PPC Trainee Follow-up Surveys & Annual Trainee Contact Update

INSTRUCTIONS

THE RELATIONSHIP BETWEEN NIRS AND THE SURVEYS

The web-based trainee surveys 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 <u>strongly</u> 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 from the Paper forms page on or through AUCD central office (contact Natalie Martinez at nmartinez@aucd.org or Dawn Rudolph drudolph@aucd.org).

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, 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 <u>extremely careful</u> 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/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.

FORMER MEDIUM-TERM TRAINEE 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 survey URL is www.aucd.org/nirs/db/survey/ppc_med.cfm

Use your regular system to ask your medium-term trainees to complete this brief survey. 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); Degree pursued; and Discipline.

**Don't forget to supply the unique login and indicate how your program is listed in the drop down menu of programs. A unique login is required to assure that each trainee's responses are captured.

ANNUAL TRAINEE CONTACT UPDATE (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 SURVEYS AND THE ANNUAL UPDATE

LOG IN ONTO NIRS
1. Go to https://www.aucd.org/nirs/db/index2.cfm
2. At the first field – "Center Name" – use the right downward arrow to scroll down and click on your program's name
3. 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)
4. Hit the Submit button.

NAVIGATE THE NIRS SITE
More information on NIRS is available through the on line *Data Dictionary* and *User's Guide*, which can be accessed online through the NIRS system.
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 ("nav 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 nav 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 (2018+)" to generate the list of former long-term 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 nav bar, access the trainee dataset
2. Select "Reports" from the submenu that will appear on the nav 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 *terminal or 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 2014: Long Term Survey Info													
---AAA-Test Center, PPC													
04/23/2018 03:44 PM													
Terminal Year^	**Type**	**Name**	**Address**	**City**	**State**	**Zip**	**Phone**	**Email**	**2nd Email**	**Survey Login**	**2 year out survey completed (completed FY18)**	**5 year out survey completed (completed FY18)**	**10 year out survey completed (completed FY18)**
2016	L	Caroline E. Test	123 Maplewood Dr.	Silver Spring	MD United States	20910				x95641268			
2008	I	Laura Walker	1010 Wayne St.	Silver Spring	MD United States	20910				aace29951750			

This sample table is for FY 2018: see that "FY 2018" is displayed in the header. The columns at the far left indicate the completed surveys for current fiscal year minus 2, 5, and 10 years (i.e., 2018–2=2016; 2018–5=2013; and 2008–10=2008). In this sample, the first displayed trainee's separation year was 2016 and she has completed her 2 year follow-up 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.

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.

1. From the top nav bar, access the "Admin" features
2. Select the "Export" option from the submenu that will appear on the nav 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.

View Trainee Long-term 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 nav bar, access the trainee dataset
2. Select "List Survey" from the submenu that will appear on the nav 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.*

View Medium-term 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 nav bar, access the trainee dataset
2. Select "Reports" from the submenu that will appear on the nav bar

3. Select "Summary of the Medium Term Trainee Evaluation" as your report, enter the date ranges, and hit "submit." (Note that you can also write your own reports by clicking on "Edit Custom Reports")

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 <u>strongly</u> 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 left nav bar, access the Admin features.
2. Select the "Misc Field" option.
3. Click on "Edit" beside the survey field, type in a question, and hit "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.
5. 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 hit "Save."

Note: More instructions on adding, editing and deleting user defined fields are available through the *Users Guide* in NIRS.

CONFIDENTIALITY ISSUES

We understand that some trainees will be uncomfortable providing personal information online or having it stored in a national database. If you run into this problem, please explain to the individual that only you as their training program and a few select individuals here at AUCD will have access to this information and that all reporting is done in the aggregate, unless permission is specifically granted to do otherwise. **You can also refer them to the confidentiality statement linked to the trainee follow-up survey:**

Confidentiality Statement
Thank you for agreeing to provide information that will enable your training program to track your training experience and follow up with you after the completion of your training. Your input on how well the training equips you to provide supports and services to individuals with disabilities and their families is critical to our own improvement efforts and our compliance with Federal reporting requirements. This survey can be made available to you in an alternate format upon request.

Please know that your participation in providing information is entirely voluntary. The information you provide will only be used for evaluating your training program. Please also be assured that we take the confidentiality of your personal information very seriously. This website is a secure site and the data entered is stored in a secure database. Only a few select staff at your

training program and at the Association of University Centers on Disabilities (AUCD) will have access to this information. Individual records will be kept confidential using the highest professional standards.

As you know, your training program already has similar information and, at your request, viewing of updated information can be restricted from AUCD. None of the information that you provide will be used to individually identify you to any outside agency, such as the Maternal Child Health Bureau (MCHB) or Administration on Developmental Disabilities (ADD). Any information supplied to these or any other federal agencies will be done on an aggregate basis in such a way as to preclude the ability to identify any individual trainee. If you have any questions, concerns, or need the survey in an alternate format, please contact the Director of the Center from which you received your training or Natalie Martinez at AUCD (nmartinez@aucd.org) or 301-588-8252.

We very much appreciate your time and assistance in helping your training program, AUCD, and Federal agencies assess the outcomes of the training we provide. We look forward to learning about your academic and professional development.