Table of Contents

2.0 Administration of NIRS Profiles - Disclaimer 2
2.1 Overview of NIRS Administrative Profiles and Activity Staff Records. 2
2.2 Managing NIRS Users' Profiles..... 3
2.3 Managing Activity Staff Records 7

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

2.0 Administration of NIRS Profiles - Disclaimer

For illustrative purposes, I will present the NIRS Learning Module topics using AUCD's -AAA Test Center for a co-located UCEDD + LEND, which contains only sample or demonstrative data. Note that no actual program or participant details are used.

Please note that the forms shown in the demonstration videos may differ from the online forms, as forms are updated each August based on federal guidance.

If you have any questions, please message NIRS@aucd.org.

2.1 Overview of NIRS Administrative Profiles and Activity Staff Records

Welcome to the video of the "Administration of NIRS Profiles" section of the NIRS Learning Modules, titled "Overview of NIRS Administrative Profiles and Activity Staff Records". In this video, we will review the purpose of NIRS User's profiles and Activity Staff records.

It is important to note that NIRS User's profiles and Activity Staff records can be managed only by NIRS administrators.

First, what are NIRS Users' profiles and Activity Staff records? NIRS Users' profiles and Activity staff records are two distinct lists in NIRS. We will discuss NIRS Users' Profiles first and then go into Activity Staff records.

The NIRS User profiles are created by the administrator for faculty and staff. With a NIRS account, faculty and staff can log in to the NIRS application and manage data. Based on the security level, they can manage only their own data or the data for the Center/Program.

NIRS Users' profiles, accessed via the Admin section under "Manage NIRS Users Login", controls who has access to NIRS. When you log into the NIRS application, you need a username and login to provide access to the system. The Center/Program administrator assigns credentials (username and password), and level of access to each profile. The NIRS administrator

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

controls the level of access to the sections the faculty or staff members can view and manage data in NIRS.

AUCD expects that all Programs will maintain control of access to their password-protected data connected with federal reporting. This is to ensure that no one has access to your data unless you want them to have access to it. To ensure the security of your data, each person entering or managing data in NIRS should have their own unique username and login.

Activity Staff records are a list of faculty and staff names that are used in the Activities and Products Datasets for reference purposes.

Activity Staff records can be accessed in the Admin section via "Manage Activity Staff". Activity staff are any internal or external collaborators with whom you may work with on various initiatives or deliverables. Adding collaborators to the list allows you to quickly and efficiently select names from a drop-down list during data entry, which will save you time in the long run.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

2.2 Managing NIRS Users' Profiles

Welcome to the video of the "Administration of NIRS Profiles" section of the NIRS Learning Modules titled "Managing NIRS Users' Profiles". In this video, we will demonstrate how to manage NIRS Users' profiles.

NIRS Users' profiles can be accessed via the Admin section by selecting the "Manage NIRS Users Logins". NIRS Users' profiles allow Program NIRS administrators to create faculty/staff profiles and provide access to manage data into the NIRS system for federal reporting. AUCD expects each Center/Program to manage access for each faculty/staff member who will enter or manage data in NIRS.

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

Before creating a user profile, Programs need to make a strategic decision about who will enter data into NIRS. When deciding who should have access to your data, you might consider the benefits of the following two options:

- In option A, data coordinator(s) and administrator(s) enter all data in the NIRS application. In this option, you opt to have a single individual or a small group of highly trained individuals enter all data connected with federal reporting. This approach provides centralized data management and creates a point of contact for all data entry. It will also offer higher consistency in data entry.

- In option B, your faculty or staff will enter data into the NIRS application. In this option, you elect to have a data coordinator or group of data coordinators who will assist faculty/staff in entering data, oversee the process, and check data to ensure quality and consistency. You will need to train all faculty or staff who will enter data if you select option B. It also requires an additional data quality check process to ensure your data entry is consistent and accurate.

Once you have decided which method of data entry your Program will use, you can create profiles for selected faculty/staff members:

- First, log into NIRS. From aucd.org, click the “About” section and select “NIRS Login”. Enter your credentials. Once you are logged in, hover over the Admin section at the top of the page to bring down a navigation bar. Under the left column, select "Manage NIRS Users Login."

  From this screen, you can see a list of NIRS profiles that you or your predecessor(s) added to your Center/Program. Multiple columns provide the user’s name, contact information, login, password, and access credentials.

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

- To add a new NIRS user profile, you should click on the blue button "Add New NIRS Login" at the top left-hand side of the screen. From here, you should follow the prompt.
    - Create a unique login and username. This should be at least six (6) characters in length, including letters, numbers, and symbols. Logins and passwords are not case sensitive, meaning that a lowercase "m" is the same as an uppercase letter "M".
    - Enter the first and last name of the individual who will be using the account.
    - Provide their university email address in the next line.
    - For access level, you can view how each option impacts access to the NIRS system at the bottom of the page.

"**Read Only**" users have access to view all data fields except for personal and contact information in trainee records.

"**Assist**" users have access to Standard Reports, including reports limited to those with "Admin" access, but cannot enter or modify data.

"**Read/Write Own**" users have access to view all data fields except personal/contact information in trainee records that they did not create and may edit all records that they created.

"**Read/Write**" users have access to view and edit all data fields.

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

"**Admin**" users have Read/Write access and access to export the data to this form.

- For Datasets, you can select the Dataset(s) to which you want the user to have access to work in. If you want them to work with trainee data, check the "Trainees" checkbox, and so on. Each section of NIRS has a checkbox to customize the user's access to the system.

- If you want to assign a user to have access to your Network Member Directory for all faculty/staff members at your University, please provide the user Access Level = Admin, select the "Directory" checkbox for Datasets, and select the "Directory Manager" checkbox.

- Once you have made your sections, save the page. You can verify the selections by checking the listed permissions next to the person's name under the “Access Level”, “Access to Datasets”, and “Directory Manager” columns.

  You should provide the new NIRS user with their unique username and password, your Center name listed at the top of each page in NIRS, along with the login link to the NIRS application where you first logged into the system.

- If you wish to change the credentials of existing users, you should navigate to the Admin section, "Manage NIRS Users Logins", and find the user on the list. Under the "Manage" column, click on the three dots next to their name. You will see two options, 1) "edit"

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

and 2) "delete". We will cover the "edit" option first, then discuss the "delete" option.

Selecting "edit" will take us back to the page to update the user's credentials. This can be useful to update the credentials of faculty/staff members who need enhanced or reduced access to the system. This can be useful in editing credentials for faculty/staff who have had a change in responsibilities.

Once you are done editing the person's profile, you should save the page.

Clicking the three dots again will bring up the menu to "edit" and "delete." This time, select "delete." The system will prompt you to confirm.

When considering whether to delete a NIRS user from the system, please note that deleting a NIRS user is permanent and cannot be undone. Historical information is maintained for records that the user has created or edited at the bottom of each record in NIRS.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

2.3 Managing Activity Staff Records

Welcome to the video of the “Administration of NIRS Profiles” section of the NIRS Learning Modules titled “Managing Activity Staff Records”. In this video, we will discuss how to manage Activity Staff records.

Activity Staff are collaborators your Center or Program may work with. Please note that Activity Staff could be both internal to your Center/Program or external partners. The list of activity staff is accessed via the Admin section in NIRS under the right column by selecting "Manage Activity Staff." From this page, you will see the name of the activity staff person, the date when their record was last edited, and who created it.

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

Similarly to the last section, if you want to add a new activity staff record, click on the blue button in the top right-hand corner of the screen titled "Add New Activity Staff". This will take you to a very short form where you should enter the person's name and save the screen. Once you have successfully saved their record, their name will appear on the list in the "Manage Activity Staff" screen.

If you wish to edit an existing record for an activity staff person already on the list, you should click on the three dots under the “Manage” column next to their name. You will see two options, 1)"edit" and 2) "delete". Just as before, we will cover the "edit" option first and then move on to the "delete" option.

If you select "Edit", it will prompt you to edit the collaborator's name. You can then save the screen just as you did before. If you find their name on the list again, you will find that it has changed based on the completed edits.

If you click on the three dots again and select "delete", the system will prompt you to confirm. Please keep in mind that deleting is permanent and cannot be undone. Historical information will be maintained if it is deleted.

The list of Activity staff links to two places in NIRS. The first is the "Staff Involvement" field in the Activities Dataset. The second place is the "Author(s)" fields in the Products Dataset.

Click on the Activities Dataset and select "Add Activity" under the right column. Next to any core function, for example, "Technical Assistance", click "Add". You will see the "Staff Involvement" field near the top of the form. If you click into the drop-down box, it will show the list of names you just entered in the “Manage Activity Staff” in the Admin section of NIRS. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.

automatically enter the person's name, separated by semicolons, into the text box.

If you do not see a name on the list, you have two options:

1) Return to the Admin section, "Manage Activity Staff" and add the person to the list. This option will work if you are planning to reference the name multiple times, or

2) Click in the "Staff Involvement" text box and manually type in the person's name. This option will work for one-time collaborators.

Go to the Products Dataset, select "Add Product" in the sub menu, select any product material type, for example, "Academic Course Development", and click on "Add" next to it. You will find the "Author(s)" field close to the top of the form. You will find that the field functions in the same way as in the Activities Dataset. If you click on the drop-down menu and click on any name, you should click the blue button "Add this person" to add them to the text box. If you don't see the person on the list, you can also either add them to the Activity Staff list in the Admin section of NIRS or click into the text box and manually enter the person's name(s) separated by semi-colons.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

This product is provided in partial fulfillment of tasks outlined in contract #75P00121C00057 with the Administration for Community Living (ACL) and cooperative agreement #2A5MC11068-15-00 with the Maternal and Child Health Bureau (MCHB). The contents do not necessarily reflect the views or policies of ACL, MCHB, the Health Resources Services Administration, U.S. Department of Health and Human Services, or the U.S. Government.