

NIRS Data Coordinators Meeting

Sunday, November 6, 12:30pm – 4:30pm

Agenda and Discussion Summary

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Test Center account

All Programs can use the Test Center in NIRS to test certain functions in NIRS, train other staff on how to use NIRS, etc. Generic accounts have been created for all Test Centers – to access the Test Center, go to the login url as usual:

UCEDDs and LENDs: <https://www.aucd.org/nirs/db/index.cfm>

LEAHs, PPCs and DBPs: <https://www.aucd.org/nirs/db/index2.cfm>

- Center name: select the appropriate Test Center from the drop-down menu (at the top of the list)
- Login: nirstest
- Password: nirstest

Individualized accounts for the Test Center can also be created at any time – these can be useful to track somebody's work, instead of all records created under the generic account. Just send us an email and we will be happy to create an account for you.

Overview of changes implemented this year (2011)

This was a brief overview of all the changes implemented this year: the major changes implemented in June 2011 to meet the latest MCHB reporting requirements and the changes implemented in August 2011, with the iteration of FY 2012 datasets. The latter changes included Trainee survey updates (will go into more details about this later) as well as changes suggested by Data Coordinators throughout the year.

Reporting requirements

This was an overview of reporting requirements. There are no changes from what is known already; the purpose of this topic was to provide a reminder summary and allow attendees to ask questions if needed.

UCEDDs

The Annual Report will stay the same for FY 2012. It will be due on July 30, 2012, as each year, and the [Annual Report Guidebook](#) is available on the [NIRS Resources page](#).

Based on the new ADD reporting requirements, major changes will be implemented for the FY 2013 Annual Report, but the Workgroup is still working on defining how these new measures will be implemented for data collection and reporting purposes. These changes will not affect the FY 2012 Annual Report.

Many UCEDD Programs will be submitting their 5-year report in 2012 (due on September 29, 2012). There is another Workgroup that is currently working on the format of the final report. When we have more information about this, we will definitely let everyone know.

MCHB Training Programs

The [MCHB-LEND Reporting Guidance](#) is now posted on the [NIRS Resources](#) page.

We wanted to thank everyone once again for your understanding and patience as we implemented the new MCHB reporting requirements. We also want to reassure you that we will work with MCHB to fix all the glitches that Programs ran into this year. However, no incomplete records will be accepted in the future, so you will need to make sure to have complete records in NIRS (meaning that all required fields are completed).

The data export will take place only once a year moving forward, in late summer/early fall, after the end of the fiscal year. This is the known timeline, but exact dates will be decided and announced at a later date. For all MCH-funded Programs, the data export will include:

- Trainees dataset → Long Term Trainee Information form and demographic information for Former Trainee Information form
- Survey data → Former Trainee Information form
- Products dataset → Products and Publications form
- Directory dataset → Faculty and Staff Information form

There are several Standard Reports in NIRS that can help with completing the Performance Measures in the EHB. AUCD will work on developing a resource that will describe all these reports, as well as clarify some differences in the data collection measure between NIRS and the EHB.

For **all Programs**, here a few important **deadline reminders**:

- All data for the current fiscal year should be entered in NIRS by June 30th.
- Data cleaning can continue through the month of July, before the submission of the UCEDD Annual Report and the new fiscal year iteration.
- Trainee surveys must be entered in NIRS by June 30th. Because there is no fiscal year field for surveys, the submission date is the one used to select the survey for one fiscal year or another (for reports, data export, etc.). If the submission date is in July, then NIRS will interpret the survey as belonging to the fiscal year starting on July 1st. This is why it is essential that all surveys be entered by June 30th.

Discussion of important items to know

Trainees dataset

- Correctly mark trainees as LEND and/or UCEDD. To accurately report your trainees to the federal funder (ADD and/or MCHB), it is essential to mark trainees correctly, otherwise they will not be reported on. Feedback was received to clarify that the definition in the question “*Is this a UCEDD Preservice Prep or Continuing Education Trainee?” refers to all UCEDD trainees, because it may be confusing and mislead Data Coordinators to think that this does not apply to all UCEDD trainees. This is something that will be done for the next iteration of NIRS, FY 2013.
- Data entered in the fiscal year record should be for the respective fiscal year only, not for the entire duration of the training program. A year record should be created for each fiscal year that the trainee is in the program.

- Trainee surveys – several changes have been implemented, with many questions now required; there is no way for the trainee to submit the survey without completing all the required questions. These changes have been made to meet the reporting requirements of both ADD and MCHB.
 - A question has been added to the survey after the demographic information: “Have you completed UCEDD/LEND training program?”, with possible answers “Yes” and “No.” The purpose of this question is to prevent the completion of the survey by trainees who have not completed the training program.
- Trainee survey report with tips on improving response rate – this resource was shared as a handout at the meeting, and it is also available on the [NIRS Resources](#) page ([Increasing Trainee Survey Responses](#)) as well as on the NIRS login page. This report was developed by Hillary Spears, Project Specialist at AUCD and Rebecca Carman, Senior Project Specialist at AUCD, based on interviews they conducted with Centers that have high response rates.
- Feedback was received to address with MCHB the guidance on full or partial LEND trainees, and also that some trainees do not participate in the full training program, so it would be best not to make them take the survey.

Projects dataset

This information is particularly important for **UCEDD Programs**: for the purpose of correctly reporting the Funds Leveraged in the UCEDD Annual Report, it is essential that the core grant funding be entered in the Projects dataset. The FY 2012 core funding amount is \$535,000.

There are two ways to do this:

- either by entering the entire core grant funding in one Project record
- or by splitting it between multiple Project records.

To verify if the core funding has been entered, a search can be run in NIRS, with the following criteria:

The screenshot shows the NIRS interface for the 'Projects' dataset. The 'Project Search' section is active, displaying search criteria. The 'Fiscal Year' is set to 2012. The search criteria table is as follows:

When...	Is...	The Following...
PROJECT FS ADD (N)	not blank.	
	equal to	
	equal to	
	equal to	

At the bottom of the search section are 'Search' and 'Clear' buttons. A 'Need HELP?' button is also present between the 'Is...' and 'The Following...' columns.

The above search will return all Project records that contain ADD funding. It will be up to you to recognize if the core grant funding has been entered in one or more of the records or not.

If you know that your Program enters the entire core grant funding in one record, then the search below will be more helpful:

The screenshot shows the NIRS (National Information and Reporting System) interface for the FY 2012. The 'Projects' tab is selected in the navigation bar. The 'Project Search' section is active, displaying a search form. Three blue arrows point to the 'Fiscal Year' (2012), 'Keywords', and 'Other Search' fields. Below the search fields, there is a table with four columns: 'When...', 'Is...', 'Need HELP?', and 'The following...'. The first row of the table shows 'PROJECT FS ADD (N)' in the 'When...' column, 'equal to' in the 'Is...' column, and '535000' in the 'The following...' column. There are 'Search' and 'Clear' buttons at the bottom of the search section.

A question was raised about how best to reflect state or other funding that is not tied to a specific project, such as set-aside funding from the state. It is suggested that a Project record be added for that funding, so it is captured and can be counted toward leveraged funds.

Activities dataset

Selecting the core function:

- Training Trainees vs. Community Training: Training Trainees is to be selected only for trainees enrolled in your training program. Any other training activities should go under community training (core function of Performing Technical Assistance and/or Training).
- Selecting one core function even if an activity meets several core functions: This is a common question and the purpose of the activity is what should drive the choice, and for the most part there should be only one entry per activity, reflective of the activity itself. For instance, an activity may seem to fit under both Training and Information Dissemination. If the main purpose of the activity is training, then giving away some flyers/handouts as part of the activity is not a separate dissemination activity. Still, if you think that important Product(s) were disseminated through that activity and would like to capture that, an option would be to create an Information Dissemination activity to link as many disseminated products as possible. There is no limit as to how many Products can be linked to an Activity record, nor does it matter that the Products all be disseminated at the same time. So Products disseminated through various channels and at different times can be linked to the same Activity. That is because the number of Products disseminated is what matters for reporting purposes, not the number of Activity records. Definitely, it should not be common practice to create two records for one activity.
 - Questions came up here about the number of Products disseminated and counting websites as Products. Indeed, getting the dissemination figure is sometimes challenging, and there is no better guidance that we have other than what is in the Data Dictionary already. It is important though to try to enter a fairly approximate number of how many people the Product was disseminated to. For instance, in the case of a radio show, if the radio station has on average 4 million listeners, that does not mean the radio show entered in NIRS was disseminated to 4 million people. Rather, figures specific to the radio show should be estimated.
 - Counting websites as Products: Websites are not to be entered as Products unless they are developed as a standalone resource in their entirety. Additionally, for UCEDDs, they must be

part of the grant project. Otherwise, websites are just means of information dissemination and should not be entered as Products. For Products posted on a website though, download counters can be set up, and the figures can be used for number disseminated.

- If you are unsure as to whether something posted on the website can be entered in NIRS, please check the table of Product types and their definitions, to see if your posting fits in any of the categories. There is the “Other” category as well, but that should be used by MCHB Programs only, and there is a limit of 3 Products with type “Other” per Program. So that is not to be used for just any Product that does not fit in any other category.
- Continuing Education and TA activities in NIRS and the EHB – there seem to be some differences in capturing data on Continuing Education between NIRS and the EHB. Better language and guidance are needed to explain what Continuing Education refers to. AUCD will develop a resource for MCHB Programs to compare and guide data entry in the two systems. One aspect that was discussed here was the question on Continuing Credits offered. While NIRS allows users to select that no continuing education credits were offered for a Training activity, it seems that is not possible in the EHB. The conclusion of the discussion was to select Yes (Continuing Education credits are offered) only when some sort of certification is offered.

Products dataset

- The discussion on dissemination figures took place previously, when talking about the Activities dataset.
- A friendly reminder that completing all required fields is essential; for MCHB Programs, major changes were implemented last June to accommodate MCHB’s latest reporting requirements, and even though this past fall we were able to export incomplete records to the EHB, we will not be allowed to do the same next year. So it is extremely important to make sure that your records are complete, otherwise they will be eliminated from the data export files.
- For MCHB Programs, in the past there were issues with duplicate records in the EHB. That stemmed mainly from the fact that Centers needed to bring old records into the current fiscal year for the purpose of linking them to Information Dissemination Activities. But that led to duplicate records in the EHB, so we introduced a new field, which is in every Product form: “Include(d) in DGIS export for...”. This is now the field that is used to select the correct records to be exported from NIRS to the EHB. Below is a screenshot of this field. Please make sure to select the correct fiscal year in which a record should be/was exported. For new records, select the current fiscal year. For records created using the “Save As” function, select the year that the record was first entered in NIRS, so that the same Product is not exported twice to the EHB.

*Include(d) into DGIS/EHB export for FY2012 (July 1, 2011 - June 30, 2012)
current FY for new product selected by default; select FY in the past if you are recreating the product for dissemination purposes

- Conference presentations – Activities or Products: there is sometimes confusion on how to report Conference presentations, as either Activities or Products. Conference presentations seem to fit in both categories, but the decision should be made based on the Program type and its reporting requirements.
 - For UCEDDs, it is best to enter Conference presentations as Activities, and capture this way all the information about the audience.
 - For MCHB Programs (LENDs, LEAHs, PPCs and DBPs), it is more helpful to enter Conference presentations as Products, which will be uploaded to the EHB. However, please check the definition for Conference presentations in the Data Dictionary, because not all presentations fit here.
 - For UCEDD/LEND Programs, the solution to meet the reporting requirements of both Programs is the following: create an Activity record with Program type = UCEDD and a separate Product record with Program type = LEND, but do not link it to an Information

Dissemination Activity. This way, the Activity record will be counted in the UCEDD Annual Report, and the Product record will be included in the data export to the EHB, but there will be no double counting for a Conference presentation as both Activity and Product for either of the Programs.

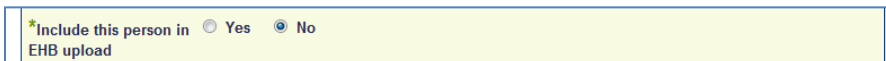
- It was suggested to bring back the functionality that allows the user to change the Product type without having to delete the record with the incorrect type and re-enter the Product under the correct type.

Goals dataset

- If no Goals are listed in the UCEDD Annual Report, then it means that no Goal records have been created for the current fiscal year. Go to the Goals dataset and add the Goals for the current year, or using the Save As function, bring Goals from previous years into the current fiscal year. Also, it is important to number Objectives (any numbering if choice), otherwise they will not be listed in the Annual Report.

Directory dataset

- A couple important changes were made last June and they are essential for MCHB reporting purposes. Primary Discipline is a new field, which has been added to match the field with the same name in the EHB. It is a required field, so a profile cannot be saved without making a Primary Discipline selection. Even though the Discipline field used to be in the Directory records already, this field is multiple-choice, and it was decided that it is best to keep it this way and add the separate Primary Discipline field (single-choice) to serve MCH reporting purposes. While this new field is included in the data export to the EHB, the Discipline field is the one that populates the online profiles. The Primary Discipline and Discipline fields are not complementary to each other, so the selection made for Primary Discipline should be checked in the Disciplines list as well, so that it is listed in the online profile.
- A question was raised about what to select for non-permanent employees or those who do not have a Primary Discipline. Because Primary Discipline is a required field and a selection must be made, the “Other” choice can be used in this case.
- It was mentioned that it might be good to be able to select multiple disciplines for Trainees as well, so it was suggested to change the Trainee form to have a Primary Discipline field and a separate multiple-choice Discipline field.
- Another important field is “Include this person in EHB upload” – based on the selection made here, a profile will or will not be include in the data export to the EHB. It is up to the Centers’ discretion to decide which profiles to be included in the data export.



*Include this person in EHB upload ☐ Yes ☒ No

- Moving forward, the Directory dataset will be included in the data export for all MCH Programs, and the data from this dataset will populate the Faculty & Staff form in the EHB. This is particularly useful because the Directory dataset is not tied to a fiscal year, so records need to be entered only once and then updated as necessary. It might be helpful to communicate to staff members that their profiles will be included in the data export, so it is important for them to update their profiles.
- As a friendly reminder, the online directory is built around positions, not names, so someone can be listed multiple times in different sections of a Center's directory. This will happen when several positions have been checked for the same person; a separate entry for each person should not be created for each position they hold. Profiles can be updated via NIRS by users with Admin access level or via the website by each person. The url to update profiles online: <https://www.aucd.org/template/login.cfm> Faculty and staff members who do not have an online profile can use the same link to register and

create their online profile. Once a new profile has been created or updated, an Admin user will need to approve the updates.

- Adding the Center's public Annual Report (i.e., Executive Summary highlighting the accomplishments throughout the year, not the UCEDD Annual Report to ADD) to the Center's online Directory: this can be a very helpful marketing tool to promote your Center's activities. Below are the steps to upload the report to the online Directory:
 - Go to Directory → Dashboard
 - Under Manage Center Information, click on Edit to the left of the Program for which the document is to be added
 - Scroll down to the Brochure field and click on Choose File
 - Select the appropriate from your computer and click Open
 - Enter a Brochure Title and click on Save

The steps above will add the document to your Center's address block in the online Directory. The same steps can be followed to add a logo, but the Upload Logo field needs to be used instead of the Brochure one.

- The AUCD Multi Cultural Council (MCC) collects a diversity survey to understand our network's diversity. AUCD runs a NIRS report and sends it to MCC for analysis on an annual basis (only aggregate data is provided). For this purpose, it is very important that Directory profiles be updated. It was concluded it would be best that AUCD send a reminder about updating staff profiles in July, when everyone is using NIRS heavily already, and then the report will be run and sent to MCC in early fall, after the new fiscal year iteration.

Custom Reports

- Custom reports are a very useful tool, even though somewhat technical. The results are provided in a table that can be easily copied into Excel for further editing and formatting. Also, the number of criteria that can be used is bigger than for searches, which will allow 4 criteria at a time. A sample custom report was created to show how the Custom Report function works.
- Also, another helpful tool is the ability to run reports for multiple years. When running a report, to the right of the Fiscal Year drop-down menu, there is a yellow button with a plus "+" sign on it. This can be used to select multiple years to run a report. Select each year needed from the drop-down menu and then click on the yellow button – this will add the respective year in a list under the drop-down menu. There is no need to add the last year needed – leaving it selected in the Fiscal Year drop-down menu will suffice. Below is an example of selections made to run a report for FY 2008-2012 (inclusive of all years). This functionality is particularly useful at the end of the grant period, when results for multiple years must be reported.

The screenshot shows the AUCD NIRS system interface. At the top, there is a header with the AUCD logo and the text "{AUCD Central Office} Central Office". Below this, it says "---AAA-Test Center, UCEDD/LEND" and "FY 2012 National Information and Reporting System (NIRS)". A navigation bar contains tabs for NIRS, Trainees, Projects (selected), Activities, Products, Goals, Directory, Admin, Modules, and Logout. The main content area is titled "Standard Reports" and is divided into three columns: "All", "UCEDD", and "LEND, LEAH, PPC, DBP". Under "All", there are links for "Project Data Entry Errors" and "Project Funding Amounts". Under "UCEDD", there are links for "Funds Leveraged", "Projects by Consumer Participation", "Projects by Area of Emphasis and Funding Type", and "Projects by Area of Emphasis and Type of Action". Under "LEND, LEAH, PPC, DBP", there is a link for "TA/Collaboration: MCH collection". A "Fiscal Year" dropdown menu is set to 2012, with a yellow "+" button next to it. Below the dropdown, a list of years (2008, 2009, 2010, 2011) is shown, indicating that multiple years have been selected. At the bottom, there are "Run Report" and "Clear" buttons.

Suggestions for changes, feedback

- Attendees were asked to split in groups by datasets to discuss possibly helpful suggestions and report them back to the group. The suggestions have been compiled and will be analyzed to decide which ones to be implemented for FY 2013.
- Participants really appreciated getting to exchange ideas with their peers, and it would probably be good to make this a more substantial part of the meeting in the future. For the next conference, it was suggested that it would be helpful to provide best practices on data entering.

NIRS Future Projects For at AUCD

- A NIRS lab will be created on our website, where Data Coordinators will be able to provide suggestions for improvement throughout the year. Fellow Data Coordinators can provide feedback on these ideas, which will better guide us in deciding what changes are most important and helpful for the network.
- We will create a resource for MCHB Programs to compare what is required in the EHB and what is available in NIRS and how to best use the reports in NIRS to help with completing the Performance Report in the EHB.
- We will update all Data entry Error Reports as there were some discrepancies due to the changes implemented in June 2011. *Please note that as of February 10, 2012, the Data Entry Errors reports have been reviewed and updated, so they are working correctly now.*
- We plan on creating a Reports resource, to provide descriptions for all the Standard Reports in NIRS and the, so that the users know exactly what search criteria are used.

Aside from the regular means of contact for TA, email or phone, for those of you who are interested, we can always schedule phone calls, conference calls to one or more individuals at a Center (or several Centers) to provide TA on a certain topic. We can use screen sharing tools as well to make such interactions most effective. Just calls or email us when the need for targeted TA comes up, and we will be happy to accommodate.