Projects • Activities • Products • Goals • Directory • CARES •

PURPOSE OF THE DATA DICTIONARY

The web-based National Information and Reporting System (NIRS) is a collective effort by the Association of University Centers on Disabilities (AUCD), its member programs, and their federal partners. Throughout this document, the term Centers is used to refer to ALL organizational units that use NIRS.

Centers enter their data directly into this national database; the database allows network members to manage their own Center data while enabling AUCD to present a picture of the network's activities using aggregate data. NIRS is designed to describe the outputs and outcomes of the network, provide the public with access to the projects and products of the network, and assist the following Centers comply with their federal (and other) reporting requirements:

- University Centers for Excellence in Developmental Disabilities Education, Research, and Service (UCEDD)
- Leadership Education in Neurodevelopmental and Related Disabilities (LEND) Programs
- Leadership Education in Adolescent Health (LEAH) Programs
- Pediatric Pulmonary Centers (PPC)
- Developmental Behavioral Pediatrics (DBP) Programs

UCEDDs receive their core funding from the Administration on Intellectual and Developmental Disabilities (AIDD), and the LEND, LEAH, PPC and DBP Programs receive their core funding from the Maternal and Child Health Bureau (MCHB).

UCEDD and LEND network-wide data collection dates back to 1987. Amendments to the Developmental Disabilities Assistance and Bill of Rights Act (DD Act) included a provision requiring ongoing collection of comparative data that would reflect the national impact of the UCEDD network. A plan was proposed and endorsed at the October 1987 Annual Meeting (AUCD was known at that time as the American Association of University Affiliated Programs) for implementing the network's first national data collection standards; the proposed plan resulted in the 1990 publication, National Information Reporting System (NIRS) for University Affiliated Programs.

Every year, modifications are made to enhance the system; however, since its inception, NIRS has undergone several notable iterations:

- A substantive revision of NIRS occurred with the introduction of a fully web-based NIRS on August 1, 2002 (the FY03 dataset). With this FY03 revision, NIRS not only employed web-based data collection and management strategies, it incorporated (a) the new UCEDD data collection requirements outlined in the DD Act of 2000 and (b) the integration of data elements required by MCH for its LEND Program grantees.
- The FY06 version of NIRS included substantial modifications necessary to assist Centers respond to changes in MCHB and ADD reporting requirements. In late FY05 MCHB introduced the Electronic Hand Book (EHB) interface for annual reporting. Starting with the FY06 data year, UCEDDs began using an annual report function in NIRS to electronically report on their progress to ADD.
- The LEAHs and PPCs began using the NIRS Trainee dataset in FY 2006 to manage their trainee and

trainee survey data, and in FY08 began using all of the NIRS datasets.
- The DBPs began using NIRS beginning with the in the FY 2009 data year.
- The AUCD Directory was merged with NIRS beginning with the FY10 data year.

To support the collection of national data that are credible and that accurately represent the work of the AUCD network programs, the Data Dictionary provides clarification on the conceptual intent of NIRS, definitions of a number of important terms, and guidance for data entry decision-making. The Data Dictionary addresses the purpose of each dataset, describes the types of data to be captured in each dataset, identifies what data is intended to be captured in each field, and defines any codes within fields.

This text provides definitional and conceptual aspects of NIRS. To fully understand NIRS, the Data Dictionary should be used in tandem with the User's Guide, which covers the mechanical aspects of NIRS. The Data Dictionary informs users on data definition and entry issues; the User's Guide instructs users on how to access data entry forms.

Because the fields and codes contained within each of the datasets are rarely redundant, the Data Dictionary chapters are organized to correspond with each of the five individual datasets in NIRS: Trainees, Projects, Activities, Products, and Goals. Within each chapter, explanatory information is provided for each field, including definitions and response options.

Trainees

Overview of Trainee Dataset

The Trainee dataset is designed to capture demographic and contact information on individuals who are in a Center's training program. Information captured in this dataset is used by Centers to produce aggregate demographic information on their trainees, track the progress of individual trainees, and to manage the follow-up surveys presented to trainees. The information in this dataset, aggregated across the network, presents a snapshot of the size and demographics of the network's trainees each year.

The Trainee dataset enables Centers to create and manage multi-year records for all trainees. **Each trainee record actually consists of (a) a main record for the trainee, (b) one trainee year record for each fiscal year that a trainee is enrolled in your training program, and (c) any follow up surveys received from the trainee.**

The Main Record primarily contains information about the trainee that is unlikely to change (i.e., demographics, position at admission, permanent address, etc.) over the course of the training program.

The Year Record primarily contains information about the trainee's experience that is likely to change every year, such as hours completed, funding sources and amounts, enrollment status, etc.

Follow-up Surveys are securely stored and are linked to the trainee main record. Centers can email the survey promptly to trainees and track which trainees have/have not completed surveys. The contact record is auto updated with the most recent contact information provided by survey respondents. Only users with an Admin level of access are able to access individual survey results.

> **Note**: The Trainee dataset is the only dataset in NIRS that allows users to enter records for previous fiscal years. This flexibility allows Centers to populate this dataset with records on former trainees at their convenience. The records in this dataset can then be used to manage the follow-up survey process.

MCHB Trainees (LEND, LEAH, PPC, DBP):

- **Long Term Trainees** are those with 300 or more contact hours with the training program, benefiting from the training grant (both supported and non-supported trainees). Long Term MCHB

Trainees must be tracked throughout their training and for at least 5 years following their training (although to fully assess the impact of the training, trainees may be followed for 10 years). These individuals will be surveyed at 2, 5 and 10 years post-training to assist the Program in responding to a number of MCHB performance measures, such as those focusing on field leadership. Data entered in NIRS for Long Term LEND, LEAH, PPC and DBP Trainees, as well as surveys completed by former trainees are included in the data export from NIRS to MCHB. The data are uploaded into the EHB, where it pre-populates the Long Term Trainee Information and Former Trainee Information forms.

- **Intermediate (Medium) Term Trainees** are those with 40 or more but less than 300 contact hours with the training program. Programs are strongly encouraged to also record Intermediate Term Trainees in NIRS to accurately capture the number of trainees trained each year. Programs may also survey Intermediate Term Trainees using the Trainee Follow-up Survey, although MCH does not currently collect survey data on LEND, DBP or LEAH Intermediate Term Trainees. It does, however, collect survey data on PPC Intermediate Term Trainees.
- **Short Term Trainees** are currently defined by MCHB as trainees who receive a total of or less than 40 hours of training. Centers may capture records on these individuals in the Short Term Trainee mini dataset described later in this chapter.

Historical note on Short Term Trainees: In FY06, the use of Trainee dataset for Short Term Trainees (i.e., those who have less than 40 contact hours with your training program) was prohibited. However beginning in FY07, in response to requests from the network to capture demographic information and continuing MCH reporting requirements on short term trainees, a Short Term mini dataset was created within the trainee dataset. Full records on short term trainees entered prior to FY06 will continue to be available for Centers' use.

UCEDD Trainees:

UCEDD Trainees are Intermediate- and long-term trainees that are participating in a UCEDD interdisciplinary or discipline specific training program. **Individuals should be recorded in the Trainee dataset if they are in your Center's identified training program and receive at least 40 hours of training.** Data on any people who receive training **through** your training program, but are not enrolled in your academic program, should be captured in the Activities dataset rather than the Trainee dataset. For example, if one of your faculty members teaches a class which includes in its roster students who are not in your program, those non-trainees would be best captured in the Activities dataset .

Individuals who receive pre-service preparation as defined below must be captured in the Trainee dataset. Trainees with 40 or more but less than 300 contact hours with the training program qualify as Intermediate Trainees, while trainees with 300 or more contact hours with the training program are Long Term Trainees.

Short term trainees are individuals who receive less than 40 hours of training, and they should not be entered in the Trainees dataset, but rather captured in the Activities dataset. The typical involvement of Short Term Trainees will (a) be less than 40 contact hours and (b) take place in an academic setting (e.g., participation in an entire course taught by Center's faculty, participation in a course where a Center's faculty provide one or more lectures, or participation in lab/practicum/internship/fellowship opportunity with a Center's faculty or staff).

Interdisciplinary pre-service preparation is defined as instructional program offered by the UCEDD that:

1. integrates knowledge and methods from two or more distinct disciplines;
2. integrates direct contributions to the field made by people with disabilities and family members;
3. examines and advances professional practice, scholarship and policy that impacts the lives of people

   with developmental and other disabilities and their families;
4. is designed to advance an individual's academic or professional credentials; **and**
5. takes place in an academic setting or program.

Interdisciplinary pre-service preparation may:

1. lead to the award of an initial academic degree, professional certificate, or advanced academic credential; **and**
2. contribute to a discipline-specific course of study offered by the UCEDD or by another academic department.

These individuals will be surveyed at the end of each year for the Center's annual report to AIDD (under the Interdisciplinary Pre-service Preparation core function) and will be surveyed at 1, 5, and 10 years post-training to assist the Center in responding to a GPRA measure.

Other types of training provided through the UCEDD may be defined as Continuing Education or Community Training (defined below), which are best captured in the Activities dataset. Such training data will be reported to AIDD on their Annual Report under the appropriate core function.

Continuing Education includes seminar(s) or courses of instruction offered by a UCEDD that:

1. serve to maintain professional credentials;
2. encourage professionals to expand their knowledge base and stay up-to-date on new developments; **and**
3. offer certificates of completion or CEUs (or their equivalents).

Community training encompasses training provided by UCEDD faculty/staff to enhance knowledge of a variety of community members (individuals with developmental and other disabilities, their families, professionals, paraprofessionals, policy-makers, students or others in the community).

Other Trainees

Other trainees may also be captured in NIRS. Centers may, but are not required to, enter records for their other trainees, which might include individuals who receive systematic, continuous, interdisciplinary training in a broad range of professional functions or a supervised training, service, and/or research skills.

Trainee Disciplines

The categories include only those discipline categories that are required by MCHB/AIDD and categories that have been specifically requested by the network. Click here for the definitions of some of the following disciplines:

Audiology
Biological Study
Dentistry-Pediatric
Dentistry - Other
Disability Studies
Education: Administration
Education: Early Intervention/Early Childhood
Education: General Education
Education/Special Education
Epidemiology
Family Member/Community Member
Family Studies

Family/ Parents/ Youth Advocacy
Genetics/Genetic Counseling
Gerontology
Health Administration
Human Development/Child Development
Interdisciplinary
Law
Liberal Arts & Science, Humanities, and General Studies
Medicine-General
Medicine-Adolescent Medicine
Medicine-Developmental-Behavioral Pediatrics
Medicine-Neurodevelopmental Disabilities
Medicine-Pediatrics
Medicine-Pediatric Pulmonology
Medicine - Other
Mental and Behavioral Health
Nursing
Nursing-Family/Pediatric Nurse Practitioner
Nursing-Midwife
Nursing - Other
Nutrition
Occupational Therapy
Pastoral
Pharmacy
Person with a disability or special health care need
Physical Therapy
Psychiatry
Psychology
Public Administration
Public Health
Rehabilitation
Respiratory Therapy
Social Work
Speech-Language Pathology

Working in the Trainee Dataset

Adding, Listing, Viewing, Editing, Searching, and Deleting Data in The Trainee Dataset

Creating Long Term/Intermediate Trainee Records (40 or more hours of training)

If the trainee received less than 40 hours of training, he/she should be entered in the Short Term Trainee mini dataset, described later in this chapter.

To create a new Trainee record for a Long term or Intermediate Trainee, choose the Add Trainee option from the Trainees pull-down menu located on the top navigation bar. An Add button with the same functionality is located on the Welcome screen or on any of the Trainee Search, List/Edit and View screens. Clicking on the Addbutton will provide a blank **trainee main record** entry form. Enter all of the trainee's data and click on the Save button.

After the Save button is clicked (and the trainee main record saved), a blank **trainee year record** entry form will be displayed, defaulted to the current fiscal year. If necessary, a different fiscal year may be selected from the drop-down list at the top of the page.

Note: It is crucial that trainees who are in the program for multiple years have only one **main record,** and that new **year records** be attached to this **main record** rather than new **main records** created each year, as this is a leading cause of duplicate records and problems conducting the trainee follow-up survey

Listing Records

The Trainee List/Edit screen displays each trainee main contact record in alphabetical order by last name (or unique identifier). Underneath each trainee main contact record are the trainee year records, listed in chronological order.

The List/Edit function displays only those Trainee Records that have a trainee year record for the current fiscal year. To display other Trainee Records, use the Search function.

Note: In FY10 a Jump to alphabet character feature has been added to the header of the Trainee search queries (the returned character will be the first letter of the person's last name).

Searching Records

The Trainee Search screen displays options by which the Trainee dataset may be searched. The fiscal year pull down menu may be used to select records from a particular year, or all Trainee records may be displayed if All Years is selected from this menu.

Beginning in FY07, a multi year button can be used to identify multiple years to search. To select multiple years, click on the fiscal year in the pull down menu, then click the multi year button. Continue until all desired fiscal years are included. To remove a year from the criteria, simply click on the appropriate numerical text.

Adding Trainee Year Records

To enter additional trainee year record(s) to an existing trainee main record, begin on the List/Edit or Search screen. Click on the Add button next to the Trainee record. A trainee year entry form, pre-filled with the most recent year's information, will be displayed. Modify this form as necessary for the year being reported and click Save.

Viewing Records

To view a Trainee **main record** or **year record**, go to Trainees à List/Edit and click on the View button to the left of the intended record. To continue viewing trainee records, click the Next or Back buttons on the top right corner of the screen. While in a trainee **main record**, clicking on the Next or Back buttons will scroll through all of the main contact records. While in a trainee **year record**, clicking on the Next or Back buttons will scroll through all of the trainee's year records. To get out of the view mode, use the navigation bar to select the desired page or click on the Back button on the browser's tool bar (not the Back button on the NIRS screen) until returning to the desired screen.

Editing Records

To edit a trainee main record or year record, go to Trainees à List/Edit. Click on the Edit button to the left of the intended record. Once all changes have been made to the record, click Save.

Deleting Records

The Del button is used to delete records. To delete a trainee's records, you must first delete the Trainee year record(s). Then, run the Trainee Data Entry Errors Report and click on the trainee's name. The View Trainee form will open up - click on the Del button in the upper right hand corner to delete the main trainee record.

contactID imported Numeric

First Name Text/Numeric

Required Field. NIRS is designed so that each trainee has his/her own Trainee record. Centers may label each Trainee record with the individual's name or may use another unique identifier.

Supply either (a) the trainee's first name, middle name or initial, last name, and any previous, relevant surname or (b) unique identifiers in the relevant fields.

Former Name Text/Numeric

Supply any previous, relevant surname.

Degree

Required field. Select from the pull down menu the **highest degree or credential achieved** by the trainee **prio prior to engaging in your program.**

Home Address1 Text/Numeric

Provide complete information on the trainee's current and permanent addresses. Use the permanent address field to record an address of someone (e.g., a relative) who will be likely to assist in contacting the trainee in the future for follow-up purposes.

> **Note:** Beginning with trainee records entered in the FY05 NIRS reporting period, Work Address fields will no longer be displayed when adding or editing a trainee record. For trainee records that were entered during the FY04 NIRS reporting period or earlier, work address information will continue to be displayed. Starting FY11, the Zip/Postal Code field is no longer restricted to US zip codes only. If the Country selected is different from United States, then an international postal code can be entered, with no format restriction.

County of Origin Text/Numeric

The intent of this field is to support Centers interested in capturing data to document the "statewideness" of their training program.

Because students often move to a location near the school they will be attending, **we strongly recommend** that Centers ask Trainees to provide them with the name *of the county they relocated from* (i.e., county of origin) to attend the school, rather than their current county.

The appropriate list of counties for each state in which the Center is located is provided; the list also includes "unknown" and "out of state" as options.

Primary Email Text/Numeric

Supply the trainee's complete e-mail address. Because the address in this field will be used to deliver follow-up survey information to trainees, consider using an email address *other* than their university student email address.

Secondary Email Text/Numeric

Phone Text/Numeric

Provide a phone number where the trainee would like to be contacted, either home or work, formatted 999-999-9999.

Permanent Name Text/Numeric

Supply the name, their relationship to the trainee, address, and phone of an individual who is likely to know how to contact the trainee in several years' time.

ID Number Text/Numeric

Centers may supply their own alphanumeric trainee ID in this field for internal tracking purposes. This field is discrete from the Trainee Survey Login alphanumeric ID that is automatically generated by NIRS.

Note: DO NOT USE SOCIAL SECURITY NUMBERS AS ID NUMBERS.

Date of Birth Date

Supply the month, date, and year of the trainee's birth, formatted mm/dd/yyyy.

Gender

Required Field. Select the trainee's gender from the drop-down list.

Race

Required Field. Select one racial category.

Beginning in FY06, the NIRS race categories in the Activity and Trainee datasets were made consistent with the US Census categories. In FY11, the last two categories were renamed based on MCHB's reporting requirements.

Race:

- White refers to people having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- Black or African American refers to people having origins in any of the Black racial groups of Africa.
- American Indian and Alaskan Native refer to people having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment. Tribe:________________
- Asian refers to people having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent (e.g. Asian Indian).
- Native Hawaiian and Other Pacific Islander refers to people having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- More than one race includes individuals who identify with two or more racial designations.
- Unrecorded is included for individuals who are unable to identify with the categories.

Ethnicity

Required Field. Select one ethnic category.

Beginning in FY06, the NIRS ethnicity categories in the Activity and Trainee datasets were made consistent with the US Census categories. In FY11, the "Unrecorded" category was added based on MCHB's reporting requirements.

Ethnicity

Hispanic is an ethnic category for people whose origins are in the Spanish-speaking countries of Latin America or who identify with a Spanish-speaking culture. Individuals who are Hispanic may be of any race.

- Hispanic
- Non Hispanic
- Unrecorded

Do you speak a lang. other than Engl. at home

Language other than English Text/Numeric

How well do you speak English?

Position of Trainee at Admis Text/Numeric

Provide the position setting *upon admission* to your program. This could be described as a Government Agency, Post-secondary Setting, Hospital, Non-Profit, For-Profit , Public Health/Title V, Schools or School System and UCEDD/LEND. For example, if the trainee worked as a teacher in a school, then enter "school" as a response. "Upon admission" refers to the trainee's position at the time of admission or acceptance to the training program.

Position Title Text/Numeric

Supply the trainee's primary position title upon admission to your program. For example, if an incoming trainee was an elementary school teacher upon entering your master's program, use "elementary school teacher" as the title. If not employed prior to admission, then put "not applicable" or "student", as appropriate.

Training End Date Date

On the View form, this his is a Display Only field (mm/yyyy) that is auto-populated from the latest Year Completion Date provided in the trainee's year record(s). This is the date that will be used to determine when a trainee exited the training program and for purposes such as querying to conduct trainee follow-up surveys.

This field will update each year when a new trainee year completion date is entered in the trainee's latest year record. If the trainee's completion date is not known when the new year record is created, enter an estimated training completion date. Modify the record once the actual training completion date is known for their final year in the training program.

All completion dates refer to the Center-specific training program, **not** to any additional training outside of the Center.

Personal Relationship with Disabilities

Starting FY 2013, this field has become required (to meet the AIDD reporting requirements), and option Unrecorded has been added.

Select all applicable options from the list that describes a trainee's personal relationship with the field of disabilities and/or special health care needs.

Is the trainee a ... (Check all that apply)

- Person with a disability
- Person with a special health care need
- Parent of a person with a disability
- Parent of a person with a special health care need
- Family member of a person with a disability
- Family member of a person with a special health care need
- Unrecorded

Current Job Position Title	Text/Numeric

Survey ID	Text/Numeric

NIRS automatically generates a unique alphanumeric ID for each new Trainee Record created. This ID is the individual trainee's log-in for the former trainee follow-up survey and is what links the survey record to the trainee record, allowing contact and other main record information to be pre-populated for each survey.

Only trainees entered in the NIRS system and supplied with their unique log-ins will be able to access an online version of the applicable UCEDD, LEND, LEAH or PPC former trainee follow-up survey.

Each Trainee's unique alphanumeric ID (survey login) is editable by the Center; however (with one exception), the system blocks Centers from creating Survey IDs that are not unique. DO NOT USE SOCIAL SECURITY NUMBERS FOR TRAINEE IDENTIFICATION IN NIRS.

Former Trainees Who Are Deceased

Centers are **strongly advised against deleting** the Trainee Records of former trainees who have passed away. The value of historical demographic data is not diminished by the demise of former students. The logic that prevents any Center from having duplicate identifiers has been modified to allow any Center to have an unlimited number of identifiers whose value is the word "deceased." So for deceased trainees, the Trainee Survey Login can be changed to "deceased."

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place of employment	Text/Numeric

Added Date	Date

NIRS automatically captures the date and time the record was created. Subsequent updates to the trainee record will not alter the Added Date.

Search Tip: To search by a specific date in the Added Date field, for example to search for the date 08/28/2012, define one search field as greater than or equal to the date you want (in this case ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012").

Added By	Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who created the record.

Updated Date | Date

NIRS automatically captures the date and time each time a record is updated. The most recent update date/time is displayed.

Search Tip: To search by a specific date in the Updated Date field, for example to search for the date 08/28/2012, define one search field as greater than or equal to the date you want (in this case ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012") .

Updated By | Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who last updated the record.

Training Start Date

On the View form, this is a Display Only field (mm/yyyy) that is auto-populated from the earliest Year Start Date provided in the trainee's year record(s). Until the trainee's first year record is created and a Year Start Date provided, this field is blank.

All start dates refer to the Center-specific training program, not to any additional training outside of the Center.

Short Term Trainees

In response to requests from the network to be able to capture demographic information and continuing MCH reporting requirements on short term trainees, a **Short Term** mini dataset has been created within the Trainee dataset.

MCHB Training Programs (LEND, LEAH, PPC or DBP): As stated in the Add Short-Term Trainee form, this dataset is available for the short-term trainees (less than 40 hours in the program) enrolled in **your Program**.

UCEDD Programs: Please record your short-term trainees (less than 40 hours in the program) in the Activities dataset.

Short Term Dataset Specifications:

- There are no required fields in this dataset.
- This interface may be used to access pre-2006 short term records and to add short term records for any year.
- The custom reports function within the Trainee dataset is used to create custom reports on Short Term data.
- There are 10 user defined fields available for this dataset; they are labeled as "trainee st" under Misc Fields.

Adding, Listing, Viewing, Editing, Searching, and Deleting Short Term Trainees

- To add a record, go to Trainees -> List/Edit. Click on the Add Short Term Trainee button. Complete the record and save it.
- To view/edit/delete a record, go to Trainees -> List/Edit and click on View Short Term Trainees, which will take you directly to the list of Short Term Trainees (otherwise listed on the same page

after the list of Long Term/Intermediate Trainees). Use the Edit button to edit, the View button to view, and the Del button to delete.

- To search for short term trainees in past years, or to refine your search of short term trainees on some other variable, use the Search Function. You can select the inclusion of Short Term Trainees by choosing:

- When..."YEAR Trainee Type (E)"

Is... "Equal To"

The Following... "Short Term"

Fields in the Short Term Trainee mini dataset

Fiscal Year
Name (first, middle, last)
County of Origin: This pull down menu is provided for those Centers interested in capturing data to document the "statewideness" of their outreach and impact. The appropriate list of counties for each state in which the Center is located is provided; the list also includes "unknown" and "out of state" as options.
Date of Birth
Gender
Race
Ethnicity
Personal Relationship with Disabilities

Trainee Years

Overview

The main trainee record contains basic demographic and contact information about the trainee. A separate record for each year that the trainee is in your training program must be created.

Creating a Trainee Year Record for a New Trainee

Once all information is entered in the main trainee record and the *Save* button is clicked, a blank trainee year entry form automatically pops up. That blank form will have the *Fiscal Year* field set to the current fiscal year as a default. Use the drop down menu to select a different year if required. Once the correct fiscal year has been selected and all of the other required data have been entered, hit Save at the bottom of the form.

After the main trainee record and a trainee year record are saved in NIRS, the Trainee List/Edit screen displays each trainee in alphabetical order by last name. Underneath each trainee main record, trainee year records are listed, ordered chronologically.

Creating a Trainee Year Record for an Existing Trainee

There are two ways to add subsequent trainee year records to a main trainee record from the Trainee List/Edit screen:

1. Add feature: Click on the Add button on any year record under the main trainee record. An Add Trainee Fiscal Year form will be displayed that is pre-loaded with the trainee's most recent year's information (if any). Modify any fields that require updating with new information and click the Save button.
2. Save As feature: Click on the View button on any year record under the main trainee record. The click on theSave As button in the upper right hand corner of the screen. Modify any fields that require updating with new information and hit the Save button.

Fiscal Year Numeric

Required Field. The NIRS FY for all data runs from July 1 to June 30. Trainees who begin their training (or training year) any time between July 1, 2012 and June 30, 2013 should be reported under FY2013. Similarly, the Fall 12/Spring 13 academic year would be recorded as the FY13 trainee year.

Note: When adding a trainee year record, the current fiscal year will automatically be displayed in the FY field drop down menu. Be careful to select the appropriate year if the current FY is not intended for the record.

Academic Level Text/Numeric

Required Field. Select the trainee's current enrollment status, **not** the highest degree earned from the pull-down menu. For example, if an MD has enrolled in your MPH program, select Masters because she/he is *currently enrolled in* the master's program. The drop down menu options are:

- Non Degree
- Undergraduate
- Masters
- Doctoral
- Post Doctoral
- Other

Note: Medical students should be designated as "doctoral." Medical residents and fellows should be designated as "post doctoral."

Degree Program Text/Numeric

Required field. Supply the academic degree program that the trainee *is currently enrolled in.* Use the appropriate abbreviation (i.e., MA, MSW, MEd, DDS, MD, PharmD, PhD, DPH, EdD, etc.).

Position in Program Text/Numeric

Centers can use this field to capture the trainee's role in their training program each year (i.e. psychology fellow).

This field differs from the Position at Admission field in that it captures what the trainee's role is in the program, on a yearly basis, rather than their primary position or occupation as they entered the program.

Discipline Text/Numeric

Required Field. Select the trainee's discipline from the drop down menu. If the trainee's discipline is not included in the menu of options, select Other and indicate the discipline in the text box. The discipline drop-down menu consists of:

Audiology
Biological Study
Dentistry-Pediatric
Dentistry - Other
Disability Studies
Education: Administration
Education: Early Intervention/Early Childhood
Education: General Education
Education/Special Education

Epidemiology
Family Member/Community Member
Family Studies
Family/ Parents/ Youth Advocacy
Genetics/Genetic Counseling
Gerontology
Health Administration
Human Development/Child Development
Interdisciplinary
Law
Liberal Arts & Science, Humanities, and General Studies
Medicine-General
Medicine-Adolescent Medicine
Medicine-Developmental-Behavioral Pediatrics
Medicine-Neurodevelopmental Disabilities
Medicine-Pediatrics
Medicine-Pediatric Pulmonology
Medicine - Other
Mental and Behavioral Health
Nursing
Nursing-Family/Pediatric Nurse Practitioner
Nursing-Midwife
Nursing - Other
Nutrition
Occupational Therapy
Pastoral
Pharmacy
Person with a disability or special health care need
Physical Therapy
Psychiatry
Psychology
Public Administration
Public Health
Rehabilitation
Respiratory Therapy
Social Work
Speech-Language Pathology

Current Contact Hours Numeric

Required Field. Enter the actual number of contact hours *for the current reporting period only*. NIRS will auto add the hours across years for trainees. Do **not** supply a range of hours.

> **Note**: The response for this item must be nine or more hours for the current reporting period. If there are fewer than nine hours to report, enter trainee information in the Activities dataset under the field Type Types and Numbers of Participants.These individuals may be captured as Trainees.

F/P Time

Required Field. From the drop down menu, select either Full-time or Part-time to describe the trainee's enrollment status *for the current year*.

Training Start Date Date

Required Field. Supply the trainee's start date for this training/fiscal year in mm/yyyy format.

The training start date refers to the UCEDD/LEND/LEAH/PPC/DBP-specific training program, **not** to any additional training outside of the Center. The start date may or may not coincide with the commencement of other training.

The earliest start date provided, from the trainee's first year record, will auto-fill the Training Start Date Field in the Trainee Main Record.

Training Completion Date Date

Required Field. Supply the trainee's completion date for this training/fiscal year in mm/yyyy format.

The training completion date refers to the UCEDD/ LEND/LEAH/PPC/DBP -specific training program, **not** to any additional training outside of the Center. If the trainee's completion date is not known when their record is being created, enter an estimated training completion date. Modify the record once the training completion date is known. The completion date may or may not coincide with the conclusion of other training.

The latest completion date provided, from the trainee's final year record, will auto-fill the Training Completion Date Field in the Trainee Main Record.

Trainee Type

Required Field for UCEDDs and LENDs. Answer Yes/No to each of the two questions asking whether the individual is: 1) a LEND Trainee and 2) a UCEDD Trainee. Supply information on how a trainee may be classified. These fields are used to query NIRS for progress reports, performance measure, and similar functions. If you intend to report a trainee as both a LEND and a UCEDD trainee, which is perfectly possible, answer Yes to both questions.

To better guide data entry on which trainees have MCH support, starting FY2011, a new question has been added to the year record for UCEDDs and LENDs, and LEAH/PPC/DBP trainees. This question reads: "Does the trainee have MCH support?"

UCEDDs/LENDs: If the answer is Yes to "Is this a LEND trainee?", the user will then be able to select Yes or No to the question "Does the trainee have MCH support?"

LEAHs/PPCs/DBPs: The user will be able to select Yes or No to the question "Does the trainee have MCH support?" If Yes is selected, then dollar amount(s) must be entered for stipend and/or tuition, as applicable, and at least one selection (other than Not Applicable) must be made for Support Type.

Curricula

This optional field tracks the training curricula that apply to the work the trainee is completing. Select Other Otherand indicate the name of the curriculum in the text box if the trainee is completing a curriculum that is not an option. **The curricula being completed may be independent of the trainee's funding source/s.**

- MCH LEND
- ADD
- OSEP
- Pediatric Residency
- Other- Please specify
- Not Applicable

Products Produced by Student

Required field, if applicable. Centers may link products produced by trainees to their trainee records.

Select Link an Existing Product and click GO.

Note: Starting FY12, Product records must be created prior to linking them to a trainee year record. As this field is not required, if the Product is not available in the drop-down menu, you may skip this field, continue to complete the trainee year record as applicable and then save it. After that, you can go to the Products dataset to create a Product record for the Trainee's Product, and then return to the trainee year record and link the newly created product.

Centers may also capture information on Trainee Presentations in their year records. For each substantive presentation by the student, provide the name (title) of the presentation, the date, and the venue (conference, seminar, etc.).

Type of Participation

This optional field tracks the type of training modalities experienced by the trainee during the trainee year record. Check all that apply:

- Didactic involves lecture and textbook instruction rather than demonstration and laboratory study
- Clinical training is concerned with the direct observation and treatment of living patients
- Research studies (something) thoroughly so as to present in a detailed, accurate manner
- Practicum/Field Work is the supervised practical application of previously studied theory
- Other is included to allow for the specification of other types of training

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Support

Required field. Check all categories that apply to describe **any** program-related financial support (i.e., stipend, scholarship, tuition assistance/remission, etc.) that the trainee receives in the *current fiscal year*. If the trainee does not receive any support, then select Not Applicable/None.

Core Grant Funding

- MCH Core
- MCH Autism Supplement
- ADD
- OSEP

Other Funding

- Clinical fees
- Academic Department
- Internship
- Fellowship/Scholarship
- Other

Not Applicable/None

Starting FY2011, the order of Support Types and Support Amounts modules has been reversed on the data entry form and logic added to the fields for cash (or cash-like) support. If Yes is checked to indicate the trainee has MCH support question ("Does the trainee have MCH support?"), users will be required to provide information on stipend and/or tuition/fees.

Added Date Date

Information on **Added Date, Added By, Updated Date,** and **Updated By** is available in the **Creating the Main Trainee Record** section of the Trainee Chapter.

Survey

Survey ID Numeric

NULL

Trainee ID Numeric

NULL

Health Care Needs

1. Health Care Needs of Survey Respondent

Current Status

2. Currently Working in a field related to Maternal & Child Health (MCH)/disabilities/persons with special health care needs

Public Health Org

3. Do you currently work in a public health organization or agency (including Title V)?

Underserved or Vulnerable Populations

4. Does your current work relate to underserved or vulnerable populations?

Primary Employment Text/Numeric

5. Primary type/setting of employment

Primary Employment Oth Text/Numeric

5. Primary type/setting of employment

Individuals Numeric

6. Number of individuals with developmental disabilities receiving direct services through respondents' activities

LEND Recommend

7. Recommend LEND/UCEDD training to others

LEND Recommend Explanation

8. Suggestions for training program curriculum

Academic Leadership

9. Have you participated in academic leadership activities?

Clinical Leadership

10. Have you participated in clinical leadership activities?

Public Health Leadership
11. Have you participated in public health practice leadership activities?

Public Policy Leadership
12. Have you participated in public policy & advocacy leadership activities?

Leadership Position
13. Leadership position in the field of developmental disabilities

Professional Achievement
19. Professional Achievements attributed to training program

Date Last Edited	Date
LEND Enhanced Skills Detail Oth New or enhanced skills as a result of training program.	Text/Numeric
Why Not Current Why Not Currently working in a field related to MCH/disabilities/persons with special health care needs	
Why Not Current Oth Why Not Currently working in a field related to MCH/disabilities/persons with special health care needs	Text/Numeric
Place of Employment Current Place of employment	Text/Numeric
Current Job Position Title Current Job Position/Title	Text/Numeric
Oth Disciplines Work with other disciplines that work with an MCH population	Yes/No
Types Of Activ Types of Interdisciplinary or multidisciplinary activities.	
Types Of Activ Oth Types of Interdisciplinary or multidisciplinary activities.	Text/Numeric
LEND Positive Impact LEND/UCEDD training has positively influenced current career choice and performance	
LEND Enhanced Skills I acquired new or enhanced skills in my LEND/UCEDD training program.	

LEND Enhanced Skills Detail New or enhanced skills acquired or improved as a result of training (detail)	Text/Numeric
Academic Activities Academic leadership since training was completed	
Academic Activities Other Academic leadership since training was completed	Text/Numeric
Academic Activities Geographic Scope Academic leadership geographic scope	Text/Numeric
Clinical Leadership Activ Clinical leadership since training was completed	
Clinical Leadership Activ Oth Clinical leadership since training was completed	Text/Numeric
Clinical Leadership Geo Scope Clinical Leadership Geographic Scope	
Policy Activ Public Health/Public Policy leadership since training was completed	
Policy Activities Other Public Health/Public Policy leadership since training was completed	Text/Numeric
Policy Activ Geo Scope Policy leadership Geographic Scope	Text/Numeric
Advocacy Activ Advocacy leadership since training was completed	
Advocacy Activ Oth Advocacy leadership since training was completed	Text/Numeric
Advocacy Activ Geo Scope Advocacy leadership Geographic Scope	Text/Numeric
Awards Or Recognition Awards Or Recognition received for professional contributions	Yes/No
Awards Or Recognition Areas Awards Or Recognition Areas	

Awards Or Recognition Areas Oth Awards Or Recognition Areas	Text/Numeric
Leadership Activity Leadership Activities attributed to training program	
Highest Degree Highest Degree	
Supervisory Position NULL	Yes/No
How Many Supervised NULL	Numeric
LEND Increased Knowledge NULL	
LEND Positively Influenced NULL	
LEND Facilitated Employment NULL	
LEND Positively Influenced Areas NULL	
LEND Positively Influenced Areas Exp NULL	
LEND Positively Influenced Areas Oth NULL	Text/Numeric
Grants In Past 5 Yrs NULL	Numeric
Education Activ Audience NULL	
Education Activ Audience Oth NULL	Text/Numeric
Education Activ Materials	

NULL

Education Activ Materials Oth NULL	Text/Numeric
Education Activ Geo Scope NULL	
Research Activ NULL	
Articles Authored In Past 5 Yrs NULL	Numeric
Research Activ Oth NULL	Text/Numeric
TA Activ NULL	
TA Activ Oth NULL	Text/Numeric
TA Activ Audience NULL	
TA Activ Audience Other NULL	Text/Numeric
TA Activ Geo Scope NULL	
Administrative Activ NULL	
Administrative Activ Oth NULL	Text/Numeric
Leadership Activ NULL	
Grant Review In Past 5 Yrs NULL	Numeric
Leadership Activ Oth	Text/Numeric

NULL

Activities

Overview of the Activities Dataset

Data collected in the Activities Dataset are intended to be linked to particular projects identified in the Projects dataset. Activities are the individual events or discrete process, pursuits, or functions of a project, and are often clearly measurable. In contrast, the Projects Dataset is intended to record information on on-going initiatives that may encompass multiple activities.

Activity-level reporting can further be distinguished from project-level reporting in that activity records focus more on impact (e.g., number of students trained) of the work than on the infrastructure of any project. **NIRS allows Centers to manage information on the activities performed for each project.** Data collected in the Activities Dataset is linked to particular projects identified in the Projects Dataset.

Descriptive information about each activity is collected in the Activities dataset including:

- The core function that best describes the activity
- The type of activity
- The area of emphasis the activity addresses
- Numbers, types, and demographics of activity participants
- Collaborators on the activity
- Projects the activities are affiliated with
- Duration and dates of activity

Note: If an Activity Record is to be linked to a Project Record, the Project Record must be created prior to creating Activity Record.

Working in the Activities Dataset

Adding, Listing, Searching, Saving As, Viewing, Editing, and Deleting Data in the Activities Dataset

Creating Activity Records

To create a new activity record, choose the Add Activity option from the Activity pull-down menu located on the top navigation bar. An Add button with the same functionality is also located on the Welcome screen or on any of the Activity Search, List/Edit, and View screens. Clicking on the Add button will provide a blank activity data entry formlist all the core functions. Click on Add to the left of the core function for which you want to add a record. In FY 2013, to better accommodate the data entry needs of all Programs that use NIRS, Activity data entry forms have been customized: when adding a new Activity record, the user must now first select the Core Function, then the Program Type (this step is skipped for UCEDD-only, LEND-only, LEAH, PPC and DBP Centers), and based on the choices made, the Add Activity form will open up with only the relevant fields to complete. This will eliminate the need to complete fields not required for an Activity's Program Type, or keeping track of what fields to complete for each Core function.E Enter all of the data in the Activity form and click on the Save button.

Listing Records

The Activity List/Edit screen displays each activity record in the current fiscal year in alphabetical order by title. The list of activities can be sorted by

- The date of the activity by clicking on Date
- The date the records were added by clicking on the Date Added
- The date the records were last edited by clicking on Edited
- Reverse **alphabetical order** by clicking on Title

Note: In FY10 a Jump to alphabet character feature was added to the header of the Activity search queries (the returned character will be the first letter of the title).

The List/Edit function displays only those activity records for the current fiscal year. To display other activity records in anotherfrom a previous year or multiple years, use the Search function.

Searching Records

The Activity Search screen displays options by which the Activity dataset may be searched. The fiscal year pull down menu may be used to select records from a particular year, or all Activity Records may be searched if All Years is selected from this menu.
Beginning in FY07, a multi year button can be used to identify multiple years to search. To select multiple years, choose the fiscal year from the pull down menu, then click the multi year button. Continue until all desired fiscal years are included. To delete a year from the search, simply click on the number (i.e. 2004). Note: Records from all the selected years will be displayed in the search results.

Saving Past Activity Records into a New Fiscal Year (the Save As Function)

Many projects span multiple years, however NIRS requires a separate Project Record (and thus Activity Records) for each year. To create a new fiscal year Activity Record for a multiyear project, first find the activity using the List/Edit or Search functions. Second, click on the View button to display the Activity Record. Third, click on the Save As button in the upper right corner of the screen. An Activity Record entry form, pre-filled with the activity information, will be displayed. Modify this form as necessary for the current fiscal year and click Save.

Changing the Activity Core Function

If an Activity is accidentally added with the incorrect Core Function, then it is very easy to fix it:

- Search for the respective Activity
- Click on the View button to its left
- From the New Core Focus drop-down menu, select the correct Core Function
- Click on Save As just beneath the drop-down menu
- The Activity form opens up with the appropriate fields for the newly selected Core Function. All fields that applied to the initial Core Function as well, are pre-filled with data previously entered. Complete all the required fields for the current Core Function and save the record.
- Search the original Activity, with the incorrect Core Function, and delete it - this does not happen automatically.

Viewing Records

To view an Activity Record, begin on the List/Edit screen. Click on the View button beside the intended record.

Editing Records

To edit an Activity Record, begin on the List/Edit screen. Click on the Edit button beside the intended record. Once all changes have been made to the record, click Save.

Deleting Records

The Del button is used to delete records. It is available in the List/Edit and View screens. Click on the Del button to delete an activity record.

Program Type

Required Field. Check all that apply. If the activity involves both LEND and UCEDD funding, faculty, staff, or other resources, check both of the boxes.

Fiscal Year Numeric

Automatically Defined Field. The FY for all data is July 1 to June 30. The FY is automatically assigned when the Activity Record is created.

Activity Title Text/Numeric

Required Field. Supply the activity's title (up to 150 characters) in the text box. For instances when an activity does not have an official title, select No Title.

To be useful, activity titles should be as descriptive as possible. For example, instead of Training, provide a more descriptive title such as "September In-service Training for Occupational Therapists in Johnson County."

Brief Description

Supply a brief description of the activity (up to 50 words) being reported in this record (e.g., location, staff members involved, topic/s covered, what took place). Information provided in this field is critical to the search features of the AUCD web-portal, NIRS Search, and other linked search engines.

Along with the information entered in the Title of Activity field, the information in this field will help identify one activity record from another.

Staff Involvement

NIRS allows Centers to track activities by staff involvement, if desired. Information supplied in this field can be accessed with the NIRS search and custom reports functions.

The ability to add, modify, or delete staff names in the Staff Involvement pull down menu has been restricted to individuals with an Admin level of access to NIRS at each Center. This change was implemented in FY06 in response to network requests for greater control over list modifications and problems with duplication of staff within the lists. As a result of this change in access, any modifications to staff names (spelling, name changes, etc.) for a given fiscal year will be automatically reflected throughout that year's dataset.

If the staff person you want to select is not listed in the pull-down menu, continue entering relevant information in all other fields, and click the Save button. This will take you back to the main menu. If your access level is Admin, then you can see the Admin menu on the navigation bar. From the Admin menu, select Activity Staff. Click on the Add button or Add New Activity Staff. Type in the staff's name and click Save. The new name will now be included in the Staff Involvement pull-down menu in the Add Activity screen. To assign an activity to the new name, locate the desired activity record, using the Search or List/Edit options in the Activities menu, click on Edit, and follow the steps described below.

Identifying Staff in the Activity Record

The first line of the Staff Involvement pull down menu is intentionally blank. Select staff name(s) from those already in the Center's Staff Involvement pull down menu by first clicking on the desired name and then clicking on the Link this Person to the Activity button. Selected names will appear in the Staff Involved in the Activity text box below. Or, enter new names as described below.

There may be instances where you might wish to enter staff names that are not in the pull-down menu (e.g., when you want to note the involvement of a staff member who has left the Center, faculty who are not part of your Center, etc.). In this situation, just type the name directly into the larger Staff Involvement text box.

Note: When staff names are entered through the text box, they will be not be available through the Staff Involvement field in the Search and Custom Reports functions; however, they will be available for searching through the Keyword search field.

Removing Staff Names from the Activity Record
Highlight the name in the Staff Involved in the Activity text box and hit the Del key on your keyboard. Click on the activity record's Save button to save the change and leave the record.

Core Function

Required Field. **Only one category may be selected per Activity record.** In contrast, multiple core functions may be selected for Project records.

Starting FY 2013, the Core Functions were re-named and re-organized per the 2012 UCEDD Logic Model. Below are the current Core Functions and their definitions. In FY 2018, the Information Dissemination core function was renamed to align with the MCHB performance reporting language and definitions.

1. Interdisciplinary Preservice Preparation (Training Trainees)
2. Continuing Education/Community Training
3. Technical Assistance
4. Direct Clinical Services/Model Services
5. Other Direct/Model Services
6. Demonstration Services
7. Performing Research or Evaluation
8. Product Development and Information Dissemination

1. **Interdisciplinary Pre-Service Preparation (Training Trainees)**

   UCEDDs: Instructional program offered by the UCEDD that: (1) integrates knowledge and methods from two or more distinct disciplines; (2) integrates direct contributions to the field made by people with disabilities and family members; (3) examines and advances professional practice, scholarship and policy that impacts the lives of people with developmental and other disabilities and their families; (4) is designed to advance an individual's academic or professional credentials; and (5) takes place in an academic setting or program.

   It may: (1) lead to the award of an initial academic degree, professional certificate, or advanced academic credential; and (2) contribute to a discipline-specific course of study offered by the UCEDD or by another academic department.

   Pre-service preparation training(s) may be conducted outside the UCEDD, when UCEDD faculty teaching guest lecture(s) and course(s) of study in academic programs outside of the UCEDD training programs with the purpose of providing disability-related content.

   Some of the new output measures in the 2012 UCEDD Logic Model are Number of UCEDD interdisciplinary training programs and Number of UCEDD discipline specific training programs. The Interdisciplinary pre-service preparation activities will be designated as interdisciplinary or discipline-specific based on the selection made for the field Discipline of Course or Class. UCEDD discipline specific training is defined as instructional program offered by the UCEDD that: (1) focuses on a particular professional discipline or distinct field of study; (2) integrates direct contributions to the field made by people with disabilities and family members; (3) examines and advances professional practice, scholarship and policy that impacts the lives of people with developmental and other disabilities and their families; (4) is designed to advance an individual's academic or professional credentials; and (5) takes place in an academic setting or program.

LENDs, LEAHs, PPCs, DBPs
: You may use this to track training activities for long, medium or short-term trainees.

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2. **Continuing Education/Community Training**

UCEDDs
:

- Continuing Education: Seminar(s) or courses of instruction offered by a UCEDD that: (1) serve to maintain professional credentials; (2) encourage professionals to expand their knowledge base and stay up-to-date on new developments; and (3) offer certificates of completion or CEUs (or their equivalents).
- Community Training: Training provided by UCEDD faculty/staff to enhance knowledge of a variety of community members (individuals with developmental and other disabilities, their families, professionals, paraprofessionals, policy-makers, students or others in the community).

Activities will be categorized as Continuing Education or Community Training based on the response to the question "Are continuing education credits offered? " , which already exists in NIRS:

- Yes = Continuing Education
- No = Community Training

LENDs, LEAHs, PPCs, DBPs: Use this for tracking CE activities needed to complete the Continuing Education Form and PM #59. Continuing Education is defined as continuing education programs or trainings that serve to enhance the knowledge and/or maintain the credentials and licensure of professional providers. Training may also serve to enhance the knowledge base of community outreach workers, families, and other members who directly serve the community.

- **Technical Assistance**

UCEDDs: Direct problem-solving services provided by UCEDD faculty/staff to assist programs, agencies, or other entities in improving their outcomes, services, management, and/or policies. This includes TA provided to self-advocacy organizations, famly support groups, and other organizations. Examples of improvements include, but are not limited to:

- Enhanced resources
- Enhanced services
- Strengthened networking of public and private entities across communities
- Increased awareness of evidence-based practices
- Enhanced capacity to assess current practices in relation to evidence-based approaches
- Identification of policy changes needed within the area of emphasis

LENDs, LEAHs, PPCs, DBPs: use this for tracking TA activities needed to complete the Technical Assistance/Collaboration Form and Performance Measure Training 04 (formerly PM #59). Technical Assistance/Collaboration refers to mutual problem solving and collaboration on a range of issues, which may include program development, clinical services, collaboration, program evaluation, needs assessment, and policy & guidelines formulation. It may include administrative services, site visitation and review/advisory functions. Collaborative partners might include State Title V or local health agencies, and education or social service agencies. Faculty may serve on advisory boards to develop &/or review policies at the local, tribal, State, regional, national or international levels. The technical assistance (TA) effort may be a one-time or on-going activity of brief or extended frequency.

• **Direct Clinical Services/Model Services**

UCEDDs: Specialized clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions. Includes direct problem-solving services provided to assist individuals with developmental and other disabilities and their families. Examples may include, but are not limited to: an autism screening and diagnostic clinic, or direct clinical services such as PT, OT, or SLT.

LENDs, LEAHs, PPCs, DBPs: may be used for tracking Direct Health Care Services.

Note: When the Core Function is Direct Clinical Services/Model Services, Direct Service will automatically be selected in the Type of Activity field instead of one of the three standard options (Advocacy, Capacity Building, or Systemic Change). The Direct Clinical Services/Model participant demographics form collects aggregate information on the total number of unduplicated individuals served. It is intended for those individuals (a) who receive direct clinical services from the center faculty, staff, or trainees; (b) over whose individual treatment charts the center has control; and (c) for whose chart the center is legally responsible for maintaining information.

Centers should complete one record in the Activity Dataset for each clinic. If it has more than one clinic, a center may have multiple Direct Clinical Services/Model Services activity records each reporting year. It is understood that within one physical location, there could be multiple individual clinics that provide different services that are funded through different sources, in which case the Center would need to determine how it is going to define "clinic" for the purposes of entering data (i.e., one clinic per record or multiple activity records for multiple clinics) and how the Clinic Name field is completed.

For the Number of unduplicated individuals served, record the total number of individuals who receive direct clinical services at a particular clinic for a full reporting period. For UCEDDs, this is the Initial Outcome Measure: Number of individuals who receive specialized services from the UCEDD to enhance the well-being and status of the recipient.

For the Race/Ethnicity fields, provide information related to the total number of individuals who received direct clinic-based services from the faculty/staff of a center clinic for a full reporting period.

For the Age fields, provide age range information related to the total number of individuals who receive direct clinical services from a particular clinic for a full reporting period.

• **Other Direct/Model Services**

All Programs: Specialized non-clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions. Other Direct/Model Services may include direct activities related to quality assurance, education and early intervention, child care, health, employment, housing, transportation, recreation, or any other care, services or supports provided directly to individuals with developmental disabilities and/or their family members. Examples include:

- Training or educating individuals with developmental disabilities and their family members.
- Providing therapeutic child care, or other direct services to individuals with a developmental disability and their family members.

- Providing technical assistance directly to individuals with developmental disabilities and their family.
- Conducting research that includes a direct service component or intervention with individuals with developmental disabilities and their family members as subjects.
- Supervising professionals, para-professionals, or students who are providing direct services to individuals with developmental disabilities and their family members.

Note: When the Core Function is Other Direct/Model Services, Direct Service will automatically be selected in the Type of Activity field instead of one of the three standard options (Advocacy, Capacity Building, or Systemic Change).

Note: For UCEDDs, the Number of unduplicated individuals served is the Initial Outcome Measure: Number of individuals who receive specialized services from the UCEDD to enhance the well-being and status of the recipient.

- **Demonstration Services**

All Programs: Services that field test promising or exemplary practices and may be integrated with training, research, and/or dissemination functions.

A field test is defined as a test to examine a promising or exemplary service technique or method using the conditions under which it is designed to operate (can be thought of as applied research).

Demonstration Services may include a variety of services, supports, and assistance for individuals with disabilities or special health care needs, their families, professionals, paraprofessionals, policy-makers, students, and other members of the community. These services could be related to a wide array of areas, such as education, child care, health, employment, housing, transportation, recreation, and other areas.

The Demonstration Services (including consults) participant demographics form collects aggregate information on total services, consults/contacts conducted by Center personnel outside of their own clinics.

- For the Number of Services, Consults, or Contacts field, record the total number of community-based services, consults, or contacts provided Center faculty/staff for a full reporting period.
- For the Race/Ethnicity fields, provide information related to the total number of consults/contacts made in the community by faculty/staff of a Center for a full reporting period. This means that, if one individual who is Asian is seen four times, four should factor into the total number of Asian individual consults/contacts, not one.
- For the Age fields, provide age range information related to the total number of consults/contacts made in the community by faculty/staff of a Center for a full reporting period. Again, that means that, if a individual who is over 55 years old is seen six times, six should factor into the total number of 55+ individual consults/contacts, not one.

Note: Since the Demonstration Services (including consults) participant demographics form counts the total number of services, consults, or contacts (versus the total number of individuals, as the Direct Clinical Services/Model Services form does), the number supplied may exceed the total number of individuals actually seen. For example, one individual may be seen 10 times out in the community, which would make the total number of consults/contacts that is supplied in the data form higher than the total number of individuals actually seen.

Beginning in FY07, you may also provide an unduplicated count of individuals who received consult services.

- **Performing Research or Evaluation**

All Programs: Implementation of basic and applied research, program evaluation, and analysis of public policy on issues impacting individuals with developmental disabilities.

Basic Research is defined as research with the purpose to extend knowledge by adding to the existing body of knowledge in the discipline. Such research has a more general orientation.

Applied research is defined as research with the purpose to solve an immediate, practical problem. Such research is oriented to a particular problem.

Evaluation is utilized to assess the merits of a product, program, or practice. The application of results is at a given site or sites and this is the primary focus of the evaluation. Evaluation results aid in decision making in a specific situation.

The analysis of public policy is a process that usually begins with problem definition, yields alternatives, and makes recommendations.

- **Product Development and Information Dissemination**

All Programs: Distribution of knowledge-based information through UCEDD developed products and activities.

Information development and dissemination equip Centers to serve as a resource to various constituents on a local, regional, state, national, and international scope, through the provision of specific substantive areas of expertise that may be accessed and applied in diverse settings and circumstances. Information development and dissemination might include product dissemination, public awareness projects, and other types of initiatives.

Linking Products

If the activity involves Product Dissemination, a product must be linked to the Activity Record and product information supplied. The Activity dataset links with the Product dataset to capture product dissemination information. To capture dissemination information in NIRS, first an activity record must be created and then a new or existing product must be linked through the Product Development and Information Dissemination core function option. After a product is linked to an Activity record, dissemination data entry fields will appear in the Product record.

Dissemination data entry fields are not accessible for Product Records that are not linked to an Activity Record.

Beginning with FY08, Activity Records may only be linked to an existing Product Record. (Prior to FY08, users could create a Product Record from the Activity dataset, but this feature has been disabled.

To link a product record, select a product from the Link an Existing Product drop down menu of products. Highlight the selected product and click GO! button to display the product record. Edit the record as necessary and click on the Save button. See the Products chapter for information on how to complete Product records.

Training Method

The Training Method pull-down menu consists of the following options:

- Presentation/Seminar: use for teaching a class within a larger course or teaching a single seminar for students other than your Center's trainees, or for giving a presentation to other audiences (professionals, providers, families, etc.).
- Workshop/Conference: use for workshop, concurrent, keynote, or other presentation in a conference setting.
- Web-based Course: use for teaching an entire web-based course for students other than your Center's trainees.
- Audio Conference: use for training delivered via teleconference or audio conference technology.
- Video Conference: use for training delivered via videoconference technology.
- In person or live course: use for teaching an entire course, live and in person, for students other than your Center's trainees.
- Other: use when none of the above categories are appropriate.

Training Type

The Training Provision pull-down menu consists of the following options:

- in person
- distance
- mixed

Continuing Education Credit

Activities will be categorized as Continuing Education or Community Training based on the response to this question.

- Yes = Continuing Education
- No = Community Training

Training Target Audience

The options for Training Target Audience are:

- Local
- Title V
- Within State
- Tribes
- Another state
- Regional
- National
- International

Ethnicity of Consult. served: Unrecord	Numeric

Ethnicity of individuals served: Unrecorded	Numeric

Type of Activity

Required Field. Select one of the Type of Activity categories (i.e., Advocacy, Capacity Building, or Systemic Change) for each Activity reported in NIRS. Only one action type may be selected for each activity in the Activities dataset. In contrast, the Project dataset allows for the selection of multiple activity types because projects typically encompass multiple activities.

Activity Type Definitions:

- Advocacy: active support for a program, initiative, or change.
- Capacity Building: strengthening local, state, regional, and national communities.
- Systemic Change: modifying entire programs, policies, services, and/or funding streams.

Note: When the core function is Direct Clinical Services/Model Services or Other Direct/Model Services, Direct Service will automatically be selected in the Type of Activity field, instead of one of the three standard options (Advocacy, Capacity Building, or Systemic Change).

Areas of Emphasis

Required Field. Select one.

Areas of Emphasis listed in the DD Act

Quality assurance *activities:* The term quality assurance activities means advocacy, capacity building, and systemic change activities that result in improved consumer- and family-centered quality assurance and that result in systems of quality assurance and consumer protection that

- Include monitoring of services, supports, and assistance provided to an individual with developmental disabilities that ensures that the individual (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights; and (b) will not be subject to the inappropriate use of restraints or seclusion;
- Include training in leadership, self-advocacy, and self-determination for individuals with developmental disabilities, their families, and their guardians to ensure that those individuals (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights; and (b) will not be subject to the inappropriate use of restraints or seclusion; or
- Include activities related to interagency coordination and systems integration that result in improved and enhanced services, supports, and other assistance that contribute to and protect the self-determination, independence, productivity, and integration of individuals with developmental disabilities and their inclusion in all facets of community life.

Education and early intervention *activities:* The term *education activities* means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities being able to access appropriate supports and modifications when necessary, to maximize their educational potential, to benefit from lifelong educational activities, and to be integrated and included in all facets of student life. The term *early intervention activities* means advocacy, capacity building, and systemic change activities provided to individuals and their families to enhance (a) the development of the individuals to maximize their potential; and (b) the capacity of families to meet the special needs of individuals with developmental disabilities.

Child care-related *activities:* The term child care-related activities means advocacy, capacity building, and systemic change activities that result in families of children with developmental disabilities having access to and use of child care services, including before-school, after-school, and out-of-school services, in their communities.

Health-related *activities:* The term health-related activities means advocacy, capacity building, and systemic change activities that (a) enhance awareness, change behavior, or create environments that support good health practices and (b) result in individuals with developmental disabilities having access to and use of coordinated health, dental, mental health, and other human and social services, including prevention activities.

***Employment-related** activities:* The term employment-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities acquiring, retaining, or advancing in paid employment, including supported employment or self-employment, in integrated settings in a community.

***Housing-related** activities:* The term housing-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of housing and housing supports and services in their communities, including assistance related to renting, owning, or modifying an apartment or home.

***Transportation-related** activities:* The term transportation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of transportation.

***Recreation-related** activities:* The term recreation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of recreational, leisure, and social activities, in their communities.

Areas of Emphasis not listed in the DD Act

Quality of life activities: The term *quality of life* activities means activities that support individuals in their efforts to practice greater self-determination and consumer- and family-focused planning; exert greater choice and control in their lives; effect their full inclusion and participation in the community; and increase their general satisfaction with and access to services and supports.

***Other**:* If *other* is selected as an area of emphasis, the following sub-options are available:

- **Other--Assistive Technology**. This option applies to any project that assists an individual with a disability and their family/caregivers in the selection, acquisition, or use of an assistive technology device.
- **Other--Cultural Diversity**. This option applies to any project that provides or focuses on the provision of services, supports, or other assistance that is conducted or provided in a manner that is responsive to the beliefs, interpersonal styles, attitudes, language, and behaviors of individuals who are receiving the services, supports, or other assistance, and in a manner that has the greatest likelihood of ensuring their maximum participation in the program involved.
- **Other--Leadership**. This option applies to any project that enhances the potential of health care, allied health or related personnel to improve the health, developmental or functional status of children and adults with disabilities and equips personnel with the knowledge and skills required to enhance the systems of care and support for people with disabilities and their families.
- **Other--please specify**. If this option is selected, provide explanatory text in the text box.

Types & Numbers of Participants

Required Field. For each category of participant, supply the number of participants in the corresponding box. Supply information on those who are the recipients of the activity (e.g., as trainees, audience members, recipients of technical assistance, research subjects, and others).**Do not** include staff or consultants who provided the activities (e.g., in the capacity as trainers, presenters, providers of technical assistance, researchers, etc.).

Identify participants in their primary role as related to the activity and do not double count them under more than one type of participant. For example, a seminar designed for social workers may include participants who, in addition to being social workers, are also a family member of a person with a disability. However, because those participants attended this seminar primarily in their role as social workers, they should be counted only **once** under Professionals & Para-Professionals.

Note: The term Participants in the Activity dataset does not mean Target Audience. The term Target Audience is used in the Project dataset. Two different terms are used to capture two different data elements.

The Target Audience data, captured on the project level, is the intended or anticipated audience of the project. Only descriptors of the Target Audience are required (students/trainees; professionals and para-professionals; family members, caregivers, persons with DD, or children with SHCN; not applicable; and other) in the Project dataset; target numbers for those audiences cannot be supplied.

Actual Participant data is captured on an activity level. In the Activity dataset, the actual numbers of Participants are to be provided in the text boxes next to the descriptors.

The two types of data--Target Audience and actual Participants--may or may not be the same. For example, a multi-year project may target different participants each year of the project. In that case, the project record would indicate multiple audiences (since it covers the entire project period), only one of which were actual participants in the project's activities during the current reporting period.

Note: The total number of participants is automatically calculated in the Total Participants field at the bottom of the Types and Numbers of Participants based on the numbers entered in the participant options. Any changes to the participant numbers in any category will cause an automatic recalculation of the figure in the Total Participants field.

Participant Categories

- Trainees (long, intermediate, and/or short-term trainees)
- Other Classroom Students
- Professionals & Para-Professionals
- Family Members/Caregivers
- Adults with Disabilities (aged 22 and above)
- Children/Adolescents with Disabilities/SHCN (up to age 22 years)
- Legislators/Policy Makers
- General Public/Community Members

Trainees

For most categories, only the total number of participants is required. However, when the core function is Interdisciplinary Preservice Preparation (Training Trainees) and the Program type is UCEDD, additional information must be supplied for the category Trainees: the breakdown of Trainee Disciplines, as well as the Discipline of the course or class.

Other Classroom Students

This category is for students who are not registered with a Center's training program but who participate in an activity of the training program on a limited basis. Examples include high school students, college students, and other students who participate in Center activities but are not counted as trainees.

Professionals participating in UCEDD continuing education programs are defined as practitioners engaged in a particular profession enrolled in a UCEDD continuing education program.

Collection of Discipline Demographics on Trainees

The categories include only those discipline categories that are required by MCHB/AIDD and categories that have been specifically requested by the network. Click here for the definitions of some of the following disciplines:

Audiology
Biological Sciences

Dentistry-Pediatric
Dentistry-Other
Disability Studies
Education/Special Education
Education: Administration
Education: Early Intervention/Early Childhood
Education: General Education
Epidemiology
Family Studies
Family/Parent/Youth AdvocacyGenetics/Genetics Counseling
Gerontology
Health Administration
Human Development/Child Development
Interdisciplinary
Law
Liberal Arts & Sciences, Humanities, & General Studies
Medicine-Adolescent Medicine
Medicine-Developmental-Behavioral Pediatrics
Medicine-Neurodevelopmental Disabilities
Medicine-Pediatric Pulmonology
Medicine: General
Medicine: Pediatric
Mental and Behavioral Health
Nursing
Nursing-Family/Pediatric Nurse Practitioner
Nursing-Midwife
Nursing-Other
Nutrition
Occupational Therapy
Other
Pastoral
Pharmacy
Physical Therapy
Psychiatry
Psychology
Public Administration
Public Health
Rehabilitation
Respiratory Therapy
Social Work
Speech-Language Pathology

Partic. Other Classroom Students	Numeric
Participant Student Disc Nursing-Midwife	Numeric
Participant Student Disc Dentistry-Pediatric	Numeric
Participant Student Disc Epidemiology	Numeric

Participant Student Disc Gerontology	Numeric
Participant Student Disc Family Studies	Numeric

Customer Satisfaction

This section is only relevant to UCEDDs. LEND, LEAH, PPC, DBP and SDHG Programs are not required to use this function.

In response to feedback from the network, the data entry screen uses the intuitive label of customer; however, data entered here will be displayed in standard reports with the actual ADD designation of consumer.

The AIDD annual report template calls for the submission of consumer satisfaction data across all core functions--except research--in one area of emphasis. Consumers are defined by AIDD as the customer to whom a service or product is designed for and delivered to. Therefore, your trainees are consumers.

AIDD expects UCEDDs to adhere to a minimum 30% response rate - in aggregate - within a core function on an annual basis.

Beginning with the FY10 dataset, AIDD expects UCEDDs to survey a sample of their website users to determine their satisfaction with their website as a delivery mechanism.

Activity Lead

Indicate using the Yes/No pull down menu if the Center is the lead (overall responsibility or leadership) on the activity. Guidance from ADD indicates that Centers are not obligated to collect satisfaction data on activities that they do not lead (e.g., speakers at conferences not hosted by the Center are not expected to collect satisfaction data on their presentations). Beginning with the FY08 dataset, this information was used to populate the UCEDD annual report function in NIRS.

Number Surveyed

Indicate the number of customers surveyed. Beginning in FY08, this information will be used to calculate response rate and will populate the annual report function.

> **Note**: If the Number Surveyed is higher than the Number of Participants, then an error message will pop-up, prompting you to correct the figures so that Number Surveyed is less than or equal to Number of Participants.
>
> Number of Participants = TOTAL PARTICIPANTS, for Activities with the Core Function of Training Trainees or Performing Technical Assistance and/or Training
>
> Number of Participants = Number of individuals seen, for Activities with the Core Function of Performing Direct and/or Demonstration Services, sub-category Direct Clinical Services
>
> Number of Participants = Number of unduplicated individuals to whom the above services were provided, for Activities with the Core Function of Performing Direct and/or Demonstration Services, sub-category Other Direct or Demonstration Services (including consults)

Satisfaction

There is one customer satisfaction question per core function (except research).

You may record the total number responding to each of these options in four corresponding numeric fields. The fields allow 9 digits without commas and entries are automatically added into a fifth total field below.

The satisfaction questions for each core function are:

Interdisciplinary Pre-Service Preparation (Training Trainees)

I am satisfied with the knowledge and skills gained from the training. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Continuing Education/Community Training

I am satisfied with the training and/or technical assistance received. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Technical Assistance

I am satisfied with the training and/or technical assistance received. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Direct Clinical Services/Model Services

I am satisfied with the services received. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Other Direct Services/Model Services

I am satisfied with the services received. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Demonstration Services

I am satisfied with the services received. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Research

Not applicable.

Product Development and Information Dissemination

UCEDDs will measure consumer satisfaction on the information available on the UCEDD's main website using the question below. For more details, please check the AIDD Revised Guidance on Consumer Satisfaction for Information Dissemination (also available on the NIRS Resources page).

How satisfied are you with the information on the website? (select one)

- Very satisfied (4)
- Satisfied (3)
- Somewhat satisfied (2)
- Not at all satisfied (1)

Initial Outcome Measure

This field was added in FY 2013, and it is very similar to the Customer Satisfaction Measure, but the statements differ. When collecting data for these measures, UCEDDs may revise the language used when presenting these questions to participants or recipients of training, TA, or services. This field is required only for UCEDD Programs, but it includes the "Not Applicable" option for Activities to which it does not apply. Below are the statements for each Core Function.

Interdisciplinary Pre-Service Preparation (Training Trainees)

As a result of this training, my knowledge of ...(insert training topic) has increased. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Continuing Education/Community Training

Note: This question is only for recipients of regular, on-going trainings, which are defined as trainings 1) conducted with a cohort of participants over a series of sessions and/or 2) one-time trainings that reoccur with regular frequency.

As a result of this training, my knowledge of ... (area of emphasis or training topic in area of emphasis) increased. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Note: The question above is only for Activities with the core function of Community Training. If the core function is Continuing Education, then no Initial Outcome Measure needs to be collected. Check the boc for Not Applicable to skip entering Initial Outcome Measure data for Continuing Education Activities.

Technical Assistance

Note: Only one of the questions below (as applicable) is to be asked of TA recipients that have a sustained relationship with the UCEDD. A sustained relationship is defined as on-going frequent, with more than 3 contacts per year (see field Intensity of TA).

This technical assistance has enhanced the resources I provide. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

This technical assistance has enhanced the services I provide. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

This technical assistance has strengthened networking of public and private entities across communities I am engaged with. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

This technical assistance has increased awareness of evidence-based practices. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

This technical assistance has enhanced my capacity to assess current practices in relation to evidenced-based approaches. (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

This technical assistance has helped me identify changes needed within the ... (areas of emphasis). (select (select one)

- Strongly agree (4)
- Agree (3)
- Disagree (2)
- Strongly disagree (1)

Direct Clinical Services/Model Services

No question. The Initial Outcome Measure is the "number of individuals who received specialized services from the UCEDD to enhance the well being and status of the recipient." This is already collected in the field Number of individuals served.

Other Direct Services/Model Services

No question. The Initial Outcome Measure is the "number of individuals who received specialized services from the UCEDD to enhance the well being and status of the recipient." This is already collected in the field Number of individuals served.

Demonstration Services

No question in the Activity record. The question for this Core Function will be implemented and will have to be answered directly in the Annual Report. (The question is: 'Has UCEDD and/or partnering agency adopted findings from field test to make at least one modification to the UCEDD services being field tested? Please provide examples.")

Research

No question in the Activity record. The question for this Core Function will be implemented and will have to be answered directly in the Annual Report. (The question is: "Has the UCEDD adopted research findings by modifying activities in the other Core Functions? Please provide examples.")

Product Development and Information Dissemination

None.

Participant Student Disc Medicine-Adolescent	Numeric
Participant Student Disc Medicine-Development	Numeric
Participant Student Disc Medicine-Neurodevelo	Numeric
Participant Student Disc Medicine-Ped. Pulmon	Numeric
Participant Student Disc Nursing-Family/Pedia	Numeric
Participant Student Disc Nursing-Other	Numeric
Participant Student Disc Pharmacy	Numeric
Participant Student Disc Respiratory Therapy	Numeric
Partic. OTHER, Discipline name	Text/Numeric
IOM: Total Number surveyed	Numeric
IOM: Strongly Agree	Numeric
IOM: Agree	Numeric
IOM: Disagree	Numeric
IOM: Strongly Disagree	Numeric
IOM: Total Number Responding	Numeric
IOM: Not Applicable	Numeric

Are certificates of compl.or CEUs offered?

Was Training Outside UCEDD	Numeric

Collaborating Agencies

Required Field. Check all categories that apply. A text box is provided to specify the actual name of the agency(ies). The specification of agency name(s) is optional.

> **Note:** In FY 2013, the list of options was been extended, and is now the same with the one in the *Collaborating Agency* field in the Projects dataset. A large or multi-year project may have different collaborators for different activities or at different stages of the project, so all collaborators are identified in the project record. In contrast, activities have a typically smaller number of collaborators.

In FY 2013, the field Primary Agency Collaborating/Recipient of TA was added for MCHB Training Programs. It is a drop-down menu, and the options are the same with those in the checkbox list under Agencies Collaborating on the Work of the Activity. The Primary Agency Collaborating field is a single-choice field to match the MCHB reporting requirements. For UCEDD/LEND records, the option selected fro Primary Agency Collaborating will automatically be selected in the checkbox list as well.

Collaboration is conceptualized broadly to include any substantial interaction on an activity or project, even if a formal memorandum of agreement is not signed between organizations/agencies. Information on collaboration is collected in both the Project and Activity datasets. **Collaborating agencies may or may not be the same as funding sources, which are captured in the Projects dataset.**

> **Note:** Of particular interest are collaborations with State Title V Agencies, MCHB-funded programs, Developmental Disabilities Councils, Protection & Advocacy Agencies, and UCEDDs.

Prim. Agency Collab. on the Work of the Activ	Text/Numeric
Collaborating State Health Dept.	Text/Numeric
Collaborating Clinical Programs/Hospitals	Text/Numeric
Collaborating State Adolecent Health	Text/Numeric
Collab. Health Insurance/Managed Care Org.	Text/Numeric
Collaborating Medicaid	Text/Numeric
Collab. Childcare/Early Child./Part C Inf.& T	Text/Numeric
Collaborating Head Start/Early Head Start	Text/Numeric
Collab. State/Loc. Special Education (3-21)	Text/Numeric
Collaborating State/Local General Education	Text/Numeric

Collab. Post Secondary Ed. (Com.College-Unive	Text/Numeric
Collab. Employment/Voc Rehab	Text/Numeric
Collab. State/Local MR/DD Agency or Provider	Text/Numeric
Collaborating State/Local Social Services	Text/Numeric
Collaborating Aging Organization	Text/Numeric
Collaborating Health Agency - Public/Private	Text/Numeric
Collab. Mental Health/Substance Abuse Agency	Text/Numeric
Collaborating Housing Agency/Provider	Text/Numeric
Collaborating Recreation Agency	Text/Numeric
Collaborating Transportation Agency	Text/Numeric
Collaborating Provider Organization	Text/Numeric
Collab.Consumer/Advocacy Organization	Text/Numeric
Collaborating State/Local Coalition	Text/Numeric
Collaborating Legislative Body	Text/Numeric
Collaborating Justice/Legal Organization	Text/Numeric
Collaborating Community or Faith-Based Org.	Text/Numeric
Collaborating National Association	Text/Numeric
Collab. Independent research or policy org.	Text/Numeric
Collaborating Foundation	Text/Numeric
List A	Text/Numeric

List B

List B Other Text/Numeric

Intensity of TA Text/Numeric

Focus Train (

Primary Project

Data collected in the Activities Dataset is intended to be linked to particular Project Records. Activities are the individual events or discrete process, pursuits, or functions of a project, and are often clearly measurable.

To link an activity to a project, the Project record should be created *prior to* linking it to an activity record. From the pull-down menu, select a Primary Project to link to the activity.

The pull-down menu is populated with all project titles (and corresponding project codes) that have been entered in the Project dataset, including projects for which No Title was selected but a project code was supplied.

For an activity that is primarily affiliated with a project that has not yet been entered through the Project dataset or is not based at a Center, a new Project record may be initiated by selecting Add Primary Project and, then, specifying the project title and code in the space provided. This will create an incomplete Project record that must be completed. We don't recommend creating a Project Record this way, but if you must, *please complete any new Project Records created this way immediately after saving the completed the Activity Record.*

> **Note:** Beginning in FY06, for your convenience, the activity title(s) are displayed at the bottom of their affiliated Project Records.

Secondary Project

Each activity may be linked to a maximum of two projects. Given this limitation, Centers must select which Projects to link each activity to.

No Project Affiliation Numeric

The specification of Project Affiliation is required, so if the activity is not affiliated with any project, then No Project affiliation must be checked. If No Project Affiliation is checked, project affiliations should not be selected from the pull-down menus.

Activity Duration Numeric

Required Field. Supply the estimated or actual number of hours (use whole numbers) dedicated to the activity, if such a measure is relevant (e.g., duration of a community training activity).

> **Note:** If a course is entered as an Activity Record, enter the number of hours for the semester. Do not multiply the duration by the number of students. The logic here is that the course itself is the activity that is being documented--no matter how many students attend, the course has one fixed length (i.e., number of hours).

The Not Applicable option might be used for activities such as information dissemination or research activities, the duration of which can be difficult to quantify, or for which a Center may not consider duration to be a relevant measure.

For **recurring Activities**, if you enter only one record, the Duration should reflect the total for all Activities. For instance, if there is a two hour TA meeting that takes place five times, it can be entered in NIRS only once (check the button that says it is a recurring activity), and the Duration will be 10, which is the total number of hours of TA provided.

Recurring Activity

Check this for on-going, activities (e.g., research, seminar series, course).

Activity Date

Date

Supply the date of the activity, using mm/dd/yyyy format. Data in this field may be used for conducting searches and running reports.

For on-going, rather than single-event activities (e.g., research, seminar series, course), you may simply enter the date the activity began.

---

projectID imported

Numeric

---

secondary ProjectID imported

Numeric

Added Date

Date

The database will automatically capture the date and time information was first inputted into a record. This information will not change. Instead, it will remain constant so that Centers will know when a record was first created.

To search by a specific date in the Added Date field, define one search field as greater than or equal to the date you want (i.e., for the date 08/28/2010, enter ">= 8/28/2010") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2010").

Added By

Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who created the record.

Updated Date

Date

NIRS automatically captures the date and time each time a record is updated. The most recent update date/time is displayed.

Search Tip: To search by a specific date in the "Updated Date" field, for example to search for the date 08/28/2010, define one search field as greater than or equal to the date you want (in this case ">= 8/28/2010") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2010").

Updated By

Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who last updated the record.

Activity ID

Numeric

Products Dataset lists selected products by their title, followed by a list of information dissemination activities that are linked to each product. The Activity ID is included after each information dissemination activity title listed in that products report, which may be helpful in distinguishing one activity record from one another when Centers assign the same title to individual information dissemination activities.

Products

Overview of the Products Dataset

The Products Dataset is intended to capture information on various materials produced and disseminated by network. NIRS allows Centers to manage information on the products they develop and/or disseminate. The products may be linked to specific activities and trainees.

Products may include:

- Academic Course Development
- Book Chapter
- Conference presentations and posters presented
- Distance learning modules
- Doctoral Dissertation or Master's Thesis
- Electronic Products
- Newsletters
- Pamphlets, Brochures, or Fact sheets
- Peer-reviewed publications in scholarly journals Published/In Press
- Peer-reviewed publications in scholarly journals submitted
- Press communications
- Reports and monographs
- Web-based products
- Other

Product records are intended to capture information such as title, author, date of publication, and the fiscal year in which it is being reported. The records also have fields for providing a brief description, indicating alternative formats, ordering, and cost information. The basic descriptive information provided when creating a new product record may be edited at any time. Starting FY 2011, Product forms have been customized based on product type, so the specific fields may differ between several product records.

The Products dataset links with the Activity dataset to capture product **dissemination** information. To capture dissemination information in NIRS, first a product record needs to be created, then an activity record can be created and the existing product record may be linked through the Information Dissemination core function option. After a product is linked to an Activity record, dissemination data entry fields will appear in the Product record. The dissemination number is capped at 2,000 for Posters/Presentations/Abstracts.

> **Note:** Dissemination data entry fields **do not display** in Product records that are not linked to an Activity record.

Once the Product and Activity records are linked, the dissemination data entry fields may be accessed for editing or updating through either the Product or Activity records.

For a discrete dissemination activity (i.e., reporting a time-specific event at which certain products are distributed), a Center might chose to create an Activity record, link all applicable products, and supply the total number of products disseminated all at one time.

For on-going dissemination activities (i.e., tracking periodic requests for a particular product in stock over an entire NIRS reporting period), a Center might chose to create an Activity record, link the Product record, and then edit the Product record with new dissemination information each time that product is distributed.

Products produced by trainees can be linked to their Trainee Year Records. This Feature was added in FY06.

Working in the Products Dataset

Adding, Listing, Viewing, Editing, Searching, Saving As, and Deleting Data in the Products Dataset

Creating Product Records

To create a new Product record, choose Add Product from the Products pull-down menu located on the top navigation bar. An Add button with the same functionality is located on the Welcome screen or on any of the Product Search, List/Edit, and View screens. Clicking on the Add button will open up a page with all Product types available; click on the Add button to the left of the Product type that you want to add. This will provide a blank product data entry form. Enter all of the data and click on the Save button.

Listing Records

The Product List/Edit screen displays each product record in the current fiscal year in alphabetical order by title. The list of products can be sorted by the date the records were added by clicking on Date Added, by the date the records were last edited by clicking on Edited, and in reverse alphabetical order by clicking on Title.

The List/Edit function displays only those product records for the current fiscal year. To display other Product Records in another year or multiple years, use the Search function.

To view all records for a certain product type, go to the main Products menu and select Add Product. The right-most column, Total Count, provides the total number of product records for each product type. The numbers are also links; click on the number for the desired category - this will display, in alphabetical order, all the product records for the respective product type.

Searching Records

The Product Search screen displays options by which the Activity dataset may be searched. The fiscal year pull down menu may be used to select records from a particular year, or all product records may be searched if All Years is selected from this menu.

Beginning in FY07, a multi year button can be used to identify multiple years to search. To select multiple years, click on the fiscal year in the pull down menu, then click the multi year button. Continue until all desired fiscal years are included. To remove a year from the criteria, simply click on the appropriate numerical text.

Saving Past Product Records into a New Fiscal Year (the Save As Function)

Many products are available for dissemination over multiple years, however NIRS requires a separate Product Record for each year. To create a new FY Product Record for a multiyear project, first find the product using the List/Edit or Search functions. Second, click on the View button to display the Product Record. Third, click on the Save As button in the upper right corner of the screen. A Product Record entry form, pre-filled with the product information, will be displayed. Modify this form as necessary for the current fiscal year and clickSave.

Changing the Product Type

In response to requests from the network, in FY 2013, a functionality has been added so that if a Product is accidentally added with the incorrect Product Type, then it is very easy to change the Type:

- Search for the respective Product
- Click on the View button to its left
- From the New Material Type drop-down menu, select the correct Type
- Click on Save As just beneath the drop-down menu
- The Product form opens up with the appropriate fields for the newly selected Product Type. All fields that applied to the initial Product Type as well are pre-filled with data previously entered. Complete all the required fields for the current Product Type and save the record.
- Search the original Product, with the incorrect Product Type, and delete it - this does not happen automatically.

Viewing Records

To view a Product Record, begin on the List/Edit screen. Click on the View button beside the intended record.

Editing Records

To edit a Product Record, begin on the List/Edit screen. Click on the Edit button beside the intended record. Once all changes have been made to the record, click Save.

Deleting Records

The Del button is used to delete records. Click on the Del button to delete a Product Record.

Program Type

Required Field. If the product involves more than one center funding, faculty, staff, or other resources, check all that apply.

Fiscal Year Numeric

Automatically Defined Field. The FY for all data is July 1 to June 30. The FY is automatically assigned when the Product Record is created. A product that is **published or disseminated** any time within a FY should be reported in that FY.

Note: Starting FY 2012, a new field has been created: Include(d) into DGIS/EHB export for... (select fiscal year from drop-down menu): select the fiscal year in which the product should be or was exported to the EHB; if the product was already exported to the EHB in the past, please select the appropriate fiscal year.

This field has been added to avoid exporting duplicate records to the EHB. If you are creating a Product record using the Save As function to bring a record from a previous year into the current fiscal year, and the respective product was already exported to the EHB in the past, please make sure to select the fiscal year when the product was exported, regardless of the current fiscal year.

Title Text/Numeric

Required field. Provide the formal title of the **product, article, or book chapter**. Up to 150 characters may be entered in the title field. Only one product can be reported per Product record.

Publication Name Text/Numeric

If appropriate, provide the name of the **journal, newsletter**, or **book** in which the item above was published.

Date of Publication Text/Numeric

For published products, supply the date of publication. For non- or self-published products (e.g, CD, handbook, monograph), supply the date of completion.

Use the mm/yyyy format; if the month of publication/completion is not known or applicable, supply the year in the yyyy format (e.g., 2010).

APA Citation — Text/Numeric

This field has a maximum of 500 characters that can be used to provide the citation for any products in the style of the American Psychological Association publication manual.

Book Author — Text/Numeric

Publisher — Text/Numeric

Supply the name of the publisher, if applicable. For non- or self-published products, supply the Center name or another appropriate entity's name. Up to 50 characters may be entered in the publisher field.

Starting FY2011, in response to a clarification on the detail necessary for Refereed Articles and Non-Refereed Publications for MCH reporting, users must supply as much relevant information as possible for Volume, Number, Supplement, or Pages for the product. Users must supply data in a least one of the four fields (volume, number, supplement, or pages) in order to save Refereed Articles and Non-Refereed Publications records. Also, Publisher Location (i.e, city or city, state) is now required for Book and Book Chapter product records.

Contact URL — Text/Numeric

Required field.

Please enter the url where the Product can be found or the email of the person who can be contacted to obtain copies.

Author(s) — Text/Numeric

Required field (starting FY 2011). Supply the name(s) of the author(s) of the product, separated by commas. Up to 150 characters may be entered in the author(s) field.

Author name(s) may be listed APA style (i.e., Smith, J.) or use the full first name (i.e., Smith, Johanna).

Include(d) into DGIS/EHB export for

Type of Material — Check All That Apply

Product Types	**Includes**	**Excludes**
Peer-reviewed publications in scholarly journals-Published/In Press (including peer-reviewed journal commentaries or supplements) Scholarly articles that have been published published in print or electronically in a scholarly journal that uses a professional reviewing strategy and external reviewers.	• Scholarly articles published in refereed journals	• Editorials, book reviews, and other non-scholarly articles published in refereed journals • Publications included in "Reports and monographs " or "Newsletters"

Peer-reviewed publications in scholarly journals-submitted Scholarly articles that have been submitted or accepted for print or electronic publication submitted or accepted for print or electronic publication in a scholarly journal that uses a professional reviewing strategy and external reviewers.	• Scholarly articles submitted or accepted for publication in refereed journals	• Editorials, book reviews, and other non-scholarly articles accepted for publication in refereed journals • Publications included in "Reports and monographs" • Publications included in "Newsletters"
Reports and monographs (including policy briefs and best practices reports) Materials prepared without a blind reviewing strategy for *print or electronic* publication that offers • (a) an account, description or explanation of a single thing or class of things; • (b) reference information on a particular topic; or • (c) basic, technical, analytical, investigative, or evaluative information.	• Monograph • Research, consultancy, or technical reports • Guides • Handbooks • Whitepapers • Commissioned evaluative or investigative reports • Policy briefs	• Grant or contract progress reports • Publications included in "Newsletters" • Publications included in "Public Awareness Materials" • Editorials, book reviews, and other non-scholarly articles accepted for publication in reports and monographs
Books Books that are • (a) written solely by the identified author(s), • (b) scholarly, • (c) bound, and • (d) offered for sale.	• Textbooks aimed at a university audience • Research monographs published by university departments or presses • Books published by privately-funded companies or university departments/ presses • Professional books	• Creative works such as novels • Commissioned evaluative or investigative reports • Research, consultancy, or technical reports • Textbooks that are aimed at secondary, primary or preschool students
Book Chapters Books chapters that are • (a) written solely by the identified author(s), • (b) scholarly, • (c) bound, and • (d) offered for sale.	• Textbooks aimed at a university audience • Research monographs published by university departments or presses • Books published by privately-funded companies or university departments/ presses • Professional books	• Creative works such as novels • Commissioned evaluative or investigative reports • Research, consultancy, or technical reports • Textbooks that are aimed at secondary, primary or preschool students
Electronic Products Materials initially prepared to present information of a discrete nature or represent a single event using electronic media.	• CD-ROMs • DVDs • Audiotapes • Videotapes	• Web pages • Courses developed • Alternate electronic format *versions* of a product • PowerPoint slides • Poster presentations • Radio/television interviews (see public

		awareness materials)
Web-based Products **Note:** Web pages are conceptualized as a *delivery mechanism* for products, rather than products themselves. *An entire website*, created specifically as deliverable, might be conceptualized as a product.	• Blogs • Podcasts • Web-based video clips • Wikis • RSS feeds • News aggregators • Social networking sites • Other (e.g.: Web Portals/Sites, Webinars/Teleconferences, Software (system or application), Databases, etc.)	• Distance learning modules • Alternate electronic format *versions* of a product • PowerPoint slides • Poster presentations • Radio/television interviews (see public awareness materials) •
Academic Courses Development Written educational programs intended for delivery in multiple segments and designed to drive instruction by identifying the • (a) skills and concepts to be taught, • (b) teaching strategies to be used, and • (c) evaluation methods to be used to measure student achievement.	• Curricula, courses, or training programs • Textbooks that are aimed at secondary, primary or preschool students	• Conference presentations • Inservices • Poster presentations • PowerPoint slides • Distance learning modules
Doctoral Dissertations and Master's Theses The required final paper prepared by a candidate for an academic institution's master or doctoral degree.	• Dissertations and theses accepted by relevant Committees	• Undergraduate or honors theses • Prospectuses, IRB approvals, or interim drafts of dissertations or theses
Conference presentations and posters presented Visual, textual, or oral materials presented at a conference that summarize a project, findings, policy, scientific or other article, or speech.	• Plenary, workshop, concurrent, or poster presentations at academic conferences • Peer-reviewed or juried abstracts published in relation to an academic conference	• Inservices • Roundtable discussions • Seminars, webinars, guest lectures • Descriptions of poster or other presentations printed in a conference agenda
Newsletters Materials prepared for *print or electronic* publications that are not refereed and are issued at either fixed intervals or on an occasional basis.	• Newsletters • Articles or editorials published in newspapers, newsletters, or magazines • Issue briefs	• Publications included in "Reports and monographs"
Pamphlets, Brochures or Fact sheets Brochures, pamphlets, or other awareness materials targeted to specific audiences, such as family	• Brochures • Pamphlets • Fact sheets • Tip sheets	• Publications included in "Newsletters" • Publications included in "Reports and monographs"

members, people with disabilities, etc.		
Press communications Information that are provided for newspapers, TV, and other media outlets in order to make people more aware about a subject.	• Radio/television interviews • Newspaper interviews • Public service announcements • Editorial articles • Other (e.g.: Press releases, etc.)	
Distance learning modules A module where students work on their own at home or at the office and communicate with faculty and other students via e-mail, electronic forums, videoconferencing, chat rooms, bulletin boards, instant messaging and other forms of computer-based communication.		
Other Any other product developed that does not fit in any of the above categories. Note: Per the current MCHB guidance (last page of the linked document), only up to 3 such Products may be entered during a fiscal year.		
The Products Dataset captures data on specific products produced at Centers. Development or editing efforts (e.g., editing of a journal, book, or book chapter; developing grant proposals, progress reports, or curricula; or creating web pages) are best captured in the Activity Dataset.		

Quantities Disseminated for Activity

Recording quantities disseminated is entirely optional. If you choose to collect this information, you can enter it in NIRS via the Product Dissemination tool. The tool is available in the Products drop-down menu: Products > Product Dissemination.

Use this tool to report your Center's dissemination efforts. For UCEDD Programs, this is for the output measure of "Number of products disseminated" that needs to be reported for the core function of Information Dissemination, as listed in the UCEDD Logic Model. This tool can be used to report dissemination of Products developed both in previous fiscal years and in the current fiscal year.

The summary table displayed on the Product Dissemination main page lists the following:

- **Number of Products created during previous and current years and disseminated during the current Fiscal Year**: this represents the number of individual Products disseminated during the current fiscal year, regardless of when they were developed. So this number includes both old (created during previous years) and new (created this year) Products.
- **Quantity of disseminated materials**: capturing this is entirely optional and not required for reporting. If you do choose to collect dissemination quantities, then you can enter them at the same time via the Product Dissemination Tool. The number listed is here is the total of all quantities

disseminated.

To review and/or update the Product Dissemination information, click on the **REVIEW | UPDATE** button. First, select the years that the Products disseminated were developed by checking the appropriate boxes. Then click on **Next**. For each of the years selected, all the Products developed in the respective years are listed. Select all the Products disseminated during the current fiscal year by checking the boxes to their left. Then click on **Next** again. The last step is entirely optional: if you collect dissemination quantities, then enter them. Otherwise, simply skip this step. When you are done, click **Save Data into Report and Close Window**. If at any time time you need to go back or simply cancel the data entry, click on **Previous** or **Close window without saving changes**, respectively. If any changes are made, they will be reflected in the summary table.

If you choose to collect dissemination quantities, below are helpful guidelines for a few Product types:

- For **Refereed journal articles, Non-refereed publications, Books, Book Chapters, and Periodicals**, use the publisher's circulation/distribution figures.
- For **Courses Developed and Electronic Products**: use actual dissemination numbers.
- For **Doctoral Dissertations and Master's Theses**: use actual dissemination numbers. Some universities submit dissertations and/or theses to off-site electronic databases (like ERIC). Because Centers will not be able to determine how many times those documents are downloaded from such databases, count the posting of these documents as one copy disseminated for each database they are posted to.
- **Posters/Presentations/Abstracts:** Visual, textual, or oral materials presented at a conference that summarize a project, findings, policy, scientific or other article, or speech. The upper limit for dissemination of this category has been capped at 2,000. Only those who attended the session, not the total registration of the conference, should be reported.
- For **Web Portals** (not individual web pages) captured within Electronic Publications, use the number of visits (not unique visitors) the portal received, as obtained through the portal's tracking software.

Target Audience

Select the appropriate target audience(s) for the product. Check all that apply. This field will be used to supply data to the FY06 MCH electronic handbook for LEND programs and will help us better serve the general public who search the public portions of NIRS for resources. The options are:

- Consumers/Families
- Professionals
- Policymakers
- Students

Brief Description

Supply a brief description or abstract of no more than 500 characters. Information provided in this field is critical to the search features of the AUCD web-portal, NIRS Search, and other linked search engines. Information provided in this field will help individuals with disabilities, their families, service providers, and others gain a basic understanding of the project. Also, staff from AUCD, ADD, and MCHB may glean information about projects from this field for the purposes of providing formal and informal reports to a wide array of constituents ranging from consumers and families to federal officials and congressional members and staff. Any special features of the product that are not captured in other fields may be provided here as well.

URLs can be provided with or without the http:// prefix; no special tagging or formatting is needed. Once the record is saved, the URL will display as a live, underlined link in view mode and in the public search of NIRS. Clicking on the link will open the document in a new window. **Users are cautioned to link documents only when they are sure that the link will remain valid for some time.**

> **Note**: NIRS does not have a spell/grammar-check function. Consider pasting descriptions in this field after spell checking in a word processing program.

Alternative Formats

Centers are assumed to supply products in alternate formats upon request. Check all that apply for the alternative format (s) in which a product was actually disseminated.

In some cases, the alternative format may also be a product type (e.g., an alternative format might be a disk and the product may be offered as a CD).

Alternative Formats:

- Captioned
- Braille
- Audio (cassette, audio file, etc.)
- Visual Format or Large Print
- Electronic (disc, CD, 508-compliant website)
- Language other than English

Ordering/Contact Information

Supply the cost per unit in the appropriate field if applicable. Commas may not be used (i.e., use $2000, not $2,000), but decimal points may be used (i.e., $23.99 rather than rounding off to 24).

This information appears in the public search function of NIRS. Use the pull down menu to select the contact person.

The ability to add ordering contacts or modify the contact information is currently restricted to users with an Admin access level. Manage the pull-down menu from Projects & Orders under the Admin tab on the top navigation bar.

> **Note**: The ordering contact for historical records may be changed through the Projects & Ordering function under the Admin tab on the top navigation bar.

Added Date	Date

The database will automatically capture the date and time information was first inputted into a record. This information will not change. Instead, it will remain constant so that Centers will know when a record was first created.

To search by a specific date in the Added Date field, define one search field as greater than or equal to the date you want (i.e., for the date 08/28/2012, enter ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012").

Added By	Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who created the record.

Updated Date	Date

NIRS automatically captures the date and time each time a record is updated. The most recent update date/time is displayed.

Search Tip: To search by a specific date in the Updated Date field, for example to search for the date 08/28/2012, define one search field as greater than or equal to the date you want (in this case ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012").

Updated By Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who last updated the record.

SubType: Other Text/Numeric

Frequency of Distribution Other Text/Numeric

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volume Text/Numeric

This field is required for one Product type: Peer-reviewed publications in scholarly journals published.

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number Text/Numeric

This field is required for one Product type: Peer-reviewed publications in scholarly journals published.

---

supplement Text/Numeric

This field is not required, and it is available for only one Product type: Peer-reviewed publications in scholarly journals published.

---

pages Text/Numeric

This field is required for one Product type: Peer-reviewed publications in scholarly journals published. Please enter the journal pages where the article can be found.

Projects

Overview of Projects Dataset

The Projects dataset is intended to capture general information each fiscal year on all the major initiatives of the Centers. Centers should record data on all projects, not just those primarily funded by ADD or MCH.

The Projects dataset is intended to record information on on-going major initiatives--which may span several years--that are likely to encompass multiple activities. In contrast, the Activities dataset is intended to record information on individual, time-limited events (often measurable in hours) with a more targeted purpose. NIRS is designed so that projects in the Projects dataset may be linked to a number of measurable activities.

Project-level reporting can further be distinguished from activity-level reporting in that project reporting focuses more on the project's purpose or infrastructure than the impact of their activities (e.g., number of students trained).

A common element to all projects that are reported in this dataset is that they are the entry point for funding and other resources. The types of information collected in the Projects dataset include:

- Who to contact

- Funding dates, types, sources, amounts
- Core functions
- Areas of emphasis
- Types of action
- Target audiences
- Unserved and underserved populations
- Collaboration with other agencies
- Consumer participation
- Geographic scope
- General description

Note: A project record should be created prior to creating any activity records that will be affiliated with it.

Working in the Projects Dataset

Adding, Listing, Viewing, Editing, Searching, and Deleting Data in the Projects Dataset

Creating Project Records

To create a new project record, choose Add Project from the Project pull-down menu located on the top navigation bar. An Add button with the same functionality is located on the Welcome screen or on any of the Project Search, List/Edit, and View screens. Clicking on the Add button will provide a blank project data entry form. Enter all applicable data and click on the Save button.

Listing Records

The Projects List/Edit screen displays each Project Record in the current fiscal year in alphabetical order by title. The list of projects can be sorted by the date the records were added by clicking on Date Added, by the date the records were last edited by clicking on Edited, and in reverse alphabetical order by clicking on Title.

The List function displays only those Project Records for the current fiscal year. To display Project records from a previous year or multiple years, use the Search function.

Note: In FY10 a Jump to alphabet character feature has been added to the header of the Project search queries (the returned character will be the first letter of the title).

Searching Records

The Project Search screen displays options for searching the Project dataset. The fiscal year pull down menu may be used to select records from a particular year, or all Project Records may be searched if All Years is selected from this menu.

Beginning in FY07, a multi year button can identify multiple years to search. To select multiple years, click on the fiscal year in the pull down menu, then click the multi year button. Continue until all desired fiscal years are included. To remove a year from the criteria, simply click on the appropriate numerical text.

Saving Past Project Records into a New Fiscal Year (the Save As Function)

Many projects span multiple years, however NIRS requires a separate Project Record for each year. To create a new fiscal year Project record for a multiyear project, first find the project using the List/Edit or Search functions. Second, click on the View button to display the Project Record. Third, click on the Save As button in the upper right corner of the screen. A Project record entry form, pre-filled with the project information, will be displayed. Modify as necessary for the current fiscal year and click Save.

Viewing Records

To view a Project Record, begin on the List/Edit screen. Click on the View button beside the intended record.

Editing Records

To edit a Project Record, begin on the List/Edit screen. Click on the Edit button beside the intended record. Once all changes have been made to the record, click Save.

Deleting Records

The Del button is used to delete records. Click on the Del button to delete a Project Record.

Project Description Required Field. Supply the description of the project.	Text/Numeric
contactID imported	Numeric
ca healthinsurance	Text/Numeric
ca childcare	Text/Numeric
ca head start	Text/Numeric
ca special education	Text/Numeric
ca general education	Text/Numeric
ca secondary education	Text/Numeric
ca voc	Text/Numeric
ca consumer advocacy	Text/Numeric
ca social	Text/Numeric
ca health public	Text/Numeric
ca housing provider	Text/Numeric
ca justice legal	Text/Numeric
ca faith	Text/Numeric
ca national association	Text/Numeric
ca otherhealthrelated	Text/Numeric

ca independent research Text/Numeric

Program Type

Required Field. Select all that apply. Identify the project as a LEND, UCEDD, SDHG, PPC, LEAH or DBP project by clicking the appropriate boxes.

If the project involves **more than one center** funding, faculty, staff, or other resources, check **all appropriate** boxes.

Fiscal Year Numeric

Automatically Defined Field. The FY for all data is July 1 to June 30. The current FY is automatically assigned when the Project record is created.

Multiyear Projects

Projects must have separate records for each FY in which they operate. For example, a project whose 18-month lifespan stretches between July 1, 2010 and December 30, 2012 should be reported in the FY 11, FY12 and FY13 datasets. See the section Current FY Funding Amount(s) & Source(s) below for information on apportioning project funding amounts across multiple reporting periods.

Project Title Text/Numeric

Required Field. Supply the title of the project. If the project does not have a title, a descriptive title may be developed for the purposes of data reporting or No Title may be checked. Up to 150 characters may be entered in the text box.

Project Abbrev Text/Numeric

Supply the abbreviation of the project's title, if applicable. If the project does not have an abbreviation for its title, this field may be left blank.

Project Code Text/Numeric

Required Field. Supply the Center-generated project code (if it has one) **OR** check No Project Code.

Funding Start Date

Supply the date that funds for the project were originally received, **even if that date falls outside of the current reporting period/fiscal year**. Supply the month, day, and year using mm/dd/yyyy format.

Funding End Date

Supply the date that funding for the project will terminate, **even if that date falls outside of the current reporting period/fiscal year**. Supply the month, day, and year using mm/dd/yyyy format.

Total Funding Numeric

Supply the **total amount of funding for the project over the entire course of the project's life**.

Omit dollar symbols and commas (i.e., use 2000, not 2,000). Omit decimal points and round off figures (i.e., use 24, not 23.99) as necessary.

> **Note**: If the project spans more than one FY (or reporting period), this figure is not likely to be equal to the figure supplied under the Current FY Funding Amount(s) & Source(s) fields below.

Funding Type

Supply the **funding type or mechanisms** (grant, contract, etc.) used to support the project. Check all that apply.

Grant, Contract, and Co-operative Agreements are more typically associated with project funding; however three other categories (University Support, Fees/ Per Capita Reimbursements, and In-Kind Contributions) are included as options because they may be mechanisms that supply matching funds for a project.

To track administrative/overhead funding, click on Other in the Funding Type field and specify this mechanism in the text box.

> **Note:** The funding **source** (federal agency, state agency, foundation, etc.) is captured under the Current FY Funding Amount(s) & Source(s)" fields below. Do not check Other and specify the funding source in the text box.

Current FY Funding Amount(s) & Source(s)

Supply information for the current fiscal year (July 1-June 30) only.

Omit dollar symbols and commas (i.e., use 2000, not 2,000). Omit decimal points and round off figures (i.e., use 24, not 23.99) as necessary.

The database has organized funding sources into four main categories: Federal, State, Local, and Other. Definitions for these categories are provided below. Clicking on any of the main categories will automatically pull up a menu of specific sub-categories. Supply information on categories of funding for the project.

> **Note: Indicate the funding source that directly provided funding to the project,** which might or might not be the original source of funding. For example, ADD provides funds to a DD Council, which in turn might give a grant to a Center. For NIRS purposes, the funding source would be the DD Council, not ADD, because the DD Council was the direct source of project funds.

Multiple sources of funding may be entered for each project. To begin, click on a main category (e.g., Federal) and enter the current FY dollar amount by the funding agency for each sub-category that applies. Once all of the figures in each of the applicable sub-categories have been entered under that main category, either click on Back to Main Form, to return to **Current FY Funding Amount(s) and Source(s)** to select another main category **OR** simply scroll up or down to the next main category of funding. To conclude this section and proceed with data entry for other fields in the project entry form, click on Back to Main Form or scroll up the page to reach the next field requiring data.

Funding Source Categories

Federal Funding Sources list major federal agencies. For those major federal agencies from which UCEDDs and LEND most often receive funding, a further breakdown of subordinate units is provided. For example, under Health and Human Services (HHS), additional subcategories include the Administration for Children and Families (ACF), Administration on Developmental Disabilities (ADD), Head Start, and Other ACF.

State Funding Sources list typical state-level functional units, such as Social Services, Education, and Health. State funding sources of particular relevance to UCEDDs and LENDs, such as DD Councils and Title V programs, are listed in this category as well.

Local Funding Sources list the following subcategories: Health, School District, Social Services, and Other.

Other Sources lists the following sub-categories: Foundation, Service Organization, Fee for Services, University, AUCD, and Other.

Apportioning Funds for Multiyear Projects

Centers may use their own judgment in determining how to apportion total project funding over multiple fiscal years or when the project funding period does not run from July 1 through June 30. For example, if a project is funded over three years with funding disbursed each year on October 1, Centers typically chose one of the following options:

1. The Center may elect to report the full funding amount in each of the July 1-June 30 reporting periods in which funding is disbursed on October 1, even if the funding actually spills over into additional fiscal years (or reporting periods).
2. The Center may elect to pro-rate the figures to reflect the actual funds captured in each of the July1-June 30 reporting periods.

Total Current FY Funding

The **Total Current FY Funding** amount is automatically calculated based on the amount(s) entered in the **Funding Sources** field(s). To change the figure listed in the **Total Current FY Funding** field, change the amount(s) listed in the **Funding Sources** field(s). Any changes made will cause an automatic recalculation of the amount in the **Total Current FY Funding** field.

FS CFDA Text/Numeric

The **CFDA #** field may be used to track federal funding information for each project. Only one CFDA field is provided per project As collaboration among Federal agencies in funding projects has increased, more than one federal funding source for an individual project has become more common; however there is typically is only one CFDA number for each funding initiative. In the rare case that a project has multiple Federal funding sources each with their own CFDA number, Centers may determine which number to use for their tracking purposes.

FS IES Numeric

Type of Activity

Required Field. Check all that apply for the project's Type of Activity categories (Advocacy, Capacity Building, and Systemic Change).

> **Note**: The **Project** dataset allows for the selection of **multiple** activity types because projects typically encompass multiple activities. In contrast, only **one** activity type may be selected for each activity in the **Activities** dataset.

Types of Activity:

- Advocacy: active support for a program, initiative, or change.
- Capacity Building: strengthening local, state, regional, and national communities.
- Systemic Change: modifying entire programs, policies, services, and/or funding streams.

Core Function

Required Field. Check all that apply for the project's Core Function options. Starting with the FY06 dataset NIRS reflects a new conceptualization of the core functions from the previous NIRS datasets.

Starting FY 2013, the Core Functions have been re-named and re-organized per the 2012 UCEDD Logic Model. Below are the current Core Functions and their definitions.

1. Interdisciplinary Preservice Preparation (Training Trainees)
2. Continuing Education/Community Training

3. Technical Assistance
4. Direct Clinical Services/Model Services
5. Other Direct/Model Services
6. Demonstration Services
7. Performing Research or Evaluation
8. Information Dissemination

1. **Interdisciplinary Pre-Service Preparation (Training Trainees)**

UCEDDs: Instructional program offered by the UCEDD that: (1) integrates knowledge and methods from two or more distinct disciplines; (2) integrates direct contributions to the field made by people with disabilities and family members; (3) examines and advances professional practice, scholarship and policy that impacts the lives of people with developmental and other disabilities and their families; (4) is designed to advance an individual's academic or professional credentials; and (5) takes place in an academic setting or program.

It may: (1) lead to the award of an initial academic degree, professional certificate, or advanced academic credential; and (2) contribute to a discipline-specific course of study offered by the UCEDD or by another academic department.

LENDs, LEAHs, PPCs, DBPs: You may use this to track training activities for long, medium or short-term trainees.

2. **Continuing Education/Community Training**

UCEDDs
:

- Continuing Education: Seminar(s) or courses of instruction offered by a UCEDD that: (1) serve to maintain professional credentials; (2) encourage professionals to expand their knowledge base and stay up-to-date on new developments; and (3) offer certificates of completion or CEUs (or their equivalents).
- Community Training: Training provided by UCEDD faculty/staff to enhance knowledge of a variety of community members (individuals with developmental and other disabilities, their families, professionals, paraprofessionals, policy-makers, students or others in the community).

Activities will be categorized as Continuing Education or Community Training based on the response to the question "Are continuing education credits offered? " , which already exists in NIRS:

- Yes = Continuing Education
- No = Community Training

LENDs, LEAHs, PPCs, DBPs: Use this for tracking CE activities needed to complete the Continuing Education Form and PM #59. Continuing Education is defined as continuing education programs or trainings that serve to enhance the knowledge and/or maintain the credentials and licensure of professional providers. Training may also serve to enhance the knowledge base of community outreach workers, families, and other members who directly serve the community.

- **Technical Assistance**

UCEDDs: Direct problem-solving services provided by UCEDD faculty/staff to assist individuals with developmental and other disabilities, families, programs, agencies, or other entities in improving their outcomes, services, management, and/or policies. Examples of improvements include, but are not limited to:

- Enhanced resources
- Enhanced services
- Strengthened networking of public and private entities across communities
- Increased awareness of evidence-based practices
- Enhanced capacity to assess current practices in relation to evidence-based approaches
- Identification of policy changes needed within the area of emphasis

LENDs, LEAHs, PPCs, DBPs: use this for tracking TA activities needed to complete the Technical Assistance/Collaboration Form and PM #59. Technical Assistance/Collaboration refers to mutual problem solving and collaboration on a range of issues, which may include program development, clinical services, collaboration, program evaluation, needs assessment, and policy & guidelines formulation. It may include administrative services, site visitation and review/advisory functions. Collaborative partners might include State or local health agencies, and education or social service agencies. Faculty may serve on advisory boards to develop &/or review policies at the local, State, regional, national or international levels. The technical assistance (TA) effort may be a one-time or on-going activity of brief or extended frequency.

- **Direct Clinical Services/Model Services** (formerly under Performing Direct and/or Demonstration Services, Model Services added)

UCEDDs: Specialized clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions.

LENDs, LEAHs, PPCs, DBPs: may be used for tracking Direct Health Care Services.

- **Other Direct Clinical Services/Model Services**(formerly under Performing Direct and/or Demonstration Services, Model Services added)

All Programs: Specialized non-clinical services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions.

- **Demonstration Services** (formerly under Performing Direct and/or Demonstration Services)

All Programs: Services that field test promising or exemplary practices and may be integrated with training, research, and/or dissemination functions.

- **Performing Research or Evaluation** (no changes)

All Programs: Implementation of basic and applied research, program evaluation, and analysis of public policy on issues impacting individuals with developmental disabilities. Research may entail functions such as proposal development, report writing, experimental/quasi-experimental design projects, interviews, focus groups, surveys, data entry, data analysis, and other types of functions. Research and evaluation functions may support measurement of progress, in areas such as consumer satisfaction, collaboration, and improvement.

• **Information Dissemination** (just a title change)

All Programs: Distribution of knowledge-based information through UCEDD developed products and activities.

Areas of Emphasis

Required Field. Check **all that apply** from the eight areas of emphasis in the DD Act as well as a general *Quality of Life* option and an *Other* option. Each area of emphasis is defined as follows

Areas of Emphasis listed in the DD Act

Quality assurance *activities:* The term quality assurance activities means advocacy, capacity building, and systemic change activities that result in improved consumer- and family-centered quality assurance and that result in systems of quality assurance and consumer protection that

- Include monitoring of services, supports, and assistance provided to an individual with developmental disabilities that ensures that the individual (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights; and (b) will not be subject to the inappropriate use of restraints or seclusion;
- Include training in leadership, self-advocacy, and self-determination for individuals with developmental disabilities, their families, and their guardians to ensure that those individuals (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights; and (b) will not be subject to the inappropriate use of restraints or seclusion; or
- Include activities related to interagency coordination and systems integration that result in improved and enhanced services, supports, and other assistance that contribute to and protect the self-determination, independence, productivity, and integration of individuals with developmental disabilities and their inclusion in all facets of community life.

Education and early intervention *activities:* The term *education activities* means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities being able to access appropriate supports and modifications when necessary, to maximize their educational potential, to benefit from lifelong educational activities, and to be integrated and included in all facets of student life. The term *early intervention activities* means advocacy, capacity building, and systemic change activities provided to individuals and their families to enhance (a) the development of the individuals to maximize their potential; and (b) the capacity of families to meet the special needs of individuals with developmental disabilities.

Child care-related *activities:* The term child care-related activities means advocacy, capacity building, and systemic change activities that result in families of children with developmental disabilities having access to and use of child care services, including before-school, after-school, and out-of-school services, in their communities.

Health-related *activities:* The term health-related activities means advocacy, capacity building, and systemic change activities that (a) enhance awareness, change behavior, or create environments that support good health practices and (b) result in individuals with developmental disabilities having access to and use of coordinated health, dental, mental health, and other human and social services, including prevention activities.

Employment-related *activities:* The term employment-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities acquiring, retaining, or advancing in paid employment, including supported employment or self-employment, in integrated settings in a community.

Housing-related *activities:* The term housing-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of housing and housing supports and services in their communities, including assistance related to renting, owning, or modifying an apartment or home.

Transportation-related *activities:* The term transportation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of transportation.

Recreation-related *activities:* The term recreation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of recreational, leisure, and social activities, in their communities.

Areas of Emphasis not listed in the DD Act

Quality of life activities: The term *quality of life* activities means activities that support individuals in their efforts to practice greater self-determination and consumer- and family-focused planning; exert greater choice and control in their lives; effect their full inclusion and participation in the community; and increase their general satisfaction with and access to services and supports.

Other: If *other* is selected as an area of emphasis, the following sub-options are available:

- **Other--Assistive Technology**. This option applies to any project that assists an individual with a disability and their family/caregivers in the selection, acquisition, or use of an assistive technology device.
- **Other--Cultural Diversity**. This option applies to any project that provides or focuses on the provision of services, supports, or other assistance that is conducted or provided in a manner that is responsive to the beliefs, interpersonal styles, attitudes, language, and behaviors of individuals who are receiving the services, supports, or other assistance, and in a manner that has the greatest likelihood of ensuring their maximum participation in the program involved.
- **Other--Leadership**. This option applies to any project that enhances the potential of health care, allied health or related personnel to improve the health, developmental or functional status of children and adults with disabilities and equips personnel with the knowledge and skills required to enhance the systems of care and support for people with disabilities and their families.
- **Other--please specify**. If this option is selected, provide explanatory text in the text box.

Target Audience

Required Field. **Check all audiences that apply**. This field applies to the entire life of the project, not just the current reporting period/fiscal year. If the project is something that does not have a target audience, the option of Not Applicable should be selected.

Note: The term Target Audience is used in the Project dataset. In contrast, the term Participants is used in the Activity dataset. Two different terms are used to capture two different data elements.

The Target Audience data, captured on the project level, is the *intended, or anticipated audience* of the project. Only descriptors of the Target Audience are required (students/trainees; professionals and paraprofessionals; family members, caregivers, persons with DD, or children with SHCN; not applicable; and other) in the Project dataset; target numbers for those audiences cannot be supplied.

Actual Participant data is captured on an activity level. In the Activity dataset, the actual numbers of participants are to be provided in the text boxes next to the descriptors.

The two types of data--target audience and actual participants--may or may not be the same. For example, a multi-year project may target different participants each year of the project. In that case, the project record would indicate multiple audiences (since it covers the entire project period), only one of which were actual participants in the project's activities during the current reporting period.

- Students/Trainees

- Community Trainees/Short Term trainees
- Professionals & Paraprofessionals
- Family members/Caregivers
- Adults with Disabilities
- Children/Adolescents with Disabilities/SHCN
- Legislators /Policy Makers
- General Public
- Not Applicable

Un/Underserved

Required Field. **Check all categories that apply**.

Unserved and underserved populations list options include:

- Racial or Ethnic Minorities
- Individuals from Disadvantaged Circumstances
- Individuals with Limited English Proficiency
- Individuals from Underserved Geographic Areas (empowerment zone, renewal community, reservation, rural/remote, urban, territory, other)
- Specific Groups of Individuals Within the Population of Individuals with Developmental Disabilities, including individuals who require assistive technology in order to participate in and contribute to community life. This category may include parents with disabilities.
- Other
- Project Does Not Serve an Unserved/Underserved Population

Collaborating

Required Field. **Check all categories that apply**. Text boxes are provided to specify the actual name of the agency(ies). The specification of agency name(s) is optional. In FY 2013, new options have been added to the list, to serve the reporting needs of all Programs that use NIRS.

Collaboration is conceptualized broadly to include any substantial interaction on an activity or project, even if a formal memorandum of agreement is not signed between organizations/agencies. Information on collaboration is collected in both the Project and Activity datasets. *Collaborating agencies **may or may not** be the same as funding sources.*

> **Note**: Of particular interest are collaborations with State Title V Agencies, MCHB-funded programs, Developmental Disabilities Councils, Protection & Advocacy Agencies, and UCEDDs.

CA Medicaid	Text/Numeric
CA State Health Dept.	Text/Numeric
CA State Adolescent Health	Text/Numeric
CA Clinical Programs/Hospitals	Text/Numeric

Consumer Participation Role

Required Field. Check all that apply.

Note: Supply information on the roles played by consumers in the **development, implementation, or evaluation** of the project, not in their roles (if any) as the audience of the project.

- Paid Staff
- Consultant
- Advisory Committee/Council
- Task Force
- Volunteer
- None

Primary Target Audience

Required Field. Check all that apply. A text box is provided to specify the location(s), however specifying agency location(s) is optional.

- Single County/Local
- Multi County
- State
- Multi-State/Regional
- Another State
- National
- International
- Not Applicable

Key Words Text/Numeric

Three to five words or phrases (up to 100 characters) may be entered in the Key Words field. Information provided in this field is critical to the search features of the NIRS Search and other linked search engines.

Project Desc

Supply an overall project description or abstract of approximately 500 words. Information provided in this field is critical to the search features of the AUCD web-portal, NIRS Search, and other linked search engines. Information provided in this field will help individuals with disabilities, their families, service providers, and others gain a basic understanding of the project. Also, staff from AUCD, ADD, and MCHB may glean information about projects from this field for the purposes of providing formal and informal reports to a wide array of constituents ranging from consumers and families to federal officials and congressional members and staff. The overall project description or abstract should address:

1. Need
2. Overall goals and objectives
3. Unusual features
4. Expected benefits.

Note: NIRS **does not** have a spell/grammar-check function. Consider pasting descriptions in this field after spell checking in a word processing program.

Added Date Date

The database will automatically capture the date and time information was first inputted into a record. This information will not change. Instead, it will remain constant so that Centers will know when a record was first created.

To search by a specific date in the Added Date field, define one search field as greater than or equal to the date you want (i.e., for the date 08/28/2012, enter ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012").

Added By Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who created the record.

Updated Date Date

NIRS automatically captures the date and time each time a record is updated. The most recent update date/time is displayed.

Search Tip: To search by a specific date in the Updated Date field, for example to search for the date 08/28/2012, define one search field as greater than or equal to the date you want (in this case ">= 8/28/2012") and then define a second search field as lesser than or equal to the subsequent date ("<= 8/29/2012").

Updated By Text/Numeric

NIRS automatically captures the identification code used to log on to the database by the individual who last updated the record.

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owner Text/Numeric

Contact ID Numeric

This information appears in the public search function of NIRS. Use the pull-down menu to select the contact person.

The ability to add ordering contacts or modify the contact information is currently restricted to users with an Admin access level. Manage the pull-down menu from Projects & Orders under the Admin tab on the top navigation bar.

> **Note**: The ordering contact for historical records records may be changed through the Projects & Orderin" function under the Admin tab on the top navigation bar.

Goals

Overview of the Goals Dataset

This dataset was added for the FY06 version of NIRS; it is only relevant to UCEDDs. MCHB Programs are not required to use this dataset.

The Goals Dataset is intended to capture information on UCEDD Core Funding Goals. This information is used to populate the ADD annual report template and will allow Centers to track their goals over time.

Working in the Goals Dataset

Adding, Listing, Editing, Searching, and Deleting Data in the Goals Dataset

Creating Goal Records

To create a new Goal record, choose Add Goal from the Goal pull-down menu located on the top navigation bar. An Add button with the same functionality is located on the Welcome screen or on any of the Goal Search, List/Edit, and View screens.

Listing Records

The Goal List/Edit screen displays each goal record in numerical order. To change the order of goals, simply change the goal number.

The List/Edit function displays only those goals for the current fiscal year. To display past FY Goal Records, use the Search function.

Searching Records

The Goal Search screen displays options by which the Goal dataset may be searched. The fiscal year pull down menu may be used to select records from a particular year, or all Goal Records may be displayed if All Years is selected from this menu.

The multi year button can be used to identify multiple years to search. To select multiple years, click on the fiscal year in the pull down menu, then click the multi year button. Continue until all desired fiscal years are included. To remove a year from the criteria, simply click on the appropriate numerical text.

Viewing Records

To view a Goal Record, begin on the List/Edit screen. Click on the View button beside the intended record.

Editing Records

To edit a Goal Record, go to the List/Edit screen. Click on the Edit icon beside the intended record. Once all changes have been made to the record, click Save.

Saving Past Goal Records into a New Fiscal Year (the Save As Function)

Many goals span multiple years, however NIRS requires a separate Goal Record for each year. To create a new fiscal year Project record for a multiyear project, first find the desired goal using the List/Edit or Search functions. Click on the Save As button to the left of the goal. A Goal record entry form, pre-filled with the goal information, will be displayed. Modify as necessary for the current fiscal year and click Save.

Deleting Records

The Del button is used to delete Goal Records. The Del button is available in the List/Edit and Search views.

Fiscal Year Text/Numeric

Automatically Defined Field. The FY for all data is July 1 to June 30. The FY is automatically assigned when the Goal Record is created.

Goal Number	Numeric

Supply a unique number for each goal (i.e., 1, 2, 3, etc.). Goal Records will be displayed in the dataset in numeric order. To change the order in which Goal Records are displayed, simply renumber them. This field can be left blank while goals are being renumbered.

Core Function

Check all that apply for the goal's Core Function options. The FY06 dataset reflects a new conceptualization of the core functions from the previous NIRS datasets.

Although NIRS displays *intuitive* core function labels on the data entry screens, the data entered in these fields will be displayed in standard reports that use the *actual* core function names.

The actual names of the 4 UCEDD core functions are:

1. Interdisciplinary Pre-Service Preparation and Continuing Education
2. Community Services (this has 2 sub-categories):
   Training and TA
   Direct Services & Demonstration Projects
3. Research
4. Information Dissemination

Intuitive labels:

Training Trainees (students engaged in your academic program)

This category is only for activities designed for trainees who are engaged in your academic program. Activities for individuals who participate in occasional training activities, but are not engaged in your academic program (including Short Term Trainees) should be captured under the Performing Technical Assistance and/or Training core function.

Check this option for your activities designed for your Interdisciplinary Preservice Preparation and Continuing Education trainees. Interdisciplinary preservice preparation and continuing education is conceptualized as training that serves to **expand an individual's professional or academic credentials.** Pre-service preparation and continuing education usually takes place in an academic setting or program that may (a) lead to the award of an initial academic degree or certificate; (b) include internship, practicum, fellowship, or residency activities; or (c) represent an advancement in academic credentials through a course of study.

Performing Technical Assistance and/or Training

Technical Assistance (TA) is defined as direct problem-solving services provided by faculty/staff to assist individuals, programs, and agencies in improving their services, management, policies, and/or outcomes. TA may be provided in person, by electronic media such as telephone, video, or e-mail, and by other means. The following are examples of technical assistance: needs assessment; program planning or development; curriculum or materials development; administrative or management consultation; legislative testimony; program evaluation and site reviews of external organizations; advisory group participation; policy development; coalition building; and consultation to service providers about clients.

Training: Community training is conceptualized as training that serves to benefit the community by **enhancing the knowledge of community members and/or maintaining the professional credentials** of those that directly serve the community. Community training is distinct from the ADD core function of Interdisciplinary Pre-Service Preparation and Continuing Education (Training Trainees) in that it encompasses any other types of training, including educational activities (a) offered for a variety of audiences; (b) offered for a specific audience; and/or (c) where professional certificates, certificates of completion, or CEUs (or their equivalents) are awarded.

Performing Direct and/or Demonstration Services

Direct Services may include direct activities related to quality assurance, education and early intervention, child care, health, employment, housing, transportation, recreation, or any other care, services or supports provided directly to individuals with developmental disabilities and/or their family members. Examples include:

- Training or educating individuals with developmental disabilities and their family members.
- Providing therapeutic child care, clinical services, or other direct services to individuals with a developmental disability and their family members.
- Providing technical assistance directly to individuals with developmental disabilities and their family
- Conducting research that includes a direct service component or intervention with individuals with developmental disabilities and their family members as subjects.
- Supervising professionals, paraprofessionals, or students who are providing direct services to individuals with developmental disabilities and their family members.

Demonstration Services may include a variety of services, supports, and assistance for individuals with disabilities or special health care needs, their families, professionals, paraprofessionals, policy-makers, students, and other members of the community. These services could be related to a wide array of areas, such as education, child care, health, employment, housing, transportation, recreation, and other areas.

Performing Research or Evaluation

Research may include basic or applied research, evaluation, and the analysis of public policy in areas that affect or could affect, either positively or negatively, individuals with developmental disabilities and their families. Research may entail functions such as proposal development, report writing, experimental/quasi-experimental design projects, interviews, focus groups, surveys, data entry, data analysis, and other types of functions. Research and evaluation functions may support measurement of progress, in areas such as consumer satisfaction, collaboration, and improvement.

Product Development & Information Dissemination

Information development and dissemination equip Centers to serve as a resource to various constituents on a local, regional, state, national, and international scope, through the provision of specific substantive areas of expertise that may be accessed and applied in diverse settings and circumstances. Information development and dissemination might include product dissemination, public awareness projects, and other types of initiatives.

Areas of Emphasis

Check **all that apply** from the eight areas of emphasis in the DD Act as well as a general *Quality of Life* option and an *Other* option. Each area of emphasis is defined as follows

Areas of Emphasis listed in the DD Act

***Quality assurance** activities:* The term quality assurance activities means advocacy, capacity building, and systemic change activities that result in improved consumer- and family-centered quality assurance and that result in systems of quality assurance and consumer protection that

- Include monitoring of services, supports, and assistance provided to an individual with developmental disabilities that ensures that the individual (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights; and (b) will not be subject to the inappropriate use of restraints or seclusion; or
- Include training in leadership, self-advocacy, and self-determination for individuals with developmental disabilities, their families, and their guardians to ensure that those individuals (a) will not experience abuse, neglect, sexual or financial exploitation, or violation of legal or human rights;

and (b) will not be subject to the inappropriate use of restraints or seclusion; or

- Include activities related to interagency coordination and systems integration that result in improved and enhanced services, supports, and other assistance that contribute to and protect the self-determination, independence, productivity, and integration of individuals with developmental disabilities and their inclusion in all facets of community life.

Education and early intervention *activities:* The term education activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities being able to access appropriate supports and modifications when necessary, to maximize their educational potential, to benefit from lifelong educational activities, and to be integrated and included in all facets of student life. The term early intervention activities means advocacy, capacity building, and systemic change activities provided to individuals and their families to enhance (a) the development of the individuals to maximize their potential; and (b) the capacity of families to meet the special needs of individuals with developmental disabilities.

Child care-related *activities:* The term child care-related activities means advocacy, capacity building, and systemic change activities that result in families of children with developmental disabilities having access to and use of child care services, including before-school, after-school, and out-of-school services, in their communities.

Health-related *activities:* The term health-related activities means advocacy, capacity building, and systemic change activities that (a) enhance awareness, change behavior, or create environments that support good health practices and (b) result in individuals with developmental disabilities having access to and use of coordinated health, dental, mental health, and other human and social services, including prevention activities.

Employment-related *activities:* The term employment-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities acquiring, retaining, or advancing in paid employment, including supported employment or self-employment, in integrated settings in a community.

Housing-related *activities:* The term housing-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of housing and housing supports and services in their communities, including assistance related to renting, owning, or modifying an apartment or home.

Transportation-related *activities:* The term transportation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of transportation.

Recreation-related *activities:* The term recreation-related activities means advocacy, capacity building, and systemic change activities that result in individuals with developmental disabilities having access to and use of recreational, leisure, and social activities, in their communities.

Areas of Emphasis not listed in the DD Act

Quality of life activities: The term *quality of life* activities means activities that support individuals in their efforts to practice greater self-determination and consumer- and family-focused planning; exert greater choice and control in their lives; effect their full inclusion and participation in the community; and increase their general satisfaction with and access to services and supports.

Other*:* If *other* is selected as an area of emphasis, the following sub-options are available:

- **Other--Assistive Technology**. This option applies to any project that assists an individual with a disability and their family/caregivers in the selection, acquisition, or use of an assistive technology device.
- **Other--Cultural Diversity**. This option applies to any project that provides or focuses on the

provision of services, supports, or other assistance that is conducted or provided in a manner that is responsive to the beliefs, interpersonal styles, attitudes, language, and behaviors of individuals who are receiving the services, supports, or other assistance, and in a manner that has the greatest likelihood of ensuring their maximum participation in the program involved.
- **Other--Leadership**. This option applies to any project that enhances the potential of health care, allied health or related personnel to improve the health, developmental or functional status of children and adults with disabilities and equips personnel with the knowledge and skills required to enhance the systems of care and support for people with disabilities and their families.
- **Other--please specify**. If this option is selected, provide explanatory text in the text box.

Type of Activity

Check all that apply for the goal: Advocacy, Capacity Building, and Systemic Change.

Activity Type Definitions:

- Advocacy: active support for a program, initiative, or change.
- Capacity Building: strengthening local, state, regional, and national communities.
- Systemic Change: modifying entire programs, policies, services, and/or funding streams.

Description

Provide a narrative of the goal. There are 65,535 characters available in this field.

Notes

This optional field is provided for notes, memo to self, etc. to be used at your discretion. 50 characters are available in this field.

Objectives

Objective Number Text/Numeric

Supply a unique identifier for each objective. Objectives will be displayed in the Goal Record in numeric order. To change the order in which objectives are displayed, simply renumber them. This field can be left blank while objectives are being renumbered.

For each objective, supply a number or letter that implies seriation. Use a consistent seriation strategy for each goal. For example, Centers might choose to number their objectives under Goal #1 as:

- 1.1, 1.2, 1.3, etc.
- 1-1, 1-2, 1-3, etc.
- 1a, 1b, 1c, etc.
- I, II, III, etc.

Note: If no numbers are entered, then the Objectives will not be listed in the UCEDD Annual Report to ADD.

Description

Supply a description of each objective. There are 65,535 characters available in each objective description textbox field. When finished with each objective, click on the Save & Add More button.

Directory

Overview of the Directory Dataset

The Directory is designed to assist the network, federal/state agencies, and the general public to quickly locate people by their interests and expertise. The Directory is password protected: individual users may edit/update their profiles and Center NIRS administrators have the responsibility for accepting and otherwise managing those profiles.

AUCD maintains this dataset for all Programs (UCEDDs, LENDs, LEAHs, PPCs, DBPs, and CDC State Disability and Health Grantees (SDHG)). Some of the fields described below do not display for all users.

Section I-Basic Contact Information (all fields in this section are required)

All fields except user name and password will display in the online directory if the profile is both approved and identified to display by the administrator.

First Name - required field
Last Name - required field
Degree
Phone - required field
Email - required field

User Name (6+ characters, symbols and numbers may be used, not case sensitive) - required field
Password (6+ characters, symbols and numbers may be used, not case sensitive) - required field

Additional Contact Information (for SDHG only): name of employer if affiliated with another location

Section II-Additional Information

This information will be searchable in the public view of directory if the profile is both approved and identified to display by the administrator.

Position

Required field. One position is required, however multiple positions may be identified. The positions are organized under the following categories and display in the same order online:

- Leadership (check all that apply from list of options)
- Lead Administrative Staff (type in title)
- Primary Activity Coordinators (check all that apply from list of options)
- Discipline Coordinators (check all that apply from list of options)
- Specialty Resource Contacts (type in title)
- Project/Program/Clinic Contacts (type in title)

Primary Discipline

This field is required. For MCHB Training Programs, this field will be included in the data export from NIRS to the DGIS/EHB.

Discipline(s)

This field is not required. Users may select all that apply from a list of options; for the purpose of a complete online profile, please make sure to select all the disciplines that apply.

Council Membership

Required field. One selection is required, however multiple councils may be selected. One selection option is No Council Membership (None), which is selected by default, and you will need to uncheck if you check any of the Councils. Beginning October 1, 2009, AUCD started to dynamically populate the

Council membership lists on the AUCD website from the Directory profiles.

Professional Areas of Interest and Expertise

Provide a list of key words, separated by commas, rather than complete sentences. A limit of 200 words is suggested for each of the 3 categories:

- Research
- Education
- Service

Vita/Bio

Cut and paste in plain text a brief (roughly 2 pages or less) vita or bio.

Photo

Upload a photo that is a good likeness of individual in the profile. The photo should be at most 250 (width) by 300 (height) pixels. The photo should NOT be of anything other than the person in the profile (i.e., not a pet, building, abstract image, etc.) presented in a professional manner.

Section III-Demographics

This information is collected to respond to MCHB reporting requirements, AUCD requests for information, and other university-based reporting.

Former Trainee Status

Required field. Identify if the individual is a former MCHB-program trainee and/or UCEDD Trainee or neither.

Gender (M/F)

Year of Birth (YYYY)

Year Hired in MCH Leadership Training Program/Year Hired at Center (YYYY) - required field

Race (choose one from list of options) - required field

Ethnicity (choose one from list of options) - required field

Primary Employment Role at UCEDD/LEND (pick one)

- Program Director or Associate Director
- Senior Faculty: Faculty at the rank of Associate Professor or Professor.
- Junior Faculty: Faculty at the rank of Assistant Professor, Lecturer, Adjunct, etc.
- Clinical Staff: Individuals with a high degree of expertise and training who specialize in providing clinical services.
- Professional Staff: Individuals with a high degree of expertise and training who specialize in performing professional, scientific, or technical activities.
- Support Staff: Non-contract employees that include assistants, clerks, coordinators, etc.

Personal Relationship with Disabilities (check all that apply)

- Person with a disability
- Person with a special health care need
- Parent of a person with a disability
- Parent of a person with a special health care need

- Family member of a person with a disability
- Family member of a person with a special health care need
- None

Subscription to AUCD Listserves

Check / Uncheck all that from list of options to manage member subscriptions to the AUCD listservs. A page on the AUCD website provides a listing of all "subscribe-able" AUCD listserves (http://www.aucd.org/template/listserv.cfm). A new feature has been added to allow users to quickly determine what lists they are subscribed to by entering in their email address.

Section IV- Administrative Fields (available only to users with Admin access level, who have access to the Directory dataset, and are Directory Managers)

Member Affiliation(s)

Required field. For UCEDDs and/or LENDs, check all that apply. For LEAHs, DBPs and PPCs, your Program Type is pre-selected.

Member status in online Directory - for UCEDDs and or LENDs only

Required field. The online Directory is the AUCD Directory of network members listed on the AUCD website. Select one option:

- Display
- Do not display
- Inactive
- Pending Submission
- Waiting for Approval
- Rejected

CARES

Overview of CARES

A CARES Module is provided for LENDs and DBPs to provide quantitative data on their programs to assist MCHB in evaluating the impact of CARES funding. The same questions are asked of the LENDs and DBPs in the module.

Questions about the evaluation itself and the module's data elements should be directed to Insight Policy Research:

For LEND questions, please contact:
Betsy Thorn at (703) 504-9488 or bthorn@insightpolicyresearch.com or
Carla Bozzolo at (571) 758-5036 or cbozzolo@insightpolicyresearch.com

For DBP questions, please contact:
Brittany McGill at (703) 504-9485 or bmcgill@insightpolicyresearch.com or
Rachel Holzwart at (571) 758-5004 or rholzwart@insightpolicyresearch.com

2016-2017 LEND AND DBP DATA DICTIONARY FOR NIRS MODULE

All questions ask you to report for the grant year ending in 2017 (July 1, 2016-June 30, 2017). Some questions ask you to report on long, medium and short term trainees.

All results will be aggregated across grant programs and no comparisons across programs will be made.

Question	Definition
1. Total number of trainees: Short term: Medium term: Long term:	*Long Term Trainees* are those with 300 or more contact hours with the training program, benefiting from the training grant (both supported and non-supported trainees). *Medium Term Trainees* are trainees with 40-299 contact hours in the current reporting year. *Short-term Trainees* are trainees with less than 40 contact hours in the current reporting year. Continuing education participants are not counted in this category.
2. Number of trainees who completed coursework covering one of more of the following topics: early signs of ASD/DD; screening, diagnosis, and/or evidence-based interventions for ASD/DD: Medium term: Long term:	Coursework refers to LEND/DBP-program specific lecture series, seminars, or multiple classes. It does not include attendance at 1 lecture or seminar.
3. Number of trainees who participated in clinical activities or field work that included one or more of the following topics: early signs of ASD/DD; screening; diagnosis; and/or evidence-based interventions for ASD/DD: Medium term: Long term:	"Clinical activities or field work" refers to experiential training that includes both observation and direct provision of services to children and families in clinical and community-based settings such as schools.
4. Total number of CE events that addressed one or more the following topics: valid, reliable screening tools; valid diagnostic tools, and/or evidence-based interventions for ASD/DD:	Continuing Education refers to programs or trainings for which CEUs may be earned and that serve to enhance the knowledge and/or maintain the credentials and licensure of professional providers (for example, clinicians, early intervention specialists, and educators). Report CE events offered by or in association with your LEND/DBP program that addressed screening tools (e.g., M-CHAT), diagnostic tools (e.g., ADOS) and/or evidence based interventions for ASD and other developmental disabilities.
5. Total number of participants that attended CE events reported in 4:	Provide a sum total of participants who attended the CE events reported in 4. Although CE events may primarily target practicing professionals, participating trainees should also be included in the sum total.
6. Number of training events (excluding CE) offered through your LEND/DBP program relating to one or more the following topics: valid, reliable screening tools; valid diagnostic tools, and/or evidence-based interventions for ASD/DD:	Examples might include community trainings and other presentations or programs for non-professionals such as child care providers or family members and individuals with disabilities. Do not include CE events reported in 4. Report the total number of training events offered by or in association with your LEND/DBP program

	between July 1, 2015 and June 30th, 2016.
7. Total number of participants that attended events reported in 6:	Provide a sum total of participants who attended the training events reported in 6.
8. Number of infants/children who received interdisciplinary diagnostic services to confirm or rule out ASD/DD:	Report the total number of infants and children who have been evaluated for ASD or another developmental disability through a clinic or by a faculty member/fellow or trainee affiliated with your LEND/DBP program between July 1, 2015 and June 30th, 2016. Grantees may refer to billing data to capture the total.
9. Number of LEND/DBP faculty and/or trainees who worked in clinical settings located in an underserved area or who are working with underserved populations:	Faculty include adjunct and other faculty members that work, in some capacity, with the LEND/DBP program at your institution. The term "underserved" refers to Medically Underserved Areas and Medically Underserved Populations with shortages of primary medical care, dental or mental health providers. Populations may be defined by geographic (a county or service area) or demographic (low income, Medicaid-eligible populations, cultural and/or linguistic access barriers to primary medical care services) factors. See http://bhpr.hrsa.gov/shortage/muaps/ for HRSA's definition of MUA/Ps.
10. Number of LEND/DBP faculty and trainees who participated in the conduct of ASD/DD related research (for example, research on valid and reliable screening or diagnostic tools, evidence-based interventions and supports, service delivery models, or other related topics).	Faculty includes adjunct and other faculty members that work, in some capacity, with the LEND or DBP program at your institution.

Association of University Centers on Disabilities (AUCD)
National Information and Reporting System (NIRS)
USER'S GUIDE
Fiscal Year 2019
(7/1/2018 - 6/30/2019)

Purpose of this Guide

The User's Guide provides basic technical assistance to users of the NIRS system. NIRS was designed to support University Centers for Excellence in Developmental Disabilities Education, Research, and Service (UCEDDs) and Leadership Education in Neurodevelopmental and Related Disabilities (LEND) Programs in complying with Federal reporting requirements, as well as to facilitate the documentation, analysis, and reporting of UCEDD and LEND accomplishments. Beginning in FY06, NIRS welcomed two MCHB programs: the Pediatric Pulmonary Centers (PPCs) and Leadership Education in Adolescent Health (LEAH) Programs. Then, in FY2009, Developmental Behavioral Pediatrics Centers (DBPs) and State and Disability Health Grantees (SDHGs) started to use NIRS.

NIRS allows direct data submission by many program staff. Thus, the intended users of this Guide extend beyond data coordinators and other data-specific personnel to include all staff who enter data.

This Guide provides information on NIRS' functions, such as logging in and entering data. It also provides limited information on some of the more technical functions of NIRS, such as creating user IDs and user-defined fields.

Because this Guide covers only the mechanical aspects of NIRS, it is most effective when used in tandem with the on-line NIRS data dictionary, which provides an explanation of each of the datasets and their fields. While this Guide instructs users on how to access a data entry form, the data dictionary will help users determine which data entry form to access for the particular information they wish to record. Collectively, the User's Guide and data dictionary support consistency in how NIRS is used across the AUCD network, thereby supporting the collection of national data that are credible and accurately represent the work of network programs.

The basic operation of each of the datasets is similar. Therefore, this Guide is organized according to common user functions, instead of by dataset. Within some of the sections on common user functions, there are sub-sections on any aspects of common functions that are unique to individual datasets.

Overview of NIRS

Originally mandated in the 1987 amendments and again in the reauthorization of the Developmental Disabilities Assistance and Bill of Rights Act (DD Act) in 2000, UCEDDs must submit impact data to the Administration on Intellectual and Developmental Disabilities (IADD). Similarly, LEND, LEAH, PPC and DBP Programs are required to submit impact data to the Health Resources and Services Administration (HRSA)'s Maternal Child Health Bureau (MCHB). NIRS was designed to maximize opportunities to integrate ADD and MCHB data reporting requirements, thereby minimizing Program's data submission burden.

Not only does the NIRS national data reporting process help ensure compliance with Federal data reporting requirements, it helps tell the important story of AUCD Network Programs to a wide array of constituents, including individuals with disabilities/SHCN and their families, local communities, states, service providers, funding agencies, policy-makers, and other partners. For instance, data can support efforts to fund AUCD network programs by informing the Congressional appropriations process and providing critical documentation in competitive grant applications. National data reporting can also support the data management, program evaluation, long-range planning, and information sharing efforts of individual programs at a State and local level.

Before the current NIRS database was instituted, NIRS collected national data through 10 Datasets, with programs using different formats to submit their data. The wide variety of platforms and software packages used limited data aggregation, and, in the summer of 2000, an initiative was launched to revise national data reporting. That initiative culminated in the August 2002 launching of the new NIRS, which utilizes one Web-based system for collecting, managing, and reporting data throughout the network. It consists of the following datasets:

1. Trainees
2. Projects
3. Activities
4. Products
5. Goals
6. Directory

Logging On

Each Center authorizes its own users; however, upon request, AUCD will assist Centers in establishing logins and passwords.

Note: NIRS has been optimized for Internet Explorer (7.0 and above for PC's), Firefox (2.0 or above), and Firefox or Safari for Macs. Using older versions of these browsers or different browsers may cause technical difficulties. You can download the latest versions using the links provided on the NIRS login screen.

The **User's Guide**, **Data Dictionary**, **FAQ** and other **useful materials** can be accessed on the NIRS Resource Page.

To log on to NIRS:

- **UCEDD and LEND Programs**:

1. Go to www.aucd.org/nirs/db/index.cfm.
2. At the first field (Center Name), select your program's name from the drop-down menu.
3. At the second field (Login), enter your login ID.
4. At the third field (Password), enter your password.
5. Hit the Submit button, which will take you to the NIRS Dashboard where all of the NIRS options can be accessed.

- **LEAH, PPC and DBP Programs**:

1. Go to www.aucd.org/nirs/db/index2.cfm.
2. At the first field (Center Name), select your program's name from the drop-down menu.
3. At the second field (Login), enter your login ID.
4. At the third field (Password), enter your password.
5. Hit the Submit button, which will take you to the NIRS Dashboard where all of the NIRS options can be accessed.

Note: Beginning in FY07, the login system default setting uses a "cookie" that reconnects users who would otherwise "time out" after 1 hour of inactivity. Users may decline the cookie upon logging in.

Navigating the Site

Once logged on to NIRS, functions are available to users according to their level of access (see the section User Access below for additional information on access levels). The following information will help you navigate the NIRS system:

1. The first page after logging in--the Dashboard--should have your program's name across the top and the NIRS Database logo across the top of the upper lefthand of the page.
2. At the top of the Dashboard page, you will see the dataset names. In the upper half of the Welcome page, you will see the navigation bar, with pull-down menus for each of the datasets in NIRS:
   - Trainees
   - Projects
   - Activities
   - Products
   - Goals
   - Directory
3. The dataset pull-down menu is divided into two subnavigations: Manage Dataset and View Data
   - Add--entering data into a new record
   - Manage--pulling up past or current records according to defined criteria
   - Standard Reports--compiling information by specific fields and criteria
   - Custom Reports-- compiling information by specific fields and criteria
   - Data Dictionary--accessing general information on the dataset and specific information on each field in the dataset.

You can go back and forth between NIRS pages freely, except when you are entering data (see the information below under the section, Entering Data, for caveats on leaving the data entry mode).

Reviewing the Data Dictionary

The Data Dictionary can be accessed in its entirety online on the NIRS Resource Page or after logging on to NIRS. After logging on to NIRS, there are two ways to review the data dictionary:

1. On the top navigation bar, click on the chosen dataset. In the upper righthand corner click on the Dictionary link highlighted in blue. Scroll to the information you need; or
2. From the Dashboard page, click on Data Dictionary under each dataset, which will take you only to the section of the Data Dictionary for that particular dataset.

To ensure that you are working from the most up-to-date version of the data dictionary, refer to the 'Last Updated' field at the top of the document.

Searching the Data Dictionary

The data dictionary can be searched by individual words and exact phrases. To search by one or more individual words, enter the word(s) in the Search field and click the green Search button. To search by an exact phrase, enter the phrase in quotes in the Search field and click the green Search button. The two methods differ as follows: searching for the phrase "long-term trainees" will find instances where this entire phrase is found, whereas searching for the term "long-term trainees" without quotation marks will find places where the word "long-term" and the word "trainees" are found, but not necessarily as a unit. These two approaches (phrases in quotation marks and individual words) also can be used at the same time. For example, searching for "LEND long-term trainees" will find records that contain both the word "LEND" and the phrase "long-term trainees," but not necessarily the phrase "LEND long-term trainees."

Reviewing the On-line User's Guide

While the Data Dictionary explains the purpose and appropriate usage of each dataset and their fields (i.e., when to use a dataset), the User's Guide explains the mechanical steps of using the database (i.e., how to use a dataset). The User's Guide (Guide) can be accessed prior to or after logging on to the system.

Reviewing the User's Guide

To review the Guide:

1. On the top navigation bar, under the person icon, click on User's Guide.
2. To view the Guide in its entirety, click on the green Full User's Guide button on the left of the top of the screen.
3. To view specific sections of the Guide, double click on the section title in the menu on the left side of the screen.

To ensure that you are working from the most up-to-date version of the User's Guide, refer to the 'Last Updated' field at the top of the document.

Searching the User's Guide

The User's Guide can be searched by individual words and exact phrases. To search by one or more individual words, enter the word(s) in the Search field and click the green Search button. To search by an exact phrase, enter the phrase in quotes in the Search field and click the green Search button. The two methods differ as follows: searching for the phrase "activity records" will find instances where this entire phrase is found, whereas searching for the term "activity records" without quotation marks will find places where the word "activity" and the word "records" are found, but not necessarily together as a unit. These two approaches (phrases in quotation marks and individual words) also can be used at the same time. For example, searching for "entering activity records" will find records that contain both the word "entering" and the phrase "activity records," but not necessarily the phrase "entering activity records."

Accessing On-line Resources/TA

Helpful resources and paper form materials are available on-line. Once logged on to NIRS, the Resource page can also be accessed from the NIRS pull-down menu by clicking on Resources/TA.

The resource page has links to:

- Archived Training Materials
- Paper Forms
- Introduction to Custom Reports
- Data Dictionary
- User's Guide
- CAAI Module Training Materials

Entering Data

One of the most basic uses of NIRS is to create new data records in each dataset. The following steps outline how to enter data in new records:

From the Welcome page:

1. Locate the dataset you want on the screen.
2. Underneath the dataset header, go to the subnavigation Manage Datatset, click on the Add button to go to the data entry forms.
3. Enter data into each field.
4. Hit Save once all data are entered.

From the top navigation bar:

1. Click on the name of the dataset you want.

2. From the subnavigation choose Manage Dataset then click on Add... to go to the data entry form. An Add button with the same functionality can be found on the Manage Dataset page and View pages.
3. Enter data into each field.
4. Hit Save once all data are entered.

Data field instructions:

1. On the data entry forms, individual data fields that are not self-explanatory have instructions listed in red.
2. For more detailed field instructions on each dataset, see the Data Dictionary.

Note: Please remember to click Save before leaving the data entry forms or data entered will be lost.

General Guidelines on Completing Entry Screens:

- Radio dial buttons allow only one choice per field

 = a blank radio dial button

 = a completed radio dial button.

- Check boxes allow multiple choices per field:

 = a blank check box

 = a completed check box.

- Dropdown lists allow only one choice from the menu:

 = a blank drop-down menu

= a completed drop-down menu.

- The presence of an asterisk in front of a field indicates that a response is required in order to complete the data entry process and save the record:

***Title of Project** = a required field

Project Abbreviation = an optional field.

Notes on Entering New Trainee Records: The steps for creating a new Trainee Record are similar to the steps for entering data in other types of records. The one difference is that one complete Trainee Record consists of two separate forms, a Trainee Main Record and a Trainee Year Record. To enter trainee data in a new record, follow these steps:

To create a new trainee record:

1. Choose Add Trainee from the Trainee subnavigation, Manage Dataset, located on the top navigation bar.
2. Clicking on the Add button will provide a blank trainee main record entry form.
3. Enter all of the trainee's data and click on the Save button.
4. After clicking Save, a blank **trainee year** entry form will be displayed, defaulted to the current fiscal year. If necessary, a different fiscal year may be selected from the drop-down list at the top of the page. Once all data are entered, click Save, at which point the trainee record creation process will be completed.

Notes on Adding Trainee Year Records: To create Year Records for existing trainees follow these steps:

1. Go to the Manage Long/Med Term Trainee screen under the Trainees Dataset.
2. Click on the Add button under the Manage Annual Rec.
3. The new year form will be pre-filled with the most recent year's information, which should be modified as necessary for the year being reported.
4. Once all data are entered, click Save.

OR

1. Go to the Manage Long/Med Trainee screen under the Trainees Dataset then Click on Manage Main Rec.
2. Click on the View button beside the Trainee Year record that you want to copy and edit.
3. Once you are in the View mode, you will see the Add Trainee Year Record button in the top right corner of the View screen.
4. Hitting the Add Trainee Year Record button will pull the Trainee Year record up in edit mode, and the FY field will display the current FY in the drop-down list, but the FY can be changed manually.
5. The new year form will be pre-filled with the most recent year's information, which should be modified as necessary for the year being reported.
6. Once all data are entered, click Save.

Notes on Linking Product Records to Trainee Year Records: When reporting on a product produced by a trainee, follow the steps below. Please note that the Product record must have been created prior to linking it to a trainee year record. There used to be the possibility to create a new Product record from the Trainee Year record, but that is no longer an option.

1. Go to the List/Edit screen under the Trainees dataset.
2. Click on the Edit button for the appropriate Trainee Year Record.
3. Scroll down to the Product(s) Produced by the Student this year field.
4. Link an existing product record:
   a. Click on the radio dial button beside Link an Existing Product.
   b. Select a product from the drop-down list by clicking the arrow to the right and highlighting the product.
   c. Click Go!
   d. The product record will pop up with all of the fields filled in as they were previously entered. Enter any applicable changes, such as adding the trainee's name to the Author(s) field if not already listed, and click Save.
   e. After clicking Save, you will be taken back to the Trainee Year Record entry form, where you should continue entering trainee data.

Canceling Data Entry

The Cancel feature functions as follows:

Trainees: When adding a new trainee, if you open a new trainee main record, add data, and then click Cancel, the trainee is deleted. If you save the new trainee main record form instead of canceling it, proceed to the trainee year record form, partially enter trainee year data, and then click Cancel, the trainee year record is canceled and the saved trainee main record is deleted.

Projects: If you open a new project record form, add or edit a project contact, and then click Cancel, the project is deleted. The added or edited project contact information is not deleted. If you want to delete a project record that is linked to an activity record, you must first unlink any affiliated activities before going to the Project Dataset and deleting the project record from there.

Activities: If you open a new activity record form, begin entering data, and then cancel the activity, the activity is deleted.

Products: If you open up a new product record form, add or edit a product ordering contact, and cancel the product, the product is deleted, but the added or edited contact is not deleted. If you want to delete a product that was created and later linked to an activity record, you can go to the Product dataset and delete the record directly from there. The activity record will not be deleted, but it will no longer show the deleted product as linked.

Goals: If you open a new goal record form, begin entering data, and then cancel the activity, the activity is deleted

Directory: If you open a new directory record, begin entering data, and then cancel the entry, the new record is deleted.

Editing Records

Only records in the **current** fiscal year's Activities, Products, Projects, and Goals datasets can be edited; however, **all** Directory and Trainee records, regardless of fiscal year, can be edited.

To add to or update an existing record:

1. Choose Manage from the appropriate dataset.
2. Click on the Edit button (with the pencil figure) beside the intended record.
3. Once all changes have been made to the record, click Save.

Notes on Changing Number of Products Disseminated: The number of products disseminated can be edited in the following way:

1. Go directly into the product record through the Products dataset:
   a. Use the Manage Products or Search function to find the desired product record.
   b. Beside that record, click Edit.
   c. Change the amount(s) under the Quantities Disseminated field and click Save.

Notes for Unlinking Product Records that are Linked to Activity Records: There are two ways to unlink products from activities. Neither method will delete the main linked product or activity; they will simply remove the link between the two records, along with quantities disseminated information.

Unlinking a Product through the Product Record:

1. Using the Manage or Search function, go to the product record from which you want to unlink a product record.
2. Click on Edit beside the activity title from which you want to unlink the product.
3. Where the Quantities Disseminated boxes are shown, click on the green Delete Link button. The system will automatically remove the linked product and take you to your list of product records. The main product record will still be listed.

Notes on Linking Product Records to Trainee Records: Products authored by trainees may be linked to their trainee year record. This linking function supports LEND Programs in their reporting to MCHB. Once linked, the only way to unlink the product record from the trainee year record is to DELETE the product record. Therefore, we recommend that you do not link any products to trainee year records unless the trainee actually authored the product.

Listing Records

There are two ways to list the current reporting period records in any dataset:

1. From the Dashboard, click on box with the appropriate dataset listed.
2. Using the navigation bar, click on the desired dataset, and then click on Manage.

Note on Order of Lists: The Manage screen displays each record in order, as follows:

- For Activities and Projects, the records are listed in alphabetical order by title.
- For Products, all affiliated activities are listed in alphabetical order under product titles, which are also listed alphabetically.
- For Trainee Main Records, the alphabetical order is according to last name. Each Trainee Year Record is listed in chronological order underneath the Trainee Main Record.
- For Goals, the records are listed by number in ascending order.

Note on Changing the Order and Options for Lists: Record lists may be customized to appear in orders other than those listed above. To customize lists, go to the Search function and define one or more of the four Other Search fields as not blank. For example, select Date of Activity as not blank for activity records. Click the Submit button. The records will appear initially in the standard manner described above (e.g., in alphabetical order by activity title); but, by clicking the additional List header defined in the Search function (e.g., Date of Activity), Records are re-ordered according to the field you clicked on (e.g., by date instead of by title).

Note on Scrolling through Large Record Lists: When the total number of records in a dataset exceeds 50, the system will automatically break the List of records into subsets of 50 per List page, which you can scroll through using the First, Back, Next, and Last buttons. If this still yields an unwieldy amount of records in the List page, a Search can be conducted to narrow the total number of records that appear in the list.

Note on Product and Trainee List Headers: The List/Edit choices for these two datasets function as follows:

1. In the Manage function for products, the number in the very bottom left-hand corner indicates the total number of products that have been entered, which is listed as ## entries.

2. In the Manage function for trainees, the number in the very bottom left-hand corner indicates the total number of trainees, which is listed as ## entries.

Searching Records

The Search feature provides an additional method, beyond using the List function, for locating a specific record or set of records.

The search screen has been configured to retain your search criteria on screen so that you can back out of search results and then modify the previously used search criteria. To clear the previous search criteria use the clear button at the bottom of the screen.

To use the Search function:

1. Hit Advanced Search under the appropriate dataset, on the navigation bar, to pull up the Search page.
2. Indicate the Fiscal Year (FY) for the record or set of records you want to locate. (Note that the default option is the current fiscal year.) If you want to search all FYs, select All Years at the beginning of the drop-down FY list and follow the instructions.
3. To search multiple FYs, first, click on a fiscal year in the Fiscal Year drop-down menu, then click on the multi year button. The selected year will display below the FY drop-down menu. Continue selecting as many FYs as desired using this method. To remove a year from the criteria, simply click on the appropriate numerical text.
4. To further define your search, use one or more of the four Other Search fields to specify your criterion or criteria:
   a. Indicate the field to search by in the When ... field (e.g., Fiscal Year).
   b. Indicate the type of relationship of that field to the search criterion/criteria in the Is... field (e.g., equal to). If you are unsure how each option works, click on the Need HELP? button and a window will pop-up, providing definitions for each option.
   c. Indicate the criterion/criteria of the selected field in the The Following... field. The criteria need to be typed in exactly as they are listed in the system's code. To assist in meeting this requirement, the system has a built-in feature where a list of valid searchable criteria for each field is displayed in a drop-down list, or instructions on the format to use when typing in criteria are provided automatically when the cursor is in the The Following... field.
   d. If you use only one of the Other Search fields, the system will select all records having any one of the criteria listed in that field, without requiring the records to have all of them. If you use more than one of the Other Search fields, the system will require that the records retrieved match the lowest common denominator of all of the defined criteria. For example, if you search by FY only, the list retrieved will include any record with one of the prescribed FYs. If you search by a set of prescribed FYs and by current funding amount over $100,000, the system will only pull records from the prescribed FYs AND whose current funding amount is over $100,000.
5. Once all fields for the search have been defined, click Search to retrieve all records that fit the parameters you have established. A list of records that were retrieved will appear with your defined search criteria listed at the top. From that point forward, selecting List/Edit will continue to retrieve that defined set of records until the search criteria are manually

changed.

Notes on Searching in Each Dataset:

Trainees: In addition to the standard FY search field and four Other Search fields that are included in the Search page under each dataset, the Trainees Dataset also has two additional predefined search fields: Discipline and Funding Sources. These fields may be used to search by those two criteria or a search may be conducted by one or both of those two criteria using the Other Search fields.

Projects: The Projects Dataset has the standard FY search field and four Other Search fields, as well as a *Key Words search field, which searches the Title, Key Words, and Description fields in project records.

Activities: The Activities Dataset has the standard FY search field and four Other Search fields, as well as a *Key Words search field, which searches the Title and Brief Description fields in activity records.

Products: The Products Dataset has the standard FY search field and four Other Search fields, as well as a *Key Words search field, which searches the Title and Description fields in product records.

***Key Word Searches:** In addition to being able to search for individual words in records of datasets that have a Key Words search field (Projects, Activities, Products, and Goals), searches also can be conducted for a phrase by enclosing that phrase in quotes. For example, searching for the phrase "developmental disability" will find records where this entire phrase is found. Conversely, searching for the term developmental disability without quotation marks will find records where the two words are found, but not necessarily together as a unit. These two approaches (phrases in quotation marks and individual words) also can be used at the same time. For example, searching for "developmental disability" research will find records that contain both the phrase developmental disability and the word research, but not necessarily the phrase developmental disability research.

Searching by the Added Date or Updated Date field in All Datasets

To search by a specific date in the Added Date or Updated Date field, define one search field as greater than or equal to the date you want (i.e., for the date 08/28/2012, enter '>= 8/28/2012') and then define a second search field as lesser than or equal to the subsequent date ('<= 8/29/2012').

Note: Additional instructions on how to use the Search function are contained at the bottom of the Search page for each dataset.

Viewing Records

To look at the information that has been entered in a record without changing that information:

1. Locate the record using one of two options:
   a. Use the Manage function (see the instructions for Listing Records above).
   b. Use the Search function (see the instructions for Searching Records above).
2. Once the record is located, click Manage and then click on View beside the record.

To continue viewing records in the same dataset, click Next (?) or Back (?) or use the Jump to feature on the top right corner of the View screen.

Save As

NIRS has a Save As feature, which was designed to alleviate programs re-entering data that are either the same as or similar to other years' data or the same as or similar to data that have already been entered for the current FY (e.g., repetitive activities, such as monthly project development meetings).

The Save As feature allows programs to pull up Activity, Product, Project, or Goal records from any FY and make changes appropriate for copying the record over to (or within) the current FY reporting period. Note that, for these four datasets, the FY will automatically be set at the current FY and cannot be changed. Trainee year records also have a Save As feature; however, the FY can be manually set to any year.

To access the Save As feature:

1. View the desired record:

   a. Either using the Manage function for current FY records (see the instructions for Listing Records above), or

   b. Using the Search function for previous FY records (see the instructions for Searching Records above).

2. Once the record is located, click on the View button beside the record.

3. Once in the View mode, you will see the Save As New button in the top right corner of the View screen.

4. Clicking the Save As New button will pull the record up in edit mode, with the FY set at the current reporting period for activities, products, and projects. For trainee year records, the FY field will display the current FY in the drop-down list, but the FY can be changed manually.

Note: If you pull up a previous year record that has already been saved as a current year record, a warning message will automatically pop up telling you how many times that record has already been saved as another record and asking you if you wish to continue. This will help prevent the inadvertent duplication of records into the current year but will not impose a limit on saving a record into or within the current year.

Special Notes on Activity Records with Affiliated Products or Projects: When using the Save As feature with activity records that have affiliated projects or products to be continued in the new data year, those affiliations will need to be redefined for the new record. If the affiliated projects or products are from a previous FY, they would first need to be copied over to the current FY using the Save As feature, and then re-linked to the current FY activity record. The system will prompt an error message directing you to do this.

Deleting Records

To delete a record:

1. Choose Manage for the desired dataset.
2. Click on the Trashcan/Delete icon beside the record you want to delete.

Notes on Deleting Trainee Records: All associated Trainee Year Records and surveys must be deleted before a Trainee Main Record can be deleted. If there are no Trainee Year Records or surveys for a trainee, there is a red Minus button (-) beside the trainee's name that allows the Trainee's Main Record to be deleted. If there are Trainee Year Records, the delete button can be found beside each Trainee Year Record for that trainee.

Notes on Deleting Contact Records: From the Directory tab on the main navigation bar, under the List/Edit function use the **Linked Products & Projects** column in directory data set to manage information that will be provided in the Projects, Products, and Activity contacts pull-down menus. **The Delete button will appear only when no Project or Product records are linked to the record.**Within each contact record, users can identify which project, product, or activity records are linked. Users can change the contact person for current and historical records by clicking on the link in the contact record, selecting a different individual from the pull-down menu, and clicking the Save button.

Activity Contacts: The Activity contacts list is managed using the Activity Staff choice from the Admin pull-down menu on the top navigation bar.

The reports are displayed on each dataset's Reports screen under 3 headers: ALL, UCEDD, and LEND. All standard reports can converted to PDF for saving and/or printing on 8.5 x 11 inch paper. All standard reports are enhanced to enable users to search across multiple fiscal years.

> **Note:** For many of the standard reports, users have UCEDD and LEND filter options. By checking the box next to the program type(s), the resulting report will be filtered to include only what has been checked.

- Check UCEDD to get UCEDD only records returned
- Check LEND to get LEND only records returned
- CHECK UCEDD and LEND to get ONLY those records that are identified as BOTH UCEDD and LEND
- To include all records, do not check either box (i.e., do not filter)

To run a standard report, follow these steps:

1. From the center of the Dashboard page, under the appropriate dataset box then go to View Data, click on Reports; or

On the main navigation bar, locate the desired dataset, and choose View Data.

2. Under Standard Reports, click on the name of the report ().

3. Specify any criteria required for that report (e.g., FY).

4. Hit Run Report.

5. The report will pop on your screen.

> **Note:** For multi year searches, the selected year will display below the FY drop-down menu. Continue selecting as many FYs as desired using this method. To remove a year from the criteria, click on the appropriate year. All data for the selected years is collapsed in the resulting report.

Customized Reports

The Custom Reports option allows NIRS users to create, save, and run reports (queries) using the NIRS database. Unlike Standard Reports which are accessible to all Centers, Custom Reports that you create are specific to your Center and are not viewable or accessible by other Centers.

Clicking on Edit Custom Reports on any Reports page brings the user to the Main Administration page. From this page, you may run, add, edit, or copy reports. Below are the options available on the Main Administration page:

Query Administration

The majority of options used in initiating and running Custom Reports are found in the Query Administration section of the page.

Present Results In (drop-down menu): The options are Browse, Download-comma, Download-tab, Labels, and Merge. Once a Custom Report has been created, the report's identified action will be used as the default action. If an action other than the default is needed, then just change it in the drop-down list and then click Go.

- **Browse:** Displays all of the fields from the query in a table on the screen.
- **Download:** Saves all fields from the query into a delimited text file for use in other applications.
- **Labels:** Saves the query data in a mailing label format. Note that the standard name and address fields need to be included in the query, otherwise you will receive a message saying that NIRS cannot find a field.
- **Merge:** Generates a general merge document which can be used for form letters.

Go (button): Click this button to execute or run an identified Custom Report.

Add (button): Add a new query to the system.

Edit (button): Edit an existing query in the system.

Copy (button): Copy an existing query in the system to modify and save with a new title.

Delete (button): Delete an existing query from the system.

All saved Custom Reports are displayed under Query Administration. For each Custom Report, the following information is displayed: Category (if used), Title, Date added or last used, Login name of the person who added or last ran it, and the Number of records it last returned. The list of Custom Reports is sortable by any of these fields by clicking on the appropriate column heading(s).

Parameters

Parameters may be set for cases when a Custom Report references certain criteria that may change frequently. In these cases, the criteria value (such as a fiscal year) can be stored as a parameter, then when the needed value changes, it can be edited here without needing to edit the Custom Report itself.

In addition to using the fiscal year, you might use a date range as a parameter. To create a date range parameter, you need to do establish two separate parameters: {{date1}} and {{date2}}.

> **Note:** If a parameter is used in any Custom Report, NIRS will not allow the parameter's deletion, a message will display indicating which Custom Reports are using it. Those reports would have to be modified to remove the parameter before the parameter could be deleted.

Merge Administration

The two merge output options are to merge data from a Custom Report with form letters or labels.

- Add (button): Create a new form letter or label.
- Edit (button): Select an existing form letter or label.
- Copy (button): Copy an existing form letter or label in the system to modify and save with a new title.
- Preview (button): Preview the form letter or label.
- Delete (button): Delete an existing form letter or label from the system.

Other Criteria

To temporarily add one or more criteria to an existing Custom Report, you can set the criteria here and then run the Custom Report. Note that once the report is run using the other criteria, it will return to its previous settings. The selection requirement will further restrict the records in the output. For a list of possible values in a field, select the field in the list on the left under When? and then click the corresponding ? button on the right.

Reference

As you plan your queries, it may help to visualize the overall database setup by having a diagram of how the tables are linked together. Click on Table Diagram to display some of the table data behind the query setup.

Tips on Creating and Using Custom Reports

Creating and Editing Custom Reports

You may create/edit Custom Reports using any of the fields in relevant dataset (Trainees, Projects, Activities, Products, and Goals). Use the following fields to determine the report criteria and organization:

- **Title:** The name of the Custom Report.
- **Default:** Create each Custom Report with an action: Browse, Download, Labels, or Merge. This creates a default action for this Custom Report; if an action other than the default is needed, simply change it in the Main Administration page using the drop-down menu and click Go.
  - **Browse:** Displays all of the fields from the query in a table on the screen.
  - **Download:** Saves all fields from the query into a delimited text file for use in other applications.
  - **Labels:** Saves the query data in a mailing label format. Note: the standard name and address fields need to be included in the query otherwise, you will receive a message saying that NIRS cannot find a field.
  - **Merge**: Generates a general merge document which can be used for form letters.
- **Category:** You may create your own categories under which Custom Reports may be organized.
- **Hide Border in Browse:** In some cases, it may be helpful for the Custom Report to display in the browse window without a table border. Checking this box will turn the border off.
- **Hide Detail:** If your Custom Report utilizes the Group and Subtotal function (as described under Sort and Group By below), checking this box will cause the Custom Report to display only the subtotal (s) without displaying all the detail rows of the report.
- **Distinct:** In some cases, you may create a report that displays multiple year records with identical names (trainees with multiple year records, multi-year projects, or products disseminated over multiple years). Checking this box will cause the Custom Report to display such "distinct" (i.e., identically named) records only once in the report.
- **Full Memo Fields:** Each dataset within NIRS has Memo fields that can be incorporated into a Custom Report. Memo fields allow users to enter any characters, with no restriction on type or format. A Memo field is commonly used to store longer descriptions, statements, etc., which cannot be categorized in the system like phone numbers, dates, etc. Because there may be substantial content within Memo fields, the default format in the browse window is to display such fields in a scrolling text box. Check this box to display Memo fields at their full length. Current Memo fields are:
  - GOALS Description (M)
  - GOALS Notes (M)
  - PROJECT Project Description (M)
  - OBJECTIVE Description (M)
  - ACTIVITY Brief Description (M)
  - ACTIVITY Staff Involvement (M)
  - PRODUCT Description & Special Features (M)
  - SURVEY Professional Achievement (M)
  - SURVEY Leadership Activity (M)
  - SURVEY LEND Positively Influenced Areas Exp (M)
  - SURVEY LEND Recommend Explanation (M)

Notes: Any miscellaneous notes to record with the query. This may include notes on when to run the report, its meaning, etc. The notes will display on the Custom Reports set up screen but will not display in the Custom Report itself.

Selected Fields: A list of all the fields in the relevant dataset from which you may select is displayed. The list is displayed using a standardized format: the name of the dataset is displayed in CAPS, then the name of the field, and finally the type of field is displayed in parenthesis; for example: TRAINEE First Name (T). The field types are: Text (T), Number (N), List (L) or (E), Date (D), and Memo (M). Fields marked with an * are the ID numbers automatically generated by NIRS.

- To select a field for inclusion in a Custom Report, either (a) click once on the item and then click on the Include button or (b) double-click on the item. To select multiple fields at once, hold down the Control key while single clicking on items, then click Include button.
- To remove a field or fields that were already selected for inclusion, use the same process on the selected fields (displayed on the right), then click the ?Remove? button.
- To change the order in which fields with appear, click a field and then click the up or down arrow buttons displayed to the right of the list of fields.

Selection Criteria: Once the fields to be included in the Custom Report have been selected, you may select the criteria for inclusion or exclusion of records in the Custom Report.

- First select the field under When?
- Then select the inclusion/exclusion criteria under Is (e.g, blank, not blank, equal to, not equal to, greater than, etc.).
- Finally, for a list of possible values in a field, click on the ? button.* Clicking on any of the displayed values will make that value appear under The Following. Alternatively, you can simply type in a value in the text box under The Following.

*When you select a Date (D) field under When?, clicking on the ? button brings up a dialog window with different options for calculating a date or dates in relation to the date the Custom Report is run. For example, the query might include or exclude any records in a particular number of days/weeks/months or years in the past or future.

Sort and Group By: You may control the order of the records in the Custom Report by selecting certain fields using the same processes described in Selected Fields above.

- To sort in descending order, click the Descending option, and then include the field.
- To sort in ascending order, click the Ascending option, and then include the field.
- To group and subtotal records, use the drop-down menu to provide the appropriate number in the Group and subtotal on the first X fields? box.

Custom Report Viewing

When viewing the results of a Custom Report, the browse window offers a few helpful features:

- **Highlight:** As you scroll up and down the Custom Report window, the cursor will highlight a row as it passes over it. To freeze the highlight on the row to make it visible as you scroll right and left, click the record. As you scroll up, down, left, or right, only this row will be highlighted. To unfreeze, click anywhere again.
- **Sorting:** Any of the column headers may be clicked on to cause the report's data to be re-sorted by that column. Note that blank fields always sort to the top of the list.
- **Paging:** To reduce the load time of the webpage, the records are broken down into smaller chunks that are browseable using the First, Back, Next, and Last buttons at the top. To change the number of records displayed in a continuous report on the screen, edit the number in the Show box and click the Refresh button.

Tips on Creating and Using Merge Administration

The two merge output options for the results of a Custom Report are to merge data from a Custom Report with form letters or labels.

Creating/Editing Form Letters or Labels

In the Merge Editing page, provide a title for the letter or label. For either format, the Message Body field contains (a) the text you supply and (b) links to the fields in a Custom Report.

To insert database fields into the message body, double click on a field name in the list to the right. This will automatically insert the selected field name(s) at the top of the message body;

each field name can be cut and pasted into the appropriate position within the message.

Note: The Merge Editing page defaults to a plain text Message Body that does not support bold, underline, or other HTML formatting. Click on the Change to HTML Editor button to get the Message Body to support those functions.

Merging
Click on the radio dial of the Custom Report from which you want to merge, then click on the radio dial displaying next to the form letter or label you want to merge to, select Merge or Labels from the Action drop-down menu (if necessary), then click the Go button under Query Administration.

Special Syntax

- The curly braces {{ }} around any text indicates to NIRS that the text is a field name.
- To include the current date in the form of month day, year type in {{today}}.
- To indicate that a line is to be skipped if it is empty (such as a blank address line), surround the line with square brackets. Example: [{{address2}}]

Special Notes on Labels

The Avery number for standard mailing labels is Avery 5160. If you want to use an Avery format other than 5160 (for shipping labels, file folder labels, name tags, etc), type a standard Avery number into the field at the bottom of the Merge Editing page. If there are newer Avery numbers that are not recognized by the system, let AUCD know so that the list can be updated.

The label function can also be used to create name badges or any other format for which you have an Avery number. For example, to create name badges, setup a merge format with only the name fields listed. Then select the radio button next to this merge format when running the labels.

Special Notes on Form Letters

The merged query of form letters will appear in a browser window. Before printing, use the browser toolbar (file, page setup) to make necessary format changes, such as appropriate margin settings for your letterhead. Note that the default setting may include a header and/or footer, which should be deleted from the page setup dialogue box prior to printing.

SAMPLE FORM LETTER TO TRAINEES

{{today}}

{{first}} {{last}}
{{homeaddress1}}
[{{homeaddress2}}]
{{homecity}} {{homestate}} {{homezip}}

Dear {{first}},

As a graduate of the NAME Program at the CENTER NAME at the UNIVERSITY NAME, I hope that you will help us continue to improve the program by taking a moment to complete an online survey to help us learn more about the experiences students have had since completing our program.

This survey should take no more than 5-10 minutes to complete, and your responses will be treated confidentially. Please login in and complete the survey before May 30 of this year.

To complete the survey, go to **(use survey link specific to your center)**. Select ST-CENTER NAME from the drop-down menu and use the following login code: {{ Provide TraineeID here}}. After completing the survey, click on the Submit button to electronically submit your responses.

Please contact me directly at PHONE or EMAIL if you have any questions, and thank you again for completing this survey.

Sincerely,

Cleaning Data

Run the standard report, Data Entry Error for each dataset to determine what records appear to have missing or duplicative data. Open the identified records and make appropriate corrections.

Correcting Trainee Errors

The Trainee Duplicates may be found through the search function. Select All Years and all trainee records will be displayed.

Missing Year Records may be found through the search function. Select All Years and all trainee records will be displayed. Simply add the appropriate year record.

1. For the Trainee Main Contact Records that are missing a Trainee Year Record, run a Search under the Trainee Dataset, selecting All Years in the Search Fiscal Year field. Scroll to the Trainee Main Contact Record that is missing a Trainee Year Record and click on the Add button beside the trainee's name. Supply all required information and click Save.
2. For the duplicate records, view each Trainee Main Contact Record and determine which one you want to keep. Ensure all necessary information, including demographic information, links to activities and survey data, etc. are all in the record to be kept, before deleting the extra record.
3. Once you have entered all of the required information, click Save.

Correcting Project, Activity & Product Errors

1. To identify the records that contain errors, go to the Reports page of the appropriate Dataset. Click on the standard report [Trainee/Project/Activity/Product] Data Entry Errors, select the current FY and click Run Report.
2. Click on the record name, and this will take you to the record page (View page for Trainee records and Edit page for all other datasets). If Viewing a Trainee record, click on the Edit button to update it.
3. Provide an entry in all of the empty required fields, even if you select an option such as Not Applicable.
4. Once you have entered all of the required information in the record, click Save.

User Access

NIRS has been designed to allow for five different levels of access to the system, depending upon user need and administrative policies for each program. The five levels of access include:

- Read Only users have access to view all data fields, except for personal/contact information in trainee records.
- Read/Write Own users have access to view all data fields, except for personal/contact information in trainee records that they did not create. They may edit records they created, as well as product records that they did not create but are linked to activity records they created.
- Read/Write users have access to view and edit all data fields.
- Assist users have acess to the specialized reporting functions of Admin users, but cannot add or edit data.
- Admin users have Read/Write all access and access to specialized reporting functions and modules. They can also export data and add/edit users.

For users with Admin access, the following steps should be followed to define user access levels for their program's users:

1. On the main navigation bar, from the Admin pull-down menu, choose Mange NIRS Users Login.

2. To create a new user login and establish a level of access, click + Add at the top of the page beside User Logins and follow these steps:

- Enter first name, last name, and a valid email address for the user.
- Enter a login name, using a minimum of 6 characters. Letters, numbers, and symbols may be used. It is not case sensitive.
- Enter a password for the user, using a minimum of 6 characters. Letters, numbers, and symbols may be used. The password is not case sensitive.

- Select a level of access from the drop-down menu.
- Select the datasets for which the individual may have access to.

3. Once you have entered all of the required information in the record, click Save.To modify an already existing password and level of access, select Edit beside the applicable login:

- Modify name and email fields as desired.
- Select a new level of access from the drop-down menu.
- Enter a new password for the user, using a minimum of 6 characters. Letters, numbers, and symbols may be used. The password is not case sensitive.

To simply look up a user's login, password, or level of access, consult the list of user information that appears in the User Logins page.

For existing users with read only, read write/own, and read write level of access:

a) For FY10, users attempting to login the NIRS system using an existing login will be directed to an online form to update any missing information.

b) After completing step a) users can manage their login information by accessing the pull-down menu under NIRS, in the top navigation bar called My Profile. If the user is linked to any activity, product, trainee, project or goal records, the records would be displayed, organized by datasets.

User-Defined Fields

To better meet programs' unique data needs, individual programs may add up to 10 fields to each dataset. Users must have Admin access to define these fields.

To create a user defined field:

1. On the main navigation bar, from the Admin pull-down menu, select Manage User Defined Fields.
2. Hit Edit beside the field for which you want to provide a label, type in a label, and click Save.
3. The next time you access the entry form for that dataset, you will see the field(s) you defined with the label(s) you provided.
4. To change the label on a user-defined field, follow steps 1.-3.
5. To remove a user-defined field, follow steps 1. and 2. Instead of typing in a new label, erase the current label leaving the text box blank and click Save.

Starting in FY2007, Centers have been provided with the authority make their user defined fields required. As with the rest of NIRS, required user defined fields are marked with an *, and failure to supply information in a required user defined field will result in a pop up window (saying there is a required field marked by an * at the bottom of the screen) when the user attempts to save a record without completing a required field.

Centers can inactivate user defined fields. When a field is inactivated, it will no longer display in the relevant data entry form, but the data will be maintained in NIRS and continue to be accessible through the custom report function.

A tool to create drop-down list of options in any user defined field has been added.

For these functions, begin with Admin menu on the main navigation bar and choose User Defined Fields. Click on Edit next to an existing user defined field to edit it or click on edit next to a field that is not defined.

Check/uncheck the Required and Inactive check boxes as desired.

Type each desired choice from a drop-down list of options in the text box. Type each choice on its own line within the text box.

Beginning with FY2007, the system has been reconfigured to print/use the center defined labels of user defined fields, rather than 1, 2, etc. when importing/exporting.

> **Note**: when importing, the labels must match exactly.

NIRS allows for importation of data into user defined fields.

UCEDD Annual Report to AIDD

Overview

In FY06, the Annual Report function in NIRS was established to enable UCEDDs to create and submit their annual reports to AIDD in an electronic format that complies with the data collection approved by OMB (control number 0970-0289) with an expiration date of 1/31/2012. For the FY07 and FY08 versions of the report, some minor cosmetic changes were made.

In FY 2013, a new UCEDD Annual Report template was implemented in NIRS.

These instructions are intended to assist UCEDDs in completing and submitting their reports to AIDD using NIRS. To that end, some general information about content requirements is supplied. For specific guidance on AIDD requirements, definitions, etc., please consult the AIDD publications **UCEDD Annual Report Template and Attachment C: Definitions and Measures**. Finally, these instructions inform the reader about where the data elements that pre-populate the report are drawn from in NIRS

The report, which covers the annual reporting period of July 1 through June 30, is due to AIDD by July 30 of each year. It includes:

- Automatically populated information from a Center's current fiscal year using data from all of the NIRS datasets (Projects, Activities, Products, and Trainees)
- Narrative information provided by the Center prior to finalizing the report
- Optional supportive information and materials

Visit ACF Office of Financial Services at http://www.acf.hhs.gov/programs/ofs/forms.htm for additional grant related documents and forms.

Design Issues

Access to the Annual Report function has been limited to users with an Admin level of access.

The report is designed to be created, modified, and saved multiple times before being finalized and electronically submitted to the appropriate AIDD Project Officer. The final report is submitted to the Project Officer in a portable document format (PDF). To confirm that the report has been transmitted, the PDF of the final report will also be simultaneously emailed to one individual at the UCEDD (as selected by the UCEDD).

Upon submission of the report to AIDD, the PDF of the report is also preserved in NIRS for archival purposes. Access to the archived PDF is limited to those with an Admin level of access. The PDF may be downloaded and saved locally. The report has been specifically designed so that any automatically populated data in the report is not editable in the report itself. However, the data that feeds into the report may be modified during the data cleaning period. When the relevant records in NIRS are cleaned or corrected, the data in the report will be updated.

> **Note**: All the text boxes in the report are extremely large. There is no danger of exceeding the amount of available space with your responses.
>
> **Note**: The text boxes do not contain a spell check option. We strongly recommend composing any narrative responses in a word processing program and then pasting the spell checked text into the text boxes.
>
> **Note**: The text boxes do not support any formatting, such as bold, underline, italics, font color, or bullets; charts; or graphics. Text can be set off in a bullet-like fashion by using an asterisk, dash, and/or lower case "o." The optional attachments feature on the cover page data entry form can be used to include documents with these formatting needs.

Report and Data Entry Structure

The final report consists of (a) a cover page (which includes an introduction, and (b) the body of the report (which includes the optional appendix and attachments sections)

The cover page will display as the first page in the final report, however, it is managed as a separate form in the data entry process. In addition to managing information for the cover page of the report, the cover page data entry form provides the mechanisms for capturing the Introduction section as well as for uploading any (up to a maximum of 10) optional attachments.

The report is designed to be completed/submitted using the following order and processes

1. Complete the body of the report (and the optional appendix if desired)
2. Complete the cover page data entry form (which includes the introduction and optional attachments)
3. Preview the entire report and cover page using the View function
4. Modify report and cover page as needed
5. Submit the final report to AIDD from the View function

Note: An initial version of the report may be saved even though data has not been entered into all of the required fields.

Unless otherwise indicated, consider all fields of the report required.

Creating the Report

Access to this report is limited to those with an Admin level of access. To create the report:

1. Log into NIRS
2. From the Admin pull-down menu on the navigation bar, choose Program Performance Reports (PPRs).
3. Look in the main field of the screen. Click on the Add button next to the word Report (located directly beneath the header titled Annual Reports).

You may begin adding information to the report. This report may be modified and saved multiple times before it is ultimately submitted to AIDD. Once the initial version has been saved, click on Edit to open and edit the report.

Once an initial version of the report is saved, the **cover page** data entry form will be displayed.

Once an initial version of the cover page data entry form is saved, the **View** function will be displayed.

THE BODY OF THE REPORT (and the Optional Appendix if desired)

Note: The Introduction is part of the Cover Page. The body of the report is comprised of Parts 1-4 and the Optional Appendix.

Part 2: UCEDD Annual Report

Part 2 of the report relates to the

- UCEDD's goals (as described in its ADD core funding grant)
- Funds that the UCEDD leveraged using its ADD core grant

Section 2A: Narrative Report on Goals

For **each** goal record in the Goals dataset, this section of the report provides:

- A table automatically populated with the goal itself, as well as its areas of emphasis, core functions, types of activity, and objectives.
- A choice of selections to indicate the extent to which the goal was achieved.
- Two text boxes:
  - One to provide a narrative **update on the progress** achieved in meeting the goal, describe noteworthy strategies, and/or discuss objectives or activities relevant to this goal. This text box is the place to share narrative information on both the breadth and depth of your work related to a particular goal.
  - One to provide **proposed revisions** to goal. Revisions may include the **modification** or **deletion** of the current year's goal and/or the **addition** of a new goal for the next fiscal year.

Note: If you do not intend to revise the goal, we suggest supplying a sentence to that effect (i.e., There are no proposed revisions to this goal for FY09).

Note: If you do modify, delete, or add a new goal for the next fiscal year, you must manually make that change in the Goals dataset once the FY10 dataset opens. NIRS will not make that change for you.

Section 2B: Funds Leveraged

Section 2B of the report relates to the funds that the UCEDD leveraged using its ADD core grant. This section of the report is automatically generated using information in the Projects dataset. The current fiscal year's core funding amount for each Center is automatically subtracted from the funding information recorded in the current fiscal year's Projects dataset, **therefore Centers must include their core funds from ADD in this dataset.**

Note: The core funding amount for FY 2012 is $535,000.

Part 3: UCEDD INDICATORS OF PROGRESS

Part 3 of the report relates to measures of improvement and consumer satisfaction, organized by core function. Although the data entry screens in NIRS uses intuitive labels for the core functions, this report uses the actual language required by ADD. The core functions are:

1. Interdisciplinary Pre-Service Preparation and Continuing Education
2. Community Services: Training & Technical Assistance
   Community Services: Direct Services & Demonstration Projects
3. Research
4. Information Dissemination

Section 3A: Measures of Improvement and Consumer Satisfaction

For **each** core function, this section of the report provides:

- A core function table automatically populated with required language and quantitative data for improvement measures and consumer satisfaction measures.

- Two text boxes related to the consumer satisfaction measures (except for the Research core function).

Core Function Tables

For each core function, a table is automatically generated. The tables contain information primarily drawn from the Activities dataset; however information from the Products dataset is also used in one of the tables.

Interdisciplinary Pre-Service Preparation and Continuing Education: The number of *trainees* is the sum of long-term and intermediate trainees identified as UCEDD trainees.

Community Services: Training & Technical Assistance: The number of *individuals* is the sum of the "total participants" field(s) in the relevant activity record(s).

Community Services: Direct Services & Demonstration Projects: The number of *individuals* is the sum of the "number of clients seen" (for clinical services), + the "number of unduplicated individuals to whom the above services were provided" (for other direct services), + the "total participants" (for all others) field(s) in the relevant activity record(s).

Research: The number of research activities is a count of the number of relevant activity records.

Information Dissemination: The number of products is a count of the number of relevant product records that are linked to Information Dissemination activity records. To complete the Consumer Satisfaction Measure in this section, the UCEDD must survey at least 50 visitors of their website in regard to satisfaction with the information available on the UCEDD's website. The consumer satisfaction data is pulled from those activity recordsto be entered directly in the Annual Report, as it is not stored in any of the Activity records.

Within each core function table, the data is organized by Area of Emphasis. Areas of Emphasis that are not represented for a particular core function in a UCEDD's data will not display in the table. All consumer satisfaction data captured in UCEDD or UCEDD/LEND Activity records are displayed in the core function tables. Where no consumer satisfaction data was captured, the appropriate cell in the table is lightly shaded gray.

Although all consumer satisfaction data will be displayed, UCEDDs must report consumer satisfaction data for only one Area of Emphasis. The Area of Emphasis selected will be the same for each of the core functions. **The Area of Emphasis for which a UCEDD will report consumer satisfaction is selected on the cover page data entry form.**

Once an Area of Emphasis is selected:

- The following text will display directly under the Section 3 header in the report:

The Area of Emphasis for which Consumer Satisfaction data is reported as required is X. Additional consumer satisfaction data is also displayed below.

- The appropriate row in each of the core function tables will be shaded light green to visually distinguish the Area of Emphasis selected by the UCEDD for consumer satisfaction reporting purposes.

Note: The selected Area of Emphasis may be changed until the report is finalized and submitted to ADD.

Note: The selection of the Area of Emphasis is at the discretion of the UCEDD. UCEDDs may report consumer satisfaction data in the same Area of Emphasis from year to year or may select a different area each year.

Text Boxes Related to the Consumer Satisfaction Measures

For each core function except Research, Centers must provide additional information on their measures of consumer satisfaction. No consumer satisfaction information is required for the Research core function.

Response Rate Explanation Use the first text box to report the **aggregated** response rate for the selected Area of Emphasis in that core function, and if necessary, provide additional information.

Beginning with the FY08 report, the response rate is automatically calculated in the report. If the aggregated response rate for the selected area of emphasis is 30% or greater, no explanation is required and the text box is inactivated.

If the response rate is less than 30%, discuss the likely reason(s) why the response rate was less than 30%.

Sampling Procedures Use the second text box to indicate the sampling procedures that were used.

- If random sampling techniques were used, indicate that information (i.e., Consumer satisfaction for the identified area of emphasis was determined using random sampling.)
- If non-random sampling techniques were used, (a) describe the techniques used and (b) explain why those techniques were used.

3B: Measures of Collaboration

Section 3B of the report relates to collaborative efforts across the 3 programs in the DD Act (UCEDDs, DDCs, and P&As). In addition, this section provides one optional question related to UCEDD collaborations with other partners.

Question 1 The first question asks the UCEDD to identify critical issues/barriers in its state that were jointly identified with the DDC and P&A.

Question 2 The second question is a 6-part question that directly relates to the answer given in the first question. The UCEDD is asked to take at least one of the issues/barriers identified in the first question and provide a response to each of the 6 parts of question 2.

Note: Six text boxes are provided: one for each of the 6 parts of the question. We suggest that if more than one issue/barrier is addressed in this question, UCEDDs should clearly differentiate the issue/barriers in each text box by using headers.

Question 3 The third question is optional. It was added to the report based on the feedback the UCEDDs provided to ADD and OMB during the public comment periods. A response to this question is not required. If no text is provided in this text box, the Optional Reporting Elements header and related text will not display in the final report. One text box is provided for this question. We suggest that UCEDDs use headers, if appropriate, to differentiate the material supplied in this text box.

Part 4: GPRA MEASURES

Part 4 relates to 2 GPRA measures that ADD will use, among other things, to report to Congress on the achievement of their Strategic Plan. This section of the report draws from the Trainee dataset.

This section of the report provides:

- A table automatically populated with the results of your trainee follow-up surveys.
- A text box for you to indicate **the number of trainees** to whom follow-up surveys were sent during the current fiscal year.

Note: Record the number of trainees to whom surveys were sent, **not** the number of surveys. No matter how many attempts (i.e., emails to/copies of the survey sent) you make to reach trainees, you should only record the number of individuals that you tried to survey.

Optional Section: APPENDIX

The Appendix is optional. It was added to the report based on the feedback the UCEDDs provided to ADD and OMB during the public comment periods. Completion of the Appendix is not required. If no text is provided in this text box, the Optional Appendix header and related text will not display in the final report. One text box is provided for UCEDDs to supply additional noteworthy information. We suggest that UCEDDs:

- Use headers, if appropriate, to differentiate the material supplied in this text box.
- Clearly indicate the applicable Areas of Emphasis and/or Core Functions for any outcomes presented.

THE COVER PAGE (including Introduction and Optional Attachments)

The cover page data entry form will appear once an initial version of the report is created and saved by the UCEDD. This data entry form also manages the report introduction and optional attachments.

Most of the elements on the completed cover page itself will be automatically generated. A small amount of additional information is required from the UCEDD to complete the cover page. AUCD will maintain and annually update the following information that will display on the completed cover page for each UCEDD: ADD Project Officer, ADD Grant Officer, ADD Grant Number, ADD core funding levels, and the current performance period.

Please contact Corina Miclea (cmiclea@aucd.org) or Dawn Rudolph (drudolph@aucd.org) via email or at 301-588-8252 if the information displayed for your Center appears to be incorrect or if you need assistance locating your login and password.

The cover page uses the same contact information that is listed in the UCEDD Directory on the AUCD website. To correct any contact information errors, simply update your Center's directory information. The UCEDD Directories are password protected. Once information in the data entry form is saved, a completed cover page is viewable.

Cover Page Data Entry Form

UCEDDs must provide their:

- **Project Title** (from their core funding grant application to ADD). This information will be saved for future years' reports, and may be edited with each funding cycle.
- **Principal Investigator** (from their core funding grant application to ADD). A drop-down menu is provided of individuals listed in the UCEDD Directory as either UCEDD Director or Associate UCEDD Director at the Center.

Report Author: A drop-down menu is provided of individuals listed in the UCEDD Directory as either UCEDD Director or Associate UCEDD Director at the Center.

> **Note**: Although we recognize that may people at the UCEDD will contribute to the report, the selection of **one** author is intended to identify the appropriate senior-level individual at the UCEDD which ADD may contact with questions, clarifications, etc. about the report. The principal investigator and the report author may, but do not have to be, the same person.

UCEDDs must select an individual at the Center to receive a PDF of the final report via email when it is submitted to ADD. A drop-down menu is provided of individuals (and their emails) listed in the UCEDD Directory as either UCEDD Director or Associate UCEDD Director at the Center.

UCEDDs should provide an **Introduction** (Part 1 of the Report) or summary statement of their progress this year (note that the text box does not have a spell check option). The Introduction will display in the annual report document immediately after the cover page and immediately before the body of the report.

UCEDDs must select the **Area of Emphasis** for which it will be reporting on measures of consumer satisfaction for the current year.

UCEDDs may attach up to **10 attachments** to support their report because the text boxes in the body of the annual report function do not support charts, tables, or graphics. Attachments may be submitted in the following file formats: word, excel, ppt, jpg, gif, and pdf. For all other formats, covert the document to a pdf before uploading. The maximum size for each attachment is about 1 megabyte (MB).

Upload attachments by using the Browse button. Remove an attachment by clicking on the word remove displayed to the right of the file name.

If attachments are provided by a UCEDD, NIRS will create and append a page entitled Optional Attachments to the end of the Annual Report. The page will display live links for each attachment uploaded by the UCEDD using the following system:

Attachment A: filename.doc

Attachment B: logo.jpg

We strongly suggest that UCEDDs reference any supporting attachments in their narratives by letter (i.e., see Attachment B), rather than by file name (i.e, see logo.jpg).

If no attachments are supplied by a UCEDD, NIRS will not create an Optional Attachments page for their report.

Once a version of the cover page data entry form is saved, the annual report (including the Cover Page, Introduction, 5 required sections, Optional Appendix, and Optional Attachments) may be seen by clicking on **View.** Fields are flagged in orange if no content has been provided and the field is required.

Completed Cover Page

The information is displayed on the cover page is drawn from the following sources:

- Date of Report: auto generated
- ADD Project Officer: maintained by AUCD
- ADD Grant Officer: maintained by AUCD
- ADD Grant Number: maintained by AUCD
- UCEDD Name: Program Name field in the UCEDD Directory
- Address: the UCEDD Directory
- Phone: Main Phone field in the UCEDD Directory
- Period of Performance: maintained by AUCD
- Project Title: cover page data entry form
- Principal Investigator: cover page data entry form
- Report Author: cover page data entry form

PDF button: A PDF button is located in the upper right corner of the cover page in View for your own use. Click on this button to create a PDF of the report, including the cover page, at any time. The PDF may be saved locally.

Submit to ADD button: A Submit to ADD button is located in the upper left corner of the cover page in View. This button will be displayed shaded in a light gray and not be functional for submitting the report until information has been supplied in each of the required fields. Areas where required content is missing are flagged in orange. Once information has been added to each of the required fields, the button will display in green and may be used to submit the report. Clicking on this button will automatically submit the final report (in PDF) to ADD and cc the individual you identified to receive a copy. As a failsafe, users who click this button will see a pop up asking Do you want to submit this report to ADD now? with a Yes and a No option.

- If Yes is selected, the report will be submitted.
- If No is selected, the user will be returned to the View screen.

The dataset allows Admin users to manage their Center's or Program's directory information. For UCEDD and/or LEND Programs, the information entered in the Directory dataset in NIRS is displayed in the online directory on AUCD's website, and individual staff can update their own profiles.

AUCD expects that Centers and Programs will determine for themselves which staff to include in the public facing directory but encourages Centers and Programs to use this function to develop and maintain a comprehensive dataset of demographic information on staff.

Directory Managers

One or more individuals at a Center or Program may be identified as Directory Managers by checking the Directory Manager box in the user login management feature under the Admin tab on the top navigation bar. Directory Managers must have an Admin level of access and have the Directory dataset checked in the user login management feature. Directory Managers will

- Have the ability to create profiles
- Have the ability to remind staff to update profiles
- Receive notification that individual staff profiles have been updated
- Have the ability to accept or reject those profiles
- Set display settings for individual profiles
- Manage Center information

Accessing the directory:

Directory Managers and others with an Admin level of access can access the directory through the Directory tab on the top navigation bar in NIRS.

Individual staff may enter a new profile or update their existing the directory login at http://www.aucd.org/template/login.cfm. This link is provided in the upper right and lower right corners of their public facing profile page. Individuals can save and return to an initiated profile or profile update multiple times before submitting it for approval.

Definitions

Council Membership. A required field in the staff profile is affiliation with one or more AUCD Councils OR NA. Beginning October 1, 2009, AUCD will dynamically populate the Council membership list on the AUCD website from the directory profiles.

Directory Status (for UCEDDs and/or LENDs only). There are 6 status conditions for profiles in the directory: Display, Not Display, Inactive, Pending Submission, Waiting for Approval, or Rejected.

Display: Profile displays in public facing directory, data is available for public search and standard reports.
This status is intended for staff currently employed at Center and for which the Center wishes to make contact information available through the directory. AUCD anticipates that senior and mid level staff would be included in this category.

Not Display: Profile does not display in public facing directory nor available for public search, however is available for standard reports.
This status is intended for staff currently employed at the Center (or the COCA representative who is not an employee) but for which the Center does not wish to make contact information available through the directory. The profile allows Centers to capture and manage demographic information on staff that is of interest to AUCD and may be useful to Centers in preparing grant applications. AUCD anticipates that support staff might be included in this category.

Inactive: Profile does not display in public facing directory, nor is it available for public search, however it is available for standard reports.
This status is intended for staff no longer affiliated with the Center, but for which the Center is not yet ready to delete their profile. An example for which this status might be chosen is a for an MCHB training program staff person who resigned 10 months into a 12 month project. The training program may not want to delete the profile immediately as it wants to report on the person's activities at the end of the project year. The Inactive status may be used to both keep the profile but not display the profile.

Pending Submission: Profile does not display in the public facing directory, nor is it available for public search.
This status reflects that a profile has been initiated but not submitted for approval.

Waiting for Approval: Profile does not display in the public facing directory, nor is it available for public search.
This status reflects that a profile has been submitted for approval/rejection.

Rejected: Profile does not display in the public facing directory, nor is it available for public search.
This status is intended for profiles that are not acceptable to the Center for display for any number of reasons. Once rejected, the staff person may edit the profile and resubmit. AUCD anticipates that the primary reasons for profiles to be rejected are

- Photos that are anything other than the person in the profile (i.e., not a pet, building, abstract image, etc.) presented in a professional manner.
- Profiles of individuals not employed at the Center.

Include this person in EHB upload (Yes/No). For MCHB Training Programs (LENDs, LEAHs, PPCs and DBPs): starting FY2012, if yes is selected, AUCD will include the appropriate staff information in the upload file to the DGIS/EHB.

Member Affiliation(s). For those Centers that house both a UCEDD and a LEND, the Directory Manager should select the programs in which the staff profile should appear: UCEDD, LEND, or both by checking all that apply.

Directory Features

The submenu options under the Directory tab on the top navigation bar are Dashboard, Add Contact, List/Edit, Reports, and Dictionary.

Dashboard

The first submenu option, Dashboard, is designed to be the Directory Manager's one stop shop for multiple functions.

My To Do List - The first visible item on the Dashboard is the To Do List. This feature alerts the Directory Manager to the number of staff profiles (applications) that are waiting for approval.

Add a New Staff Profile

Using the Add button, the Directory Manager can add a new profile.

Manage Center Information

Using the Edit button, the Directory Manager can edit the Name, Address, Phone, Email, and URL that will appear on the public facing directory page for their center.

From the edit screen, the Directory Manager can upload a logo for the Center as well as the Center's Annual Report.

- Logo: use the browse button to upload the image from a local file. Once the record is image is saved, users can remove the image by clicking on the remove link.
- Brochure: The label Brochure is used to distinguish this feature from the UCEDD Annual Report to ADD; however the intention is provide Centers with opportunity to post their annual stakeholder document (annual report) in the public facing directory. Once the document is saved, users can remove the document by clicking on the remove link.
- Brochure title: Provide the title of the report, which will be the hyperlink label.

Add Faculty/Staff Profile

The second submenu option, Add Faculty/Staff Profile, is designed to allow the Directory Manager to add new profile for a staff person, rather than providing particular staff with the link to create a profile. AUCD anticipates that Directory Managers may choose to add profiles for

- Support staff for which the Center does not anticipate displaying in the directory.
- COCA representatives that are not employed at the Center.
- Staff who require assistance or accommodations in relation to the online system.

Manage Faculty/Staff Profiles

The third submenu option, Manage Faculty/Staff Profiles, is designed to allow the Directory Manager to view all staff profiles, view user names and passwords, link and unlink projects and products, change the status of profiles, view the last updated date of profiles, and email reminders to update profiles.

- Column headings that are underlined are sortable by clicking on the heading.
- The Edit button is used to edit the profile.
- The Delete button is used to delete the profile. Profiles can only be deleted when all linked product records are unlinked from the profile and assigned to other staff.
- The Go To link is used to view linked records. To unlink a record, click on the hyperlinked title, select another staff profile from the pull-down menu, and click Save.
- ID numbers are provided to help users distinguish between multiple profiles that may display for a single staff person.
- To change the username and password for a profile user, click Edit.
- To change the status of a profile, select the desired stats from the pull-down menu.
- To email staff to alert or remind them to update their profile:
    - Click Email Entire List to send an email to all staff in directory OR
    - Check the check boxes for select individuals and then click Email Selected Contacts.

Staff will receive the following email from do-not-reply@aucd.org:

Subject Line: Please review and update your AUCD Directory Profile
Body of Email: The AUCD Directory is used by members of the AUCD network, federal agencies, and the general public every day. Please take a few moments to review and update your AUCD Directory profile to ensure that it is up to date and accurate.
Login at http://www.aucd.org/template/login.cfm
Username: {automatically provided}
Password: {automatically provided}

Reports

The fourth submenu option, Reports, is designed to allow the Directory Manager and individuals with an Admin level of access to run both standard and custom reports on data available in this dataset.

The Standard Reports currently available are:

- Faculty and Staff Information-MCH Reporting: Displays report of MCH reporting elements on faculty/staff.
- Staff Race and Ethnicity: Displays race and ethnicity data for staff by primary employment role
- Staff Gender: Displays gender data for staff by primary employment role.
- Staff Age and Years of Service: Displays mean age and years of service for staff by primary employment role.
- Staff Personal Relationship with Disabilities: Displays percentage of staff who report one or more personal relationships with disabilities by primary employment role.
- Staff Disciplines: Displays number of staff who identify with particular disciplines. Note that individuals may identify with more than one discipline in their profiles.
- Staff Expertise: Displays by staff name, their identified discipline(s) and areas of expertise in research, education, and service.
- Directory Expansion Status: Displays by staff name, the content of the directory. An "x" represents that content has been provided in the following fields: discipline, areas of interest/expertise, vita, and photo.

Custom Reports can be developed and run on any fields in the directory dataset

Dictionary

The fifth Directory menu option, Dictionary, is a link to the Data Dictionary chapter on the dataset.

Automatic Emails

The system is set up to automatically email individuals who interface with the Directory functions. The email will come from do-not-reply@aucd.org.

Users who start and save a new profile will receive the following email:

Subject Line: Your AUCD Directory profile is waiting to be finalized
Body of Email: Thank you for starting your AUCD Directory profile.
When you are ready to finalize your profile, login at http://www.aucd.org/template/login.cfm using the username and password you selected.
Username: {{username}}
Password: {{password}}.

Users who submit a new profile or update a profile will receive the following email:

Subject Line: Thank you for your AUCD Directory Submission
Body of Email: Your profile has been sent to the directory administrator at your Center for validation. As soon as it is validated, your profile will appear in the Directory and you will receive an email confirmation.

Directory Managers will receive the following email when a new profile is submitted (see note below):

Subject Line: AUCD Directory: Staff profile submitted for your approval
Body of Email: A new or updated staff profile has been submitted for {{username}}. Please log into NIRS and approve or reject the profile as soon as possible.

Directory Managers will receive the following email when an updated profile is submitted:

Subject Line: A staff person has updated their AUCD directory profile
Body of Email: A staff person, Username {{username}}, has updated their AUCD Directory profile. Please log into NIRS and assure that it is accurate.

Users will receive the following email when their profile status is changed to display status:

Subject Line: Your AUCD Directory profile is now live
Body of Email: Your entry has been accepted and is now live. If you wish to change your entry in the future, simply log in and do so.
Your username is: {{username}}
Your password is: {{password}}

Users will receive the following email when selected by the Directory Manager for an update notification:

Subject Line: Please review and update your AUCD Directory Profile
Body of Email: The AUCD Directory is used by members of the AUCD network, federal agencies, and the general public every day. Please take a few moments to review and update your AUCD Directory profile to ensure that it is up to date and accurate.
Login at http://www.aucd.org/template/login.cfm
Username: {automatically provided}
Password: {automatically provided}

Exporting Data

After entering data into NIRS, programs may wish to export (download) their NIRS data into their own local database. You must have Admin access to do this.

To export data:

1. From the Admin pull-down menu on the navigation bar, select Export.
2. Specify the fiscal year to download.
3. The Export Data page contains the following tools for exporting:
    a. Data files in Comma Delimited and Tab Delimited format;
    b. A diagram of how the NIRS data tables are related, which may be reviewed by clicking on it;
    c. A downloadable file containing a complete list of fields and field types in an Excel spreadsheet file, at the top of which is included brief instructions for copying the

information over to Excel.

It may be helpful to review the on-line data dictionary (see the Reviewing the Data Dictionary section), which contains complete descriptions of the major data entry fields.

The back-end NIRS database software is MySQL, which should be compatible with local database software packages (e.g., Access, Oracle).

Importing Data

Overview

The import function allows you to upload a comma- or tab-delimited file from your local database into NIRS. As part of the import process, the system verifies that your file matches the field list of the corresponding NIRS table and all data entry fields required by NIRS are complete.

Instructions

1. To do an import, your local database system needs to be setup to save your data into a format that NIRS can recognize: comma- or tab-delimited. Each database table in NIRS corresponds to a separate delimited file coming from your local database:

Description - Actual NIRS table name

Contacts (all datasets) - tbl_contact

Trainees (Main) - tbl_trainee

Trainees (Years) - tbl_traineeyear

Projects - tbl_projfunding

Activities - tbl_activity

Products - tbl_product

Activity/Product Quantities - tbl_act_prod

The complete list of fields in each of these tables can be found on the NIRS Import page under Table Definitions. The tables are MySQL tables, and more details on the field specifications can be found at http://www.mysql.com/doc/en/Column_types.html.

A few clarifications for preparing import data to fit into these table definitions are:

- Fields listed as "enum(s)" are found in the import data as plain text fields with one text option listed ***exactly*** as it is in this list of fields.
- Fields listed as "set(s)' are found in the import data as plain text fields with multiple options, separated by commas, and listed ***exactly*** as they are in this list of fields.

Note: The way in which "enum(s)' and "set(s)" fields are listed in the NIRS data tables may seem slightly inconsistent at times, due to the way in which they were listed for historical reasons. However, they actually are all listed correctly in the definitions table and should be listed exactly as they are in each case.

- Fields shown on the NIRS entry as checkboxes but listed in field list as "tinyint," should be set up in the import data as 0 = No or Not Checked or 1 = Yes or Checked.
- Any text or memo fields that may contain the delimiter within the field should be enclosed in double-quotes.
  Examples: ,"field,text", "fieldtext"

If you have a text or memo field enclosed in double-quotes and also have double-quotes within the text of the field, then the double-quotes in the field need to be preceded with a backslash to avoid confusion, or use single-quotes instead. The slashes are not saved in your data.

Examples: ,"The "Person-Centered" Approach", ,"The 'Person-Centered' Approach",

- Other examples are shown at the bottom of the NIRS Import page.

2. Once you have your data saved into files ready for importing, check to ensure you have access to the import function. Go to the NIRS Import page, which is an option under "Admin" on the navigation bar. (Note: You must have Admin level of access to NIRS in order to use the import function.) If you have Admin level of access, but do not have access to the import function, please email Natalie Martinez (nmartinez@aucd.org) or Dawn Rudolph (drudolph@aucd.org) or contact the AUCD office at 301-588-8252. Once you have access to the import function, select the corresponding table in the drop-down list, click the Browse button and select one of the import files you have, and click the Import button.

Note that the order in which you import **does matter**. For example, if you have contact records referenced in projects or products, then the contacts should be imported first, followed by the data that link to the contacts. Likewise, since Trainees are stored in 2 related tables, the main trainee table data must be imported first, followed by the related year records.

Note that the import currently only handles importing **new** projects linked to **new** contact records, **new** activities linked to **new** projects, and **new** activities linked to **new** products. If you want to link new records to records already in NIRS (whether those already existing records were entered directly in NIRS or by importing them into NIRS from your local database), these links will need to be defined manually after importing. The one exception is linking from Activities to Projects. If you have existing projects defined with an ID number in the Project Code field, and you reference this number in the Primary or Secondary ID fields in Activities, then the Activity record will automatically link to this project.

The import process does not update any existing NIRS records; for this, you need to go through the NIRS edit forms and edit each manually. You should not attempt to update a record already in NIRS by uploading an updated version from your local database, as that will lead to two separate records on the system (the original and the updated version), not one updated record.

3. Once you click the Import button, the system will upload your file and analyze it for all of the necessary fields and values. At the top of the screen, the Web page updates its progress as it goes, to give you an idea of how far along it is and how much longer it will be processing.

If no problems are found, your data are immediately added to NIRS current reporting period.

If any problems are found, you will receive error messages explaining what the problems are, pointing to the row number in your data so that you may find and correct the data. Some problems that it finds may not be problems at all. For example, for any NIRS field that has a standard list of options and an Other option, if your value is not found in the standard list, it is automatically moved to Other. As this could be a spelling mistake on your part, rather than the intentional entry of a different option, the system warns you that this is happening.

If there are critical problems found, such as required fields not having values, then the system halts the import process. You must correct the problem before trying again. If there problems, but none are critical, then the system will allow you either to cancel the import if you choose to change your data or to proceed with the import. In some cases, you may prefer to go ahead and import the data and correct any mistakes after the import.

Once imported, all records will show up in the standard list of records and can be edited using standard procedures (see User's Guide section, Editing Records). The system automatically sets your login name as the person who added the records, and the current date and time as the date added into NIRS. These fields can be used in the search page's list of miscellaneous fields, in case you need to do a search of the imported records.

Additional Notes:

Marking Records: It is critical that you institute a method for marking records in your local database to avoid inadvertently uploading the same record more than once. To do this, we have added a field to each entry screen that will store local IDs for records. Local IDs **must be** unique across all records **and** across fiscal years. This means that if you numbered your records "1, 2, 3" for FY04, then you must develop unique IDs numbers (i.e., 1A, 1B, 1C) for FY05 or the system may reject your FY05 day or overwrite your FY04 data. A Local ID field has been added to the drop-down menu of searchable fields, and a Local ID from Import field now appears when local IDs are imported into NIRS. Another recommendation for marking records would be for you to include a Date Added field in your local database for each table/dataset and take extra care to ensure that the information entered in that field is accurate. This method for marking records will not work if the same field is used for when the record was added and when it was last updated. When importing a set of records into NIRS, be certain that the date selection for picking records is correct and not overlapping with or leaving a gap between other time periods for which records were previously uploaded. One caveat with this recommended method of marking that may be system-dependent -- if the date added is a date/time field, as often they are, then it is important to consider this when selecting the time period for uploading a set of records. For example, a date of "4/1/10" may assume the beginning of the day as the time; so, selecting records "through 4/1/10" would not include records entered that day, since "4/1/03 11:00:00" is later than "4/1/10 00:00:00." In this case, a more accurate selection would be "everything less than 4/2/10."

Spot-Checking Records: It is important that you spot-check the imported data for errors, prior to importing.

Isolating Importing Errors: To isolate errors resulting from import errors in records already existing in NIRS:

1. Run a data entry error report on the records already on NIRS, using the Data Entry Error Report contained in the drop-down list of standard reports for each dataset.

2. Address all data errors that are listed on the report and temporarily hold off on any further data entry while these errors are being corrected.

3. Conduct the import.

4. Run an error report again to identify any errors that need to be cleaned up in the imported data.

Locating Individual Imported Records: The Search function in NIRS has been enhanced to enable you to find individual records using the ID #s assigned by your local database, even after you have imported the record into NIRS. Go into the Search function. In the list of Other Search fields, there is an item saying Local Activity ID, Local Project ID, Local Product ID, and, for trainees, Local Trainee ID or Local Year ID. Choose this searchable field and define it by typing in the local database ID# of the record you are looking for. These ID fields will also show up on the View screen for records that are in NIRS via importing, although the Local ID field will not appear on the Edit form.

ID Fields: When importing, the ProjectID filed and secondary_projectID field in the Activity table (tbl_activity) are ID numbers for the two affiliated projects, and correspond to either your ID numbers from your local database or codes from the NIRS Project Code field. The AcitivityID field in the tbl_activity refers to the local activity ID, not the NIRS acitivity ID.

Changes to NIRS from one FY to another FY: Modifications to NIRS may be made from one FY to another FY, in order to ensure compliance with Federal reporting requirements as well as respond to suggestions from the network regarding improvements to the system. When this is the case, programs may have to re-engineer their local data before they can upload their data into the new fields/design elements of NIRS.

UCEDD/LEND Trainee Survey

The Relationship Between NIRS and the Survey:

The web-based trainee survey and annual update allow the user to enter data online that is then stored in NIRS. The NIRS trainee dataset interacts with the trainee follow-up survey in several ways:

- As trainees are stored in the NIRS system, a unique login is randomly generated that Centers must provide to their trainees so they may access the surveys.
- This login will link a trainee's follow-up survey to their NIRS record and will provide them with a survey that is pre-populated with their basic information (name, address, etc.).
- Trainees can update their contact information on the surveys; the updates are automatically saved into the trainee main record within NIRS.
- The survey results are available in NIRS for report writing, viewing, and exporting. Exporting allows you to access your trainee follow-up data and store it locally (see the Data Dictionary or User's Guide for instructions on exporting and report writing), and
- Finally, Centers may add site-specific questions to their trainee follow-up survey through NIRS as well. We strongly recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond.

Centers may provide trainees with a paper version of the survey; however the Center will then need to manually enter this data into NIRS.

- For LENDs, this data will transfer to the EHB to populate the former trainee dataset and allows you to run reports for performance measures on former trainees and leadership.
- For UCEDDs, this data will be used to answer the AIDD questions on trainees.

You can access paper versions of the survey from the Paper forms page on AUCD's website or through AUCD central office contact - Corina Miclea or Dawn Rudolph).

What is the Survey?

The Follow Up survey provides leadership outcome data for reporting to AIDD at 1, 5, and 10 years post training and MCHB at 2, 5, and 10 years post training. We have created 5 versions of the follow up survey, ones to be used by (a) UCEDD-only programs, (b) both LEND- only and UCEDD/LEND programs, (c) LEAHs, (d) PPCs, and (e) DBPs. A confidentiality statement is linked to the surveys, along with more detailed definitions of key phrases.

Although the surveys are provided through NIRS, your Center is responsible for conducting your surveys.

Recommended Survey Timeline:

Centers that are LEND-only & Centers that are both UCEDD/LEND:

Because LEND programs must provide provisional reports to MCH in mid-April of every year, we recommend that LENDs:

- Send surveys out to trainees at the end of January with an end of February due date
- Send a follow up request in mid-February

To reduce the burden on Centers, we recommend that Centers that are UCEDD/LEND programs simply follow the LEND timeline.

Centers that are UCEDD only:

Because UCEDDs must provide annual reports to AIDD at the end of each July and trainee surveys must be completed by June 30th, we recommend that UCEDDs:

- Send surveys out to trainees at the end of March with an end of May due date
- Send a follow up request in mid-April

Notifying Trainees About the Follow Up Surveys (done by UCEDDs at 1, 5, & 10 years post training and LENDs at 2, 5, & 10 years post training)**:**

- Use US mail or e-mail to explain the importance of the survey to your Center and request its completion.
- Advise trainees that completing the survey should take a short time (approximately 10 minutes).
- Advise trainees that their responses will be treated confidentially.
- Provide a deadline for responding.
- If you're using the online survey (highly recommended), provide their unique login. Be extremely careful to provide the correct log-in to each trainee to avoid privacy issues and inaccurate survey reporting.
- Provide the URL for the appropriate survey. Indicate how your Center is listed in the drop-down menu of programs. The Survey URLS are:
    - **LEND-only & LEND/UCEDD**: www.aucd.org/nirs/db/survey/lend.cfm
    - **UCEDD-only**: www.aucd.org/nirs/db/survey/ucedd.cfm
- Indicate that after the survey is completed, they may submit their responses by clicking on submit.

If you are using a paper form:

- Provide a stamped self-addressed envelope.

Notes:

1. There is no danger of a trainee using a unique login being able to create multiple surveys for a particular year. If a trainee submits a survey and then uses the unique login to revisit the survey, they will see their most recent responses. If they make changes to the survey and resubmit it, the most recent submission will replace their earlier version in NIRS.
2. NIRS will maintain separate 1, 2, 5, & 10 year surveys in different data years.
3. *The survey no longer provides an option for a generic log-in.* Your trainee **must** be entered into NIRS to have a unique login.
   **Don't forget to supply the trainee's unique login and indicate how your Center is listed in the drop down menu of programs.

Annual Trainee Contact Update (formerly known as Mini Survey) (done annually):

- The **Annual Trainee Contact Update** is used to obtain the most recent contact information on an annual basis. Centers are not required to use the annual update; however we have found that Centers who obtain updated contact information on an annual basis tend to have higher response rates on their follow up surveys.

- This survey should take a maximum of 2-3 minutes.
- The Annual Trainee Contact Update URL is http://www.aucd.org/nirs/db/update
- **Don't forget to supply the trainee's unique login and indicate how your Center is listed in the drop-down menu of programs.

Getting the Information You Need to Send the Surveys:

Trainee Records

The trainee's unique login is displayed at the bottom of page in the trainee main record when you use the View function.

Standard Reports

A standard report in the Trainee dataset called Long Term Survey Info has been created. An Admin level of access is required to view this report. Use this report to generate the lists of trainees that you plan to survey (i.e., those 1, 5, and 10 or 2, 5, and 10 years post-training).

Select the current fiscal year and this report will generate a table with all the information you need to contact former trainees. The report is organized by separation year (i.e., the last fiscal year for which a trainee record exists) and provides contact information and unique login for each trainee. An X will display in the appropriate year column to indicate the surveys completed by the trainee. The table can be pasted into an excel spreadsheet if you choose to do a mail merge or other program to automatically generate letters or e-mails to your former trainees.

Exports

You can also export relevant trainee data with the goal of doing a mail merge or other program to automatically generate letters or e-mails to your former trainees. See the Exporting Data section of the User's Guide.

Adding Site Specific Questions to Your Survey (user defined fields):

You can add one or more questions to your survey using user defined fields. We strongly An Admin level of access is required to add user-defined fields in NIRS. We recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond.

The question(s) you create will be displayed at the bottom of the on-line survey (i.e., below all the standard questions). The user will see the question followed by a text box where they can type their response. The text box will accommodate a fairly large number of characters (letters, spaces, and numbers).

See the User Defined Fields section of the User's Guide for instructions.

Viewing Trainee Surveys:

You can view trainee survey responses through NIRS. An Admin level of access is required to view trainee responses.

1. Select Trainees from the left navigation bar.
2. Select List Survey from the submenu that will appear on the left navigation bar.
3. Select a fiscal year.
4. A list of all submitted trainee surveys from that year's group will be displayed.

A list of all trainees for that year who have not yet submitted a survey will also be displayed. This list may be useful for targeting a follow up request for surveys to trainees.

PPC Survey

The Relationship Between NIRS and the Survey:

The web-based trainee survey and contact update (formerly known as Annual Update/Mini-Survey) allow the user to enter data online that is then stored in NIRS. The NIRS trainee dataset interacts with the trainee follow-up survey in several ways:

- As trainees are stored in the NIRS system, a unique login is randomly generated that programs must provide to their trainees so they may access the surveys.
- This login will link a trainee's follow-up survey to their NIRS record and will provide them with a survey that is pre-populated with their basic information (name, address, etc.).
- Trainees can update their contact information on the surveys; the updates are automatically saved into the trainee main record within NIRS.
- The survey results are available in NIRS for report writing, viewing, and exporting. Exporting allows you to access your trainee follow-up data and store it locally.
- Site-specific questions can be added to the trainee follow-up survey through NIRS. We strongly recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond.

You may provide trainees with a paper version of the survey; however programs will then need to manually enter this data into NIRS. You can access paper versions of the survey on the NIRS Paper Forms page or through AUCD central office: contact Natalie Martinez (nmartinez@aucd.org) or Dawn Rudolph (drudolph@aucd.org), phone number 301-588-8252.

What are the Surveys?

NIRS provides two types of surveys for trainees: the long-term Trainee **Follow Up** survey and a **Medium-Term Survey**:

- The **Follow Up** survey provides leadership outcome data for reporting to MCH for long-term trainees. A confidentiality statement is linked to the surveys.
- The **Medium-Term Survey** is the brief survey that the PPC network developed to answer the PPC specific MCHB performance measure on medium-term trainees.

Although the surveys are provided through NIRS, your program is responsible for conducting your surveys.

Recommended Follow Up Survey Timeline:

Because programs must provide provisional reports to MCH in mid-April of every year, and trainee surveys must be completed by June 30th, to allow ample time for processing and follow-ups, we recommend that programs:

- Send follow up surveys out to trainees at the end of January with an end of February due date
- Send a follow up request in mid-February

Notifying Former Long-Term Trainees About the Follow Up Survey (done at 2, 5, & 10 years post training):

- Use US mail or e-mail to explain the importance of the survey to your program and request its completion. Advise trainees that completing the survey should take a short time (approximately 15 minutes).
- Advise trainees that their responses will be treated confidentially.
- Provide a deadline for responding.

If you're using the **online survey (highly recommended):**

- Provide their unique login. - Be **extremely careful** to provide the correct log-in to each trainee to avoid privacy issues and inaccurate survey reporting. Provide the URL for the survey. The Long-Term Trainee Survey URL is www.aucd.org/nirs/db/survey/ppc_long.cfm
- Indicate how your program is listed in the drop-down menu of programs.
- Indicate that after the survey is completed, they may submit their responses by clicking on submit.

If you are using a **paper form:**

- Provide a stamped self-addressed envelope.

Notes:

1. There is no danger of a trainee using a unique login being able to create multiple surveys for a **particular year**. If a trainee submits a survey and then uses the unique login to revisit the survey, they will see their most recent responses. If they make changes to the survey and resubmit it, the most recent submission will replace their earlier version in NIRS.

2. NIRS will maintain separate 2, 5, & 10 year surveys in different data years.

**Don't forget to supply the trainee's unique login and indicate how your program is listed in the drop-down menu of programs.

Medium-Term Survey (done annually; sent only to those trainees who have just completed their training that year)

- This survey should take a maximum of 2-3 minutes
- The Medium-Term survey URL is www.aucd.org/nirs/db/survey/ppc_med.cfm

Note: You will get the best results from this survey if you provide each trainee with any of the following information that you think they will not readily know: Training Start and End Dates (mm/yyyy); whether they received a stipend; Degree pursued; Discipline.

Annual Trainee Contact Update (formerly known as Mini Survey) (done annually)

- The **Annual Update** is used to obtain the most recent contact information on an annual basis. You are not required to use the annual update; however we have found that those who obtain updated contact information on an annual basis tend to have higher response rates on their follow up surveys.
- Completing it should take a maximum of 2-3 minutes.
- The Annual Trainee Contact Update URL is http://www.aucd.org/nirs/db/update
- **Don't forget to supply the trainee's unique login and indicate how your program is listed in the drop-down menu of programs.

Getting Information You Need to Send out the Survey:

Standard Reports

A standard report in the Trainee dataset called -Long Term Survey Info Report was created to generate the lists of trainees that you plan to survey (i.e., 2, 5, and 10 years post-training). An Admin level of access is required to view this report. To access this report:

1. From the top navigation bar, access the trainee dataset
2. Select Reports from the submenu that will appear on the navigation bar
3. Click on Long Term Survey Info Report
4. Select the **current** fiscal year

This report will generate a table with all the information you need to contact former trainees. The report is organized by *separation year* (i.e., the last fiscal year for which a trainee record exists) and provides contact information and unique login for each trainee. An X will display in the appropriate year column to indicate the surveys completed by the trainee.

The table can be pasted into an excel spreadsheet if you choose to do a mail merge or other program to automatically generate letters or e-mails to your former trainees.

Use the standard report "PPC Medium Term Trainee Survey Info" to generate the list of former medium-term trainees that you plan to survey. An Admin level of access is required to view this report.

To access this report:

1. From the top nav bar, access the trainee dataset
2. Select "Reports" from the submenu that will appear on the nav bar
3. Select "PPC Medium Term Trainee Survey Info" from the LEND, LEAH, PPC, DBP column
4. Select the **current** fiscal year

This report will generate a table with all the information you need to contact former trainees. The report provides contact information and unique login for each trainee. An "X" will display in the Survey Completed column to indicate that the trainee completed the survey. The table can be pasted into an excel spreadsheet if you choose to do a mail merge or other program to automatically generate letters or e-mails to your former trainees. **Exports**

You can also export relevant trainee data with the goal of doing a mail merge or other program to automatically generate letters or e-mails to your former trainees. An Admin level of access is required to export data.

See the Exporting Data section of the User's Guide.

Viewing Trainee Surveys

You can view trainee surveys as soon as they are submitted. An Admin level of access is required view surveys.

1. From the top navigation bar, access the Trainee dataset
2. Select List Survey from the submenu that will appear on the navigation bar
3. Select a fiscal year.
4. A list of all submitted trainee surveys from that year's group will be displayed. You can view the surveys individually by clicking on the trainee name.
5. A list of all trainees for that year who have not yet submitted a survey will also be displayed. This list may be useful for targeting a follow up request for surveys to trainees.

Adding Site-Specific Questions to Your Survey (user defined fields):

You can add one or more questions to your survey using user defined fields. We strongly recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond. An Admin level of access is required to add user-defined fields in NIRS.

The question(s) you create will be displayed at the bottom of the on-line survey (i.e., below all the standard questions). The user will see the question followed by a text box where they can type their response. The text box will accommodate a fairly large number of characters (letters, spaces, and numbers).

See the User Defined Fields section of the User's Guide.

LEAH **Survey**

The Relationship Between NIRS and the Survey:

For LEAH programs whose trainees are accessing the web-based survey online, this online trainee surveys allow the user to enter data that is then stored in NIRS.

The NIRS trainee dataset interacts with the trainee follow-up survey in several ways:

- As trainees are stored in the NIRS system, a unique login is randomly generated that programs must provide to their trainees so they may access the surveys.
- This login will link a trainee's follow-up survey to their NIRS record and will provide them with a survey that is pre-populated with their basic information (name, address, etc.).
- Trainees can update their contact information on the surveys; the updates are automatically saved into the trainee main record within NIRS.
- The survey results are available in NIRS for report writing, viewing, and exporting. Exporting allows you to access your trainee follow-up data and store it locally (see the Data Dictionary and User's Guide for instructions on exporting and report writing).
- Finally, you may add site-specific questions to their trainee follow-up survey through NIRS as well. We **strongly** recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond.

You may provide trainees with a paper version of the survey; however programs will then need to manually enter this data into NIRS. You can access paper versions of the survey on the NIRS Paper Forms page or through AUCD central office contact Natalie Martinez (nmartinez@aucd.org) or Dawn Rudolph (drudolph@aucd.org), phone number 301-588-8252.

If you continue to elect to use NIRS only for the long-term survey and plan to do your own data entry of surveys submitted, simply provide your trainees with a copy of the paper survey and ask them to return it to you. At that time, you can input their survey as well as any other relevant data from the program.

What is the Survey?

- The **Follow Up** survey provides leadership outcome data for reporting to MCH. A confidentiality statement is linked to the surveys.

Although the surveys are provided through NIRS, your program is responsible for conducting your surveys.

Recommended Follow Up Survey Timeline

Because programs must provide provisional reports to MCH in mid-April of every year, and trainee surveys must be completed by June 30th, to allow ample time for processing and follow-ups, we recommend that programs:

- Send follow up surveys out to trainees at the end of January with an end of February due date
- Send a follow up request in mid-February

Notifying Trainees About the Follow Up Survey (done at 2, 5, & 10 years post training):

- Use US mail or e-mail to explain the importance of the survey to your program and request its completion.
- Advise trainees that completing the survey should take a short time (approximately 15 minutes).
- Advise trainees that their responses will be treated confidentially.
- Provide a deadline for responding.

If you are using a **paper form:**

- Provide a stamped self-addressed envelope.

If you're using the **online survey (highly recommended):**

- Provide their unique login. Be **extremely careful** to provide the correct log-in to each trainee to avoid privacy issues and inaccurate survey reporting.
- Provide the URL for the survey. The Survey URL is www.aucd.org/nirs/db/survey/leah.cfm
- Indicate how your program is listed in the drop-down menu of programs.
- Indicate that after the survey is completed, they may submit their responses by clicking on submit.

Notes:

1. There is no danger of a trainee using a unique login being able to create multiple surveys for a **particular year**. If a trainee submits a survey and then uses the unique login to revisit the survey, they will see their most recent responses. If they make changes to the survey and resubmit it, the most recent submission will replace their earlier version in NIRS.
2. NIRS will maintain separate 2, 5, & 10 year surveys in different data years.

ANNUAL TRAINEE CONTACT UPDATE (formerly known as Mini Survey) (done annually)

- The **Annual Update** is used to obtain the most recent contact information on an annual basis. You are not required to use the annual update; however we have found that those who obtain updated contact information on an annual basis tend to have higher response rates on their follow up surveys. Completing it should take a maximum of 2-3 minutes.
- The Annual Trainee Contact Update URL is http://www.aucd.org/nirs/db/update
- Supply the trainee's unique login and indicate how your program is listed in the drop-down menu of programs.

Getting Information You Need to Send out the Surveys:

Trainee Records

The trainee's unique login is displayed at the bottom of page in the trainee main record when you use the View function.

To access the unique login for one trainee:

1. 1. From the navigation bar, access the trainee dataset
2. 2. Select View trainees

a. You will see two record sets for each trainee

b. Select View for the first set (the trainee main record), which will have the trainee name listed

c. The trainee survey login is displayed at the bottom of the page.

Standard Reports

A new standard report in the Trainee dataset called Long Tem Survey Info has been created. An Admin level of access is required to view this report. Use this report to generate the lists of trainees that you plan to survey (i.e., 2, 5, and 10 years post-training).

To access this report:

1. From the top navigation bar, access the trainee dataset
2. Select Reports from the submenu that will appear on the navigation bar
3. Select Long Term Survey Info
4. Select the **current** fiscal year

This report will generate a table with all the information you need to contact former trainees. The report is organized by *separation year* (i.e., the last fiscal year for which a trainee record exists) and provides contact information and unique login for each trainee. An X will display in the appropriate year column to indicate the surveys completed by the trainee.

The table can be pasted into an excel spreadsheet if you choose to do a mail merge or other program to automatically generate letters or e-mails to your former trainees.

Exports

You can also export relevant trainee data with the goal of doing a mail merge or other program to automatically generate letters or e-mails to your former trainees. An Admin level of access is required to export data.

See the Exporting Data section of the User's Guide.

Viewing Trainee Surveys

You can view trainee surveys as soon as they are submitted. An Admin level of access is required view surveys.

1. From the top navigation bar, access the trainee dataset

2. Select List Survey from the submenu that will appear on the navigation bar

3. Select a fiscal year.

4. A list of all submitted trainee surveys from that year's group will be displayed. You can view the surveys individually by clicking on the trainee name.

5. A list of all trainees for that year who have not yet submitted a survey will also be displayed. This list may be useful for targeting a follow up request for surveys to trainees.

Adding Site-Specific Questions to Your Survey (user defined fields):

You can add one or more questions to your survey using user defined fields. We **strongly** recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond. An Admin level of access is required to add user-defined fields in NIRS.

The question(s) you create will be displayed at the bottom of the on-line survey (i.e., below all the standard questions). The user will see the question followed by a text box where they can type their response. The text box will accommodate a fairly large number of characters (letters, spaces, and numbers).

See the User Defined Fields section of the User's Guide.

The Relationship Between NIRS And The Survey

The web-based trainee survey and contact update (formerly known as Annual Update/Mini-Survey) allow the user to enter data online that is then stored in NIRS. The NIRS trainee dataset interacts with the trainee follow-up survey in several ways:

- As trainees are stored in the NIRS system, a unique login is randomly generated that programs must provide to their trainees so they may access the surveys.
- This login will link a trainee's follow-up survey to their NIRS record and will provide them with a survey that is pre-populated with their basic information (name, address, etc.).
- Trainees can update their contact information on the surveys; the updates are automatically saved into the trainee main record within NIRS.
- The survey results are available in NIRS for report writing, viewing, and exporting. Exporting allows you to access your trainee follow-up data and store it locally (see the Data Dictionary and User's Guide for instructions on exporting and report writing).
- Finally, you may add site-specific questions to their trainee follow-up survey through NIRS as well. We *strongly* recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond.

Centers may provide trainees with a paper version of the survey; however the Center will then need to manually enter this data into NIRS, which will be transferred to the EHB to populate the former trainee dataset. The survey data also allows Centers to run reports for performance measures on former trainees and leadership.

You can access paper versions of the survey from the NIRS Paper forms page or through AUCD central office (contact Natalie Martinez at nmartinez@aucd.org or Dawn Rudolph drudolph@aucd.org).

What Is the Survey?

- The **Follow Up** survey provides leadership outcome data for reporting to MCH. A confidentiality statement is linked to the surveys.

Although the survey is provided through NIRS, your program is responsible for conducting your surveys.

Recommended Follow Up Survey Timeline

Because programs must provide provisional reports to MCH in mid-April of every year, and trainee surveys must be completed by June 30th, to allow ample time for processing and follow-ups, we recommend that programs:

- Send follow up surveys out to trainees at the end of January with an end of February due date
- Send a follow up request in mid-February

Notifying Trainees About the Follow Up Surveys (done at 2, 5, & 10 years post training)

- Use US mail or e-mail to explain the importance of the survey to your program and request its completion.
- Advise trainees that completing the survey should take a short time (approximately 15 minutes).
- Advise trainees that their responses will be treated confidentially.
- Provide a deadline for responding.
    - If you are using a **paper form**: Provide a stamped self-addressed envelope.
- If you're using the **online survey (highly recommended)**:
- Provide their unique login. Be *extremely careful* to provide the correct log-in to each trainee to avoid privacy issues and inaccurate survey reporting.
- Provide the URL for the survey. The Survey URL is www.aucd.org/nirs/db/survey/dbp.cfm
- Indicate how your program is listed in the drop-down menu of programs.
- Indicate that after the survey is completed, they may submit their responses by clicking on submit.

Notes:

1. There is no danger of a trainee using a unique login being able to create multiple surveys for a particular year. If a trainee submits a survey and then uses the unique login to revisit the survey, they will see their most recent responses. If they make changes to the survey and resubmit it, the most recent submission will replace their earlier version in NIRS.
2. NIRS will maintain separate 2, 5, & 10 year surveys in different data years.

Annual Trainee Contact Update (formerly known as Mini Survey) (done annually)

- The **Annual Update** is used to obtain the most recent contact information on an annual basis. You are not required to use the annual update; however we have found that those who obtain updated contact information on an annual basis tend to have higher response rates on their follow up surveys.
- Completing it should take a maximum of 2-3 minutes.
- The Annual Trainee Contact Update URL is http://www.aucd.org/nirs/db/update

Getting Information You Need to Send Out the Surveys

- Log in onto NIRS Go to https://www.aucd.org/nirs/db/index2.cfm
- At the first field - Center Name - use the right downward arrow to scroll down and click on your program's name
- Enter your login and password (which have to be set up by whomever has administrative control of NIRS at your site, probably your Data Coordinator)
- Hit the Submit button.

Navigate the NIRS Site

More information on NIRS is available on the NIRS Resource Page. The Data Dictionary and User's Guide can also be accessed in NIRS.

1. The first page you will come to after you log in is the welcome page, which should have your program's name across the top right corner and the message Welcome to the NIRS Database across the middle of the page

a. At the center of the welcome page, you will see the Trainee Dataset listed.

2. Under the trainee dataset, there are links to each of the functions you can perform:

a. Add - entering data into a new record

b. Search - looking for information within existing records by specific criteria

c. List/Edit - listing and editing existing records

d. Reports - compiling information by specific fields

e. Data Dictionary - general information on the dataset and specific information on each field in the dataset

3. On the top of the page, you will see a navigation bar that also allows you to perform each of the above-listed functions the dataset

4. You can go back and forth between these pages freely, unless you are entering data

Trainee Records

The trainee's unique login is displayed at the bottom of page in the trainee main record when you use the View function.

To access the unique login for one trainee:

1. From the navigation bar, access the trainee dataset
2. Select View trainees

a) You will see two record sets for each trainee

b) Select View for the first set (the trainee main record), which will have the trainee name listed

c) The trainee survey login is displayed at the bottom of the page.

Standard Reports

Use the standard report Long Term Survey Info to generate the lists of trainees that you plan to survey (i.e., 2, 5, and 10 years post-training). An Admin level of access is required to view this report.

To access this report:

1. From the top navigation bar, access the trainee dataset
2. Select Reports from the submenu that will appear on the navigation bar
3. Select Long Term Survey Info
4. Select the **current** fiscal year

This report will generate a table with all the information you need to contact former trainees. The report is organized by *separation year* (i.e., the last fiscal year for which a trainee record exists) and provides contact information and unique login for each trainee. An X will display in the appropriate year column to indicate the surveys completed by the trainee.

FY 2013: Long Term Survey Info

FY 2013: Long Term Survey Info													
---AAA-Test Center, DBP													
08/07/2012 08:55 PM													
TERMINAL YEAR^	**TYPE**	**NAME**	**ADDRESS**	**CITY**	**STATE**	**ZIP**	**PHONE**	**EMAIL**	**2ND EMAIL**	**SURVEY LOGIN**	**1 YEAR OUT SURVEY COMPLETED (COMPLETED FY13)**	**5 YEAR OUT SURVEY COMPLETED (COMPLETED FY13)**	**10 YEAR OUT SURVEY COMPLETED (COMPLETED FY13)**
2008	L	Joe Bow	fdgda	aewfasd	MD United States	20902				xaa40957947			
2012	L,I	c m	a	c	CO	22222				xte49851172			
2012	L,L,L,L	suzy is simple	1234 simple street	place	ME Albania	02098	011+			xaa47250589			

This sample table is for FY2013: see that FY2013 is displayed in the header. The columns at the far left indicate the completed surveys for current fiscal year minus 1, 5, and 10 years (i.e., 2013-1=2012; 2013-5=2008; and 2013-10=2003).

The table can be pasted into an excel spreadsheet if you choose to do a mail merge or other program to automatically generate letters or e-mails to your former trainees. Exports

You can also export relevant trainee data with the goal of doing a mail merge or other program to automatically generate letters or e-mails to your former trainees. An Admin level of access is required to export data.

1. From the top navigation bar, access the Admin features.
2. Select the Export option from the submenu that will appear on the navigation bar.
3. Select which datasets you would like to export to your local system.

- Trainees will give you the portion of the record that has their general contact information and their trainee login.
- Trainee year will give you fiscal year information (contact hours, etc.).
- Trainee survey is the option you will use to export all your long-term follow-up survey information, once former trainees have submitted them.

4. Export to your local system.

Viewing Trainee Surveys

You can view trainee surveys as soon as they are submitted. An Admin level of access is required view surveys.

1. From the top navigation bar, access the trainee dataset
2. Select List Survey from the submenu that will appear on the navigation bar
3. Select a fiscal year.
4. A list of all submitted trainee surveys from that year's group will be displayed. You can view the surveys individually by clicking on the trainee name.
5. A list of all trainees for that year who have not yet submitted a survey will also be displayed. *This list may be useful for targeting a follow up request for surveys to trainees.*

ADDING SITE-SPECIFIC QUESTIONS INTO YOUR SURVEY (user defined fields)

You can add one or more questions to your survey using user defined fields. We strongly recommend keeping these to a minimum, as the longer the survey becomes the less likely your trainees are to respond. An Admin level of access is required to add user-defined fields in NIRS.

The question(s) you create will be displayed at the bottom of the on-line survey (i.e., below all the standard questions). The user will see the question followed by a text box where they can type their response. The text box will accommodate a fairly large number of characters (letters, spaces, and numbers).

1. From the top navigation bar, access the Admin features.
2. Select the Misc Field option.
3. Click on Edit beside the survey field, type in a question, and click Save. The next time you access the entry form for that dataset, you will see the fields(s) you defined with the question(s) you provided.
4. To change the question on a user-defined field, follow steps 1-3.

To remove a user-defined field, follow steps 1 and 2, but instead of typing in a new question, erase the current question leaving the text box blank and click Save.

Logging Out

The system will automatically time out after one hour of inactivity. If you want to end your session on NIRS and do not wish to leave the system open until it automatically times out, you can manually log out.

NIRS has been configured to automatically reconnect users if the session times out inactivity. Users may opt to disable this feature upon logging in. Manually logging out is strongly recommended for security purposes and is done as follows:

1. Click on Logout on the top of the navigation bar on the left of the page.
2. This will take you back to the Login page.
3. To logout completely, please close your browser window.