ROUGHLY EDITED COPY

AUCD

OCTOBER 20, 2021

DATA COORDINATORS QUARTERLY MEETING

Captioning Provided By:

Caption Pros

20701 N. Scottsdale Road, Suite 107-245

Scottsdale, Arizona 85255

www.captionpros.net

***

***

>> SOLOMON LISSANU: Can you guys hear me? Show me. Hello and welcome to our annual meeting. We would like to thank you all for joining us today. My name is Solomon Lissanu. I'm a data support manager at AUCD. I used to work as a data support manager for a national organization which advocating for people with intellectual and developmental disabilities. Their national office is here at Washington, D.C.

Prior to that, I worked for a school where children with ADD and ADHD learn. So I am very familiar with the disability community. Now after I came here, a proprietary online database built and use exclusively by AUCD. So I'm still learning the database. I'm looking forward to working with you all data coordinators in the years to come.

So before we begin, I would like to address a few logistical details. This call will be recorded, and later will be posted on our website on the resources page. Everyone is muted. But you do have the ability to unmute yourself. Because of the number of participants, please mute yourself throughout the meeting. You can also submit your questions in the Q&A box. If there are time for questions, I will read them aloud to accommodate all the attendees. And we'll go through only meeting questions later.

Today we have CART captioning available, and if you would like to access it, please click on the CC button to view subtitles. If you wish to make the captions a little bigger or smaller, please click on the CC again and select settings. You can move your caption box to preference, so feel free to adjust it as needed.

We ask that if you do wish to speak, please unmute yourself and begin by saying your name. This will help everyone know who is talking, especially the CART captioner. In addition to stating your name, we also ask that you provide us a short description about yourself, as well as your pronouns, if you feel comfortable.

This meeting is being recorded, as I said earlier, and will be available a few days following the event as well as a transcript from the captioner. Again, I want to thank you all for coming today. So can you take me to the next slide?

Now let me introduce you our AUCD staff. The first one is Jackie Cyzia. She is our senior manager for MCH second one is Sarah DeMaio, a senior program manager for UCEDD team. Next one is Oksana Klimova, our director of web services. The last one is me, the data support manager.

So I want to also remind you that there will be a -- thank you, Sarah. I also want to remind you that there is a short survey. So we would like you to fill out at the end of the meeting. As you can see on the screen, there is a QR code that takes you to the survey. Just point your cell phone at the QR code and the survey will open for you. Or you can go to the link and click on the link. That will also take you to the survey page. Next slide.

Agenda items. Okay, the first one we have already done it, introduction and welcoming. And the second agenda is a summary of FY-21 NIRS updating. Oksana, our web development director will go through the updates in 2021.

The third one is the proposed updates in 2022. This is categorized into three parts and will be presented by AUCD staff. Category A, the first one is the proposed updates included in this category will need in-depth discussion before any technical implementation.

In category B, the proposed updates included in this category requires additional feedback from our data coordinators. We may discuss them depending upon time.

The third one, the category C, the proposed updates include in this category do not require additional feedback from data coordinators and will be completed by us by AUCD. And depending on time, the mentorship and coaching breakouts will have, we'll have breakout sessions. We'll have two groups. One will be AUCD.

Please join one of our groups. You choose depending on your needs. Either the UCEED group or LEND group. I will leave the floor to, for Oksana who will present our summary of FY-2021 news updates. Thank you and go ahead, Oksana.

>> OKSANA KLIMOVA: Yes. We will go through, I just want to say, we will go through the list of updates that happened last year. All these updates were shared with you through the year. We put them together to make sure that nobody missed anything. So Sarah, welcome. Sarah will open this section.

>> SARAH DEMAIO: Thanks, Oksana. So the first update that we have, I'm going to start off because this one is UCEDD-only update for UCEDDs who we've been hearing for a long time, you would like the five-year report built into NIRS and we have finally done it. We're proud to announce that you can now access your five-year closeout reports, which will populate as your annual PPRs do, already calculated and

summed up and the data entered, the quantitative elements entered in your admin module.

You'll click the dropdown, and on the right-hand side, you'll see five-year closeout report. You'll have to add a new one when the time comes. We were eager to deploy that this year because we had two UCEDDs completing their five-year closeout reports, and we thank them for being the Guinea pigs to get this launched and working out some of the kinks that happen with launching a new element in NIRS. And so when 42 of the UCEDDs are writing their five-year closeout report, we hope that it will go very smoothly next fall. So that will be available in September when the five-year closeout reports are due.

We will be doing a full rollout webinar. I'm not going to go into a lot of detail today, because after we make a few adjustments that you'll hear about later, we'll have a full rollout webinar in January. I think Oksana is going to share this one.

>> OKSANA KLIMOVA: As we all survived the 2019 COVID year, we introduced all new data sets, I mean projects, product and activity. So when you enter through the year items into those three data set, you can identify if it's COVID-19 related item or not. Field, as I mentioned is not required checkbox. We implemented reports that right now you can find those reports in this section, standard reports for all UCEDD and LEND center type.

So that was implemented last year and report and field have been active. Thank you, Sarah, for demonstrating that. Next slide, please.

>> SARAH DEMAIO: I think that's me again.

>> OKSANA KLIMOVA: Sarah, I will pass it back to you.

>> SARAH DEMAIO: So we're also happy to announce that now in the faculty and staff profiles which you can enter either through NIRS in the directory data set, or through the directory -- the public directory updates, we now have fields for faculty and staff to indicate their gender and their primary language. So that will help us get a sense of how our network's demographics are evolving over time.

And I will pull that up so you can see that. And the public-facing directory updates that falls all the way down here under the additional information. We have male/female and gender identity not captured accurately above. And then language, we have an option to enter Spanish or another language. And no, I do not speak another language. Language other than English at home.

I particularly wanted to point that out because those are fields that are required fields. So if you are doing reminders to your faculty and staff to do their directly updates, as I hope has become part of your process at the beginning of the training year, they may see those additional fields and need to complete them. So we did add into the PowerPoint the links for creating a new profile or updating an existing profile that are public facing and the data coordinators, as you know can do the directory updates directly through NIRS.

Just a quick public service announcement to send out your directory update reminders to staff and faculty. There's another item that's been updated in the directory data set, and I can pull that up again so you can see what that looks like here. We have updated the primary discipline dropdown list and discipline checklists so that they aligned with what had been updated in the trainee data set. So primary discipline and the checklists have been updated.

We also added two network-wide reports that are only available to central office staff. And I'm not sharing that just to brag. I'm just sharing that so you know what data we are regularly asked to share. So there's two reports that we have built into NIRS because we get frequent requests about funding levels across the network and where the leveraged funds are coming from. So there are two reports. One that kind of summarizes UCEDD in various funding areas. I'm not going to share that publicly because that's a little bit sensitive information.

But I will show you, there's a report that shares the funding levels in a summative fashion by funding area. So you can see, we have a report here that shows the whole network size. This is a $600 million network number that you'll frequently hear quoted by our organizational leadership. Our network has quite a large reach. And so we have available numbers of how much funds are leveraged from all of these various sources, the federal source, state, local, and other types of funding.

I particularly wanted to mention this. We got quite a few questions that came in this past PPR season where people were not sure where or how to document their core funds, and I wanted to make sure that all data coordinators are aware that the place to enter your core funds would be OIDD and that if you enter it there, then it won't -- we automatically subtract that number out of your -- because it is funds that come from

OIDD, which is the Office of Intellectual and Developmental Disabilities, the administration at ACL, that number is actually in the report right now, that number is not correct. It says $35 million. It should be $38 million, which means that a few of you put that number some place else, and I want to make sure that everyone is aware that your core grant funds should go in the OIDD line for your leveraged fund reports.

We also wanted to share that because it helps us kind of market our network and demonstrate our strengths. So please attend to making sure that you're filling out that information and also helps us identify trends within the UCEDD, AUCD network, UCEDD/LENDs to inform where partnerships exist with federal agencies and where we might continue to grow additional partnerships. So this is a reminder of where we should be adding the core grant fund to the OIDD line. Oksana.

>> OKSANA KLIMOVA: I will pick this up. Last year, we got comments for the ordering information field name. That feel name displays list of faculty and stuff from the center. The complaint was that in the past it would display full list of faculty and staff, despite their status. As you may know, profiles, faculty profiles can have status display, not display, inactive, pending, waiting and rejected.

So we adjusted that list. We limited only displaying faculty that have status display and not display. Currently, you will see pulldown list and in parentheses, we spell out the status for each person. The screenshot, as you can see, for example, is Carrier Caroline, her status do not display in online directory. Keep scroll, Sarah.

Yes, ordering information, the field name, yes, that one. So right now, you will see only faculty staff with statuses display and do not display in online directory.

Same logic was applied to contacts field in the project data set. We reduce list of faculty online, directory faculty on that list. We displaying only faculty that have status do not display or display in online directory.

So in the activities dataset, there's a report, TA collaboration and the collection report. Based on new requirements from MCHB, the report requests total number of activities and total number of recipients.

In the previous report, those numbers, we didn't include those numbers in that report. We updated it, and currently, you will see in the first and second column total amount activities, collaboration activities, and total number of recipients. Next slide.

There was a request for standard report for activity dataset where the primary target audience is national. Currently a report can be found in the standard report and activities dataset, standard reports in the most left column for all center types, UCEDD and LEND. And that's conclude all our updates for the past fiscal year 2021. And we opening new section of our meeting discussion of proposed updates.

Those updates were collected through the year. Some actually -- we collected wishlists. Some of the task came not only from last year, but from the past years. So with that, can we have Solomon, do you want to talk about a different categories that we're proposing in this section?

>> SOLOMON LISSANU: Yes. So the next slide talks about, we look into the updates for fiscal year 2022. As I mentioned earlier on the agenda, there are three categories. Category A, category B, category C. And the category A, those are the proposed updates. Included in this category, we'll need in-depth discussion, and we might need to do some survey or work group before any technical implementation, which means we need further discussion with all data coordinators before implementing.

In category B, the proposed updates include additional feedback from the data coordinators. In the last category, which is category C, the proposed updates include in this category, do not require additional feedbacks from data coordinator, but will be completed by us, AUCD.

With that said, I will leave the next one for Jackie, who will go through some of the proposed updates for fiscal year 2022. We'll go to the next slide.

>> JACKIE CYZIA: Thank you, Solomon. Hi, everyone. Good to see you. So the first category A update, which requires a little bit more in-depth discussion before implementation is improved NIRS and EHB coordination. This is very timely, particularly for LENDs that have their performance review due on Friday. I know that many of you have sent emails in the last 24 hours with some of these questions. And I will note before we have this discussion is that Oksana and I will be available at the end of today's call. If you have direct questions about your performance report that I know is very timely to make sure that you have the appropriate answers to.

So this -- for this first category, of the the improved NIRS and EHB coordination include refining existing reports within LEND, as well as adding any missing reports or needs. We do recognize that the NIRS import does not cover all sections of the EHB that's required within their performance report due to some narrative sections.

So that, of course, we are open to feedback of as we're going through this week, if you're fining things that are not aligning as well, we would love your feedback on that, as well as clear label and references.

So relabeling the standard reports for LEND so people know which reports correlate with which sections in EHB. We received a new questions this week regarding this.

And then finally, for all activity reports as it relates that have count, the ability to retrieve a list of which activities are being counted. So for instance, if you have counts for activities in collaboration with state Title 5 programs that count as either training or continuing education, you're able to not only see that total number, but also the activities within the category. You can go to the next slide.

So this is just an example of two that related to the previous slide of requests that we have received in the last year. And this regards improved coordination, as well as the list of activities I just mentioned. I would like to open it up now, and of course, if you have specific question, we will have time to discuss those as it relates to LEND and the performance report. But I think it would be great just to open up, if it's fresh in your minds in terms of what have you seen as you're into EHB and submitting your performance report of any issues that we should be aware of. And then, of course, we will discuss these issues and we will coordinate with MCHB to make sure that it's improved for 2022. I see that Casey has his hand up. Feel free to unmute yourself.

>> CASEY SOWERS: I just had a question. It's the first time doing the EHB. But one of the things that was noticed is that there was a number of individuals served under state and community partners, which we haven't been -- on some thing, we do have number, but on others we don't. It's more private information with the community partners, as well as the state. So I mean, if we're doing something with the Children's Trust at a very high level, are the people affected thousands? And we enter that number? Or how do we calculate those numbers?

>> JACKIE CYZIA: That's a great question. That may be something we want to touch on at the end. If you have questions on how to count thing, you may want to ask your MCHB project officer if you have certain questions about that. I will send the link in

the chat to the LEND performance measures that kind of go into that in more detail. I'm happy to talk with you after, Casey. Anyone have any other questions as it regards to NIRS and EHB coordination? Or things that you've seen?

>> ANGELA HARNDEN: This is Angela from Oklahoma. We did have one today. On the list A, the topics of technical assistance collaboration and NIRS, it has interdisciplinary teaming. And in the EHB, I'm trying to remember what it is now, but it's different. It's interdisciplinary training.

>> JACKIE CYZIA: Thank you for that question. We have received a question from a number of members that some of the lists are not matching up, and we've seen that when it's coming to a TA or collaboration activity versus a continuing education activity. Is that where you're seeing the difference?

>> ANGELA HARNDEN: Yes.

>> JACKIE CYZIA: Okay. We need to streamline that in terms of what you're capturing as a TA activity versus CE and why those lists are different. I will put the LEND performance requirements in terms of what they're asking for in terms of CE. I'm happy to chat with you about that later as well.

>> MATT RENFROE: Hi. This is Matt in Kentucky. You've gotten a few emails from me about getting started. I'm a long-time UCEDD and getting just started as a LEND. I have a good grasp of the UCEDD reporting, but trying to sort out the reporting cycles and exactly what's expected on the LEND side. So you'll be hearing a lot more from me. I don't think I have a specific question right now, other than we do a monthly report is that accurate?

>> JACKIE CYZIA: So it's up to you in terms of how you import your data. I know that many LEND programs import their data into NIRS monthly as a way to make sure it doesn't happen at the very end. I can send you in terms of what's expected as well as the PowerPoint -- not the PowerPoint, but there is a recording from MCHB that goes through the reporting requirements in terms of what is due.

So for LEND programs that existed before July 2021, you have a performance due that's due the end of this week. For all programs that were funded starting July 1st, you have another report that's due in November. And that is for setting up goals. There's a couple other things in between those two, the year cycle in terms of sending out former training surveys as well, but in terms of actually inputting your data, that is completely up to you of how you do that. But we do recommend putting that often.

>> MATT RENFROE: Okay. I'm sure we'll get it all sorted out. That was very helpful, thank you.

>> JACKIE CYZIA: We can have a one-on-one after to make sure you're set up.

>> SARAH DEMAIO: I was going to say, there's a lot of new data coordinators across the network. Obviously there's a whole bunch who are new LEND coordinators, data coordinators. And we also had some turnover in the UCEDD coordinators as well which is why we're hoping to have these kind of coaching and mentorship small group discussions that are focused on UCEDD and LEND reportings so people who have been around for a while can share, oh, this is how I do it. This is my time line. I tried it this way, so we're going to have those breakout discussions at the end of today to talk about some more details on best practices between data coordinators. We're hoping to be able to do that at the end of today.

>> NINA ZUNA: That would be great. We're a new LEND, too. We have a lot of questions. That would be very helpful. And I don't know if this is something as a request or not, and maybe UCEDD LENDs would know this. We were entering the trainees, new trainees, and we have trainees that are long-term UCEDD trainees that are going to meet 300 hours. And then those same students are also going to be an intermediate LEND, because they're going to take some LEND curriculum. I didn't see a way to differentiate them in terms of this, they're only going to be intermediate for LEND and they're only going to be long term for UCEDD. It lumps the hours together and the report only shows them as long term. So I don't know if anyone else has run into that and has a way to differentiate.

>> JACKIE CYZIA: I think that's a good question. Let's save that just for the end as we have those small groups, because I think that may be a larger conversation. But I appreciate you bringing that up.

I think we'll move on, but as Sarah mentioned, we will definitely be having those breakouts and we can also stay on longer to discuss anything that's coming up for your LEND. Next slide.

>> SARAH DEMAIO: We have received a number of requests to make some changes to the language that is being used to gather demographic data and to make

changes as to what demographic data we are collecting from network member, both trainees and faculty and staff. I wanted to cover this because we are more than happy to hear recommendations. I want to make sure everyone knows we've heard the concern and we're going to be setting up a work group. Actually, there's a larger project on the UCEDD network side. Some of you may have heard, we are really working hard to implement what is called the equity, diversity and inclusion action plan.

In this action plan, there's a kind of guide for what the UCEDD network wants to do with regard to tracking we're going to be working closely with ACL in determining what is required, what will that look like, and we're going to hopefully be able to make some recommendations to them within that work group about changes in language so that we're being a little bit more inclusive and, quite frankly, aligned with best practices and the equity, diversity, inclusion space so that we don't force people to say their identity is Hispanic or Latino, Latinx, you know, how people identify themselves.

So there's going to be discussions in how to best capture the demographic data and we hope that will be in NIRS and be reflected in some changes in the ways that we're gathering the information from network members. If you're interested in participating in that work group, please feel free to put your name and note in the chat that you want to join the ACL work group on demographics, or email me directly sdemaio@aucd.org, if you don't have my email address already. I will put it in the chat in a little bit. We're just at the beginning stages of planning that work group right now.

I also want to acknowledge that we have heard feedback about the -- it's a little bit outdated list of roles gathered in the online directory for faculty and staff. So we did update the primary discipline, but we do need to do updates to the primary activity and discipline coordinator lists, because new roles have been created and the staffing structures have changed within our network over time.

We're going to align that with some of the work coming out of the ACL work group, but also, the next couple of slides you're going to see, we're going to be putting together a survey that will go out to network members so that data coordinators and directors and other council members of various kinds will be able pro-provide input on how people want to be identified and what rolls will be reflected. Anthony, do you want to make a comment?

>> ANTHONY CAHILL: Just a quick one for this work group. One of the problems with the work group is the roles aren't mutually exclusive. We get a lot of comments

about that, people are grumpy that they're being forced to choose one. They're right, by the way. I have one person who's a legislator, an adult with disability, a family member and a professional. I understand the need to kind of say, which is your primary role, but we're also by doing it this way kind of missing a lot of the kind of rich diversity of the people we serve.

What we ended up doing, we're asking the question twice. The first one, check all that apply. The second one is okay, choose one. It's longer than that, but you know, it really would be good to take a look at that, have the demographic group take a look at that.

>> SARAH DEMAIO: Thank you. That's a great recommendation. If you wouldn't mind sharing that, send it to my email address. That's a good starting point. As an old colleague used to say, technical assistance is all about sharing seamlessly and stealing shamelessly. So if you would share, I can steal a starting point for some of these discussions. That would be great.

I'm putting my email in the chat for anyone who needs it. And the other -- one of the other things that we're going to be serving the network about is requested changes to the way the public search function happens. Right now I think those of you -- let me pull it up on the website -- can see that when you go to the public search, we can search projects by core function and products by type. And we've had requests that people also be able to search by area of emphasis or by language to reflect the diversity of projects and products that are happening across the network. So we're going to be collecting information from the network about what they would want in some revisions to the way the public search function happens.

And then the third piece that's going to go into this network survey is updates to our funding resources. The list I showed you earlier is, you know, you may notice when you're entering your leveraged funds in places, there are times you're not sure where to enter things, or there isn't a good category that fits. So we're going to take a look at our other category and also survey the network to see if we can provide a little bit more of an updated list of what our funding sources are as a network.

Is this still me? I think so. So we are moving on to the areas -- we gave you that as a heads up, FYI, those opportunities for input are coming. But while we have you today, we're hoping to get some input directly from you with regard to some of the proposed changes that you could provide some quick feedback on. Specifically, we have heard in the project data set, kind of going back to what Tony said, we have heard -- you know, there's a field for consumer participation and that it's too restrictive, that that field only allows people to -- I forget what it is right now. But there aren't options for consumer participants who are researchers, or who are in project leadership. So I would be interested to hear if people have ideas of where we could expand that list and how. I think Oksana, I'm handing off to you here.

>> OKSANA KLIMOVA: Yes. The next one, we receive requests -- you're done with project dataset, right? We're not going to expect any feedback, we just will follow-up after this meeting? Currently there are six check boxes so we're looking for more options to add to that list.

The next item, we received requests to create a standard report that pulls emulation data. That translates into customer satisfaction and initial outcomes. You see those numbers when it applies only to UCEDD. You see those numbers when you report -- when you complete PPR report. It's only one place where you can find those numbers. And as I recently said, you can only trust this place because there is no other way you can correct that information. So the suggestion was to put -- to include those data into the standard report section.

Our question to the group, it's first applied only to UCEDD. And is it single request or the community or the coordinators feels it will be helpful to multiple centers, that there is a need to see those data and they will welcome the new report in the standard reports section.

I mean any reaction, we can continue to go through the list. We can come back to that on our data coordinators meeting if the group feels like they need to think about this.

The next slide is related to the activities dataset. Currently the suggestion was to display different data on the lending page for managed activities. Currently, when you access management activities web page, you see six columns. It's title, manage, where you see three-dotted action menu, core function, date of activity, date when you added item to the database, and when you edited your item.

The proposal -- the proposed new column was to add activity ID number. There's a technical limitation with display. The page can include only six columns. You can actually make window fit to your -- to the different devices, that type allowed only allows six columns to display. So the question to the group, is there still an opinion that the activity ID number is a good information for the manage activities page. And the second, if it's a good information, what column would you want to replace with -- you would want to swap for activity ID number?

And again, I didn't expect that it will be immediate reaction from the group. Oh, there is one, Anthony, yes?

>> ANTHONY CAHILL: We don't use the ID number, activity ID. And I'm seeing in the chat box that actually a number of us don't use it. So, you know, for -- well, look at the chat box. It may not be something that is a pressing issue. Just saying.

>> OKSANA KLIMOVA: It's good feedback. Anthony, thank you so much. Thank you for the comments in the chat. I didn't scroll it fast enough. So at this point, we will probably put it low priorities, and we will keep it in the wishlist if things will change. That way we'll come back to that.

And we're moving to category C. Sarah, I'm handing this to you, right? Five-year report edits?

>> SARAH DEMAIO: Yes. So just as I mentioned, we had two UCEDDs who used the closeout report. There were a few glitches, so we are going to be fixing those glitches. They were able to successfully submit their reports. It wasn't anything that stopped it from being successful, but that might have caused some confusion if we have this 42 UCEDDs who are reporting their five-year closeout report next year. So we're going to fix those and then we're going to do a rollout webinar in January of 2022.

So this category C just a list of updates that we're doing. So you know that they're going to be happening and you'll see them possibly show up in NIRS and hear about them in quarterly calls. We're also working on changing the language throughout NIRS because ACL has renamed and restructured. And so AIDD doesn't exist anymore. And that still is lingering in a couple of reports here and there. So we're working on updating all the data fields in NIRS itself and in the reports, the PPR to reflect the new language, OIDD.

We did receive a request around utilizing an international keyboard reflecting the reality that our network is becoming more diverse and engaging in more diverse activities. There's a need for nonstandard English characters for titles, for names, for product titles. And so we're going to look into that. We're going to do some research on our end, and if it is easy to implement, we will implement that. And you may see that become available. If it's more complicated, we'll come back and talk about the process figure out where it lies in a priority list.

We are also -- we heard feedback from the data coordinators over the course of the last year that in the products data set -- also I heard it would be useful to zoom in on this. So in the products data set, there's a -- am I covering the right item? The author field for the UCEDDs will not be required. Am I in the right place here?

If you're a UCEDD only, right now we've got this author types content that is required, and it says LEND faculty member, lend trainee or LEND staff. If you're a UCEDD only, you don't have any of those. So right now, this is still a required field and we're going to fix that glitch.

>> OKSANA KLIMOVA: There's a little correction. You can actually -- it's displayed as a required field, but you still can submit it. So we will work on this that actually user interface will align with functionality. So you still can submit it, but it's confusing because users think that it is required.

>> SARAH DEMAIO: Cool. I'll remember that, little asterisks. And then, I think I'm handing off to Jackie on this slide.

>> JACKIE CYZIA: Thank you, Sarah. If you're part of a LEND, authors is required, and it doesn't need to be your primary author listed as an author type. If it's your secondary author, someone needs to be part of a LEND. So just wanted to clarify that because that's been a question we received.

>> OKSANA KLIMOVA: Sarah, on the products published and submitted materials, yes. It's different material type. It's peer reviewed publications. Yep, one of those, yep.

>> JACKIE CYZIA: You can probably stay here because my next update is regarding the APA citation. And as some of you know, you can add the author first. The dropdown list of staff, we will actually be deleting that option, so there will only be this blue box for you to enter your APA citation. I know that's been confusing for some folks and received some questions about it. Let's go back to the slides.

My last update is that all training programs have the ability to add custom questions to their long-term trainee survey. That has not been the case for DBP. So that's something we're adding this year to make sure DBP also has that ability. And that's it in terms of my updates.

>> SARAH DEMAIO: So I think we have an option to do open discussion of Q&A questions, but it sounded like there was a kind of priority in our earlier discussion for people to kind of, especially new data coordinators to talk to some of the more experienced data coordinators. So we've got half an hour left. So we're going to move to our breakouts. And we'll give you all about 25 minutes to have -- and these are going to be self-select breakouts. I'm going to launch them pretty shortly.

There will be one breakout for problem solving, coaching, mentorship focused on MCH reporting, if you're a lend or DBP data coordinator. And there will be one for UCEDDs. You are welcome to move between them. We do encourage -- so half an hour to the end of the meeting. If you are an experienced data coordinator, we do hope that you participate in mentorship in these rooms and move to one of the rooms. If you are both a LEND and an UCEDD, you can decide for yourself where you feel like you have the greater questions or the greater expertise to offer, or just an interest in sitting in.

We acknowledge that there are a lot of questions right now for the MCH programs who are doing their reporting this week. So we want to make sure that you have time to ask those questions. So I'm going to launch the breakout rooms right now. You'll see an option to -- you should see an option to select your own breakout rooms. Solomon and I will be going to the UCEDD room fairly shortly and Jackie and Oksana are going to assign themselves to the MCH breakout room, and we can be available to answer questions as well.

>> JACKIE CYZIA: We've had panicked questions in the last 24 hours. So we can discuss any questions that you have here today.

>> NINA ZUNA: My name is Nina and we're a new lend. We have two sets of questions. I'll ask one that might pertain to others submitting their reports. And this is in reference to attachment D, the total number of TA recipients. And I had some confusion around the list that's provided. Is this the total number of agencies only? Like Title 5, state health department, education, or are we supposed to list the number of entities within an agency? So like education would be the broad one, like the number of schools we provided TA to, the number of family groups. Or does it go way down to the third tier, the number of individuals and participants, like the number of teachers or family members. How do folks report that in terms of TA recipients?

>> JACKIE CYZIA: Some of the more experienced data coordinators, what are you typically doing? I also think this is what Casey, who is not here right now, was mentioning earlier.

>> CRISTY JAMES: We do it at the agency level. That's what our project officer told us to do.

>> NINA ZUNA: So if there's only the big state health agency or, you know, whatever state that we're in, Kansas Department of Ed, Texas Department of Ed, then it just seems so few. I know our project officer showed, like, some sample form and they had, like, 300 or more TA recipients. And there's only, like, 20 in the list of that broad list.

>> ROBYN CARROLL: I'm an experienced UCEDD but only five years in on LEND. So my understanding is that if the information is being pulled from NIRS, the way that we enter type of participants -- or, well, the number of participants under the participant type category is that it's by individual.

>> OKSANA KLIMOVA: By individual, yeah. I was scared to say because it's not my territory, but yep, Robyn it's right. It's by individual for pretty much all core functions.

>> KELLY HEUNG: This is Kelly from UC Davis LEND in California. I'm pulling up the TA section. That asked for the number of activities. But there's another form and I haven't looked at it for a few days, where it will break it up by agencies and then participants, and then national partners. Does this ring a bell? It's like in the same table where it asks these. And that's where I think you put the number of agencies and it's small, right? It's a smaller number.

But it's odd to me every year that that table does a sum across. It sums up all the agencies with participants. So I'll put participant, 200 people. But then, like, two agencies and the sum is 202. It's odd to combine it like that. It never feels quite right. So I guess in kind of related to this question, participants, it always felt like a mix to me. But I'm hearing some people only do individuals? I don't know.

>> JACKIE CYZIA: Does anyone do it differently? And I would say most of these questions, it's always good to get confirmation from your lend project officer, if you have questions on how things are counted and how you're inputting the information, because it's always good to have an understanding of how they -- you know, we have the performance measure, but if you have direct questions of counting whole agencies,

counting the participants, how you are inputting the information, I would say they're always welcome to answer those questions as well.   Anyone else have feedback on that?   Nina, did you have a second question?

>> NINA ZUNA.   Yes.   Thank you, Kelly for your comment, too.   We had agencies and participants in different areas of the report.   6 the second question was the trainees, because we're a UCEDD LEND now, and we have a set of trainees that are receiving their 300-plus hours through our UCEDD training, and then they're also receiving some LEND training, but only at the intermediate level.   And there wasn't a place in NIRS to differentiate them as a long-term for UCEDD and only an intermediate for LEND.

>> JACKIE CYZIA: How are other UCEDD/LEND programs dealing with that?   Or is this something we need to address?

>> MATT RENFROE: As a complete novice with a lot of question, I would imagine you would designate trainees either UCEDD or LEND since the categories, or attributes are very similar for both.   But you can tell me if it's possible or beneficial to have them in both.

>> MICHAEL BRAY: I can tell you what I've done and propose this question to Jackie and Oksana.   When you go in and add a trainee into NIRS, long-term, medium-term trainee.   When you create the trainee or the year record, there's a set of records, is this trainee a UCEDD pre-service prep trainee.   And you can also select is this trainee a long-term or intermediate LEND trainee?   Correct me if I'm wrong.   This is how I've always seen this section is that's where you're designating whether that trainee is a LEND trainee and/or a UCEDD trainee.   Is that correct?

>> OKSANA KLIMOVA: Partially.   When you select ours, it's button -- I'm giving technical for how it's work.   That identify number of hours for that current fiscal year, how you mark your trainee, long term or intermediate, above that selection there are two fields.   One is where you can see LEND trainee.   Or it's UCEDD trainee.   Here where I'm stepping into unknown territory.   I know some centers select only LENDs and don't select UCEDD.   But I saw cases when both categories checked for trainee.   I'm looking actually at Robyn in my video camera.   I saw the cases when data coordinators select LEND and UCEDD.   And after that, you go to select your hours.   Robyn, if you can give more substance, TA substance to the technical picture, I will appreciate it.

>> ROBYN CARROLL: I will try. We're a UCEDD and a LEND. We count most of our trainees -- well, most of our trainees are LEND trainees. And we count -- if a student is a LEND trainee, we also count them as a UCEDD trainee. However, we also have -- so that's the majority of our trainees, we're checking both boxes.

But for -- we also have a subset of trainees that we only count for UCEDD because they are -- they wouldn't meet the requirements for LEND, such as, they are an undergraduate or they're enrolled in a different curricular program or something like that. So we do have a handful every year also of just UCEDD trainees.

But for each of those, even if they're UCEDD and LEND, we're -- we can only select one of duration, the number of hours for that student. Seen it would be what -- if it's LEND, we would tend to defer to the LEND hourly requirements for that.

But we've also had circumstances where a student was a long-term trainee one year, and they continued on in another capacity, and so for that second year they were an intermediate. And that works. However, it can throw things off with thinking about surveys and other reporting and imports, so just really pay attention to that, if you have multiyear trainees.

>> KELLY HEUNG: We're similar to what you just said, Robyn, where most of ours are LEND and then a handful that are UCEDD only. Nina, maybe this is what you're talking about, too. You can add your hour, you can do it combined, right, if they're LEND and UCEDD. You can say oh, my LEND trainee qualifies as long term. But then I know with CEDD, they've done another 100 hours. Do you do 400? Meaning you add the numbers together or not?

Where it's gotten me in trouble is if I combine the hours -- so let's say they're a LEND intermediate. I say okay, they're 150 hours, great. But if they also do 150 hours for CEDD and I report 300, because I add them together, NIRS, it triggers NIRS to say oh, this is a long-term LEND trainee, because they've reached 300 hours.

The problem is when you're doing your formal trainee surveys and they're giving them surveys for the former long term, that's not correct. They're a LEND intermediate. But NIRS says uh-uh, they're a LEND long term. So I'm going to give them the long-term survey. I've asked Natalie this question a few months back before she left. I can't remember if she suggested or I said, is this the right thing to do, but I think she was saying yeah, this sounds good.

You could go into NIRS before that survey is triggered and adjust the hours so that it's the correct hours you want. So maybe instead of writing 300, you bring it back down to 150 and then the survey will be triggered correctly, and then you could go back and change it after the survey is done.

I didn't do that. I can't remember what I did, but it felt very complicated to do that, and I hate messing with data and number, so I would love a solid answer to that. I mean, ideally, NIRS would be able to split it up so you could import two numbers. How many number of hours for LEND hours? How many for CEDD training hours. That would be awesome if we could do that.

>> NINA ZUNA: I was thinking just enter them as a trainee twice. It would be a duplicate, but it would show the hours for UCEDD and then 40-plus for the LEND. That way it doesn't trigger the LEND survey, but it would trigger the long-term survey for the UCEDD. But then there would be a duplicate record and I would have to subtract the actual number of trainees. It is an issue, but I don't know how common it is among other UCEDD/ LENDs where the trainee is completing in both.

>> MICHAEL BRAY: For us it's not common. Most are LEND trainee, so we don't run into this often at all. I wonder if maybe one of those wishlist items, long-term wishlist items would be to have an option similar to the activities data set where you have a UCEDD or a LEND option when you're entering a trainee's initial record. I'm sure that would fracture a lot of things so I'm not sure if that's feasible or even something that people would want. But just kind of throwing it out there.

>> MATT RENFROE,: it was not in any way funding based? You're just doing it based on what program, what university program they're in?

>> NINA ZUNA: They're getting funding through OSED. So they're getting the OSED funding and they're getting training curriculum through our faculty and staff for the UCEDD. But for the LEND, they're not receiving dollars because they're intermediate training. I like as a wishlist put in the actual number of hours for a trainee split so it's not a duplicate record, but it can calculate it properly.

>> OKSANA KLIMOVA: I wrote it down. I will add this to the wishlist. It will go across the NIRS because it may affect bunch of reports. But I added it to the wishlist, and if we will have time, maybe we can talk about not only full LEND, but in the meetings,

you know, include UCEDD also, see if this is something that would be interested if it affects other centers. Yep.

JACKIE CZYZIA: Are there any other questions on that or other wishlist items? I know I received some emails this week about some of the differences between the EHB and the NIRS import, which we are going to be coordinating with MCHB to see if things can be adjusted in NIRS. But if there's anything you have seen that we haven't called out. Or if you haven't emailed me with those examples, you can feel free to do that. But if there's any other -- we don't have to talk about that, but if there's other questions. Just want to make sure you guys are all set for your performance report.

>> DINA JOHNSON: I was shocked to hear we're going to have a five year. I thought they were going to do away with those. I just want to make sure LEND isn't going to do that.

>> JACKIE CYZIA: Not that I'm aware of. But I will have -- I have a call with MCHB tomorrow to go through some of the NIRS items, so maybe I'll have some further clarification.

>> ROBYN CARROLL: And for us, the report due Friday was the fifth year in the five-year cycle and it was considered to be a period, like a project end report. So I'm counting it as a five-year report, you know, as I'm thinking about it. And then the report that's due in two weeks is for the first year of our new five-year cycle.

So I think that, at least right now, that's how it's been conceptualized for, you know, within the EHB and so on. For UCEDDs, we've always had a five-year report, just to clarify that that's not a new requirement. But the pulling data directly from NIRS into the five-year report is what's new. And I'm sure some of the fields -- because I was art part of five-year template work group for data coordinators, so I think that some of the work we did several years ago is now I'm going to see it come to fruition with this. So it will be interesting to see. But we've always had a five-year report. It's just that it will be different.

>> JACKIE CYZIA: And MCH doesn't refer it as a five-year report. Although, as Robyn stated, it does come to it at the end. And again, I can talk to MCHB tomorrow. We need to make sure there's a couple of sections, Dina, that you mentioned as well they've taken out from the performances. Listing the five to ten most impactful TA, I forget what they call it. The TA activities, which is no longer included. So there were

some changes and seeing what will be making sure what's included, particularly as you guys enter your fifth year which is a ways away. But want to make sure you have everything you need.

So I know we only have four minutes left, which is not a lot of time, but I just want to make sure for others that haven't spoken up yet, if they have questions for more seasoned data coordinators, or if there's other wishlist items. I appreciate all your feedback so far. I think it's really important. Have all of you submitted your LEND report then?

>> ROBYN CARROLL: we did this morning.

>> JACKIE CYZIA: Great. There will be reports of EHB not showing up for others. So my recommendation is to try to submit earlier than later. I think all of you know that, but just making sure.

>> NINA ZUNA: Can you remind us where the recording is on how to do an export from NIRS to EHB? I thought I saw it at one point in time.

>> OKSANA KLIMOVA: Yes. Under the admin tab, under the column manage data, there's an option, export. And by clicking the option, you will -- if you select it, you will see three columns, and you can you can export different -- select the year and select data set that you want to export. And it's from trainee, project, activities, projects.

>> NINA ZUNA: Okay, thanks. Hopefully there's no glitches. If more seasoned folks use or don't use the export function regularly.

>> JACKIE CYZIA: Does anyone on the call use the export function?

>> SARAH DEMAIO: I don't know how the MCH breakout went, but the UCEDD was great. We came up with a lot of resources and ideas. So thank you all for your active participation. If you're new, thank you for your questions. If you are an experienced data coordinator thank you for sharing your ideas, recommendations, resources, experiences. I'm going to hand over the mic to Solomon to close us out. And my understanding is that Jackie and Oksana are going to stay on for beyond the meeting for as long as anyone has questions regarding the MCH reporting. Solomon, do you want to close out the meeting?

>> SOLOMON LISSANU: Yes, yes. Thank you, Sarah. We've got three minutes to go. So thank you, everyone, for attending this meeting. And that was really nice.

My first meeting and my first annual meeting with the coordinators. This meeting is recorded and it will be available on our website pretty soon. And if you have any questions regarding NIRS, we have this new email address. NIRS@aucd.org.

Our next quarterly meting will be on Wednesday January 26th, 2022. Same time, 4:00 eastern standard time. Lastly, I want to remind you to do the survey. That will help us with feedback of how this meeting went. And you can check it on your phone or go to the link and fill out the survey. And again, thank you for being here. And like Sarah said, we'll be here if they are questions. And for those of you who have to go, the meeting has officially ended now. Thank you.