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3.0 Network Member Directory - 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.

3.1 Overview of Directory Dataset

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules, titled "Overview of the Directory Dataset". In this video, we will discuss the overall purpose and structure of the Directory Dataset in NIRS.

Firstly, what is the Directory Dataset, and how does it connect with the Network Member directory?

The Directory Dataset contains the list of faculty/staff profiles who have participated in grant-related work at the Center or Program. Directory faculty/staff profiles are used to:

1. Reflect work efforts across a variety of Projects and Products at your Center or Program, and

2. Share expert information on the public-facing Network Member directory on AUCD's website. The Network Member directory on the AUCD website is used every day by stakeholders, policymakers, and the general public to identify expertise, research, and resources on a variety of disability-related topics.

The Network Member directory pulls information from faculty/staff profiles listed in the Directory Dataset in NIRS. It is the NIRS Administrator's

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responsibility to manage which profiles will be displayed in the Network Member directory. The Network Member directory will reflect changes when a profile in NIRS is updated.

There are two ways to manage profiles in the Network Member directory:

a) Faculty/staff member(s) can create a profile on the AUCD website and submit it for approval to a NIRS Administrator. The NIRS Administrator will make a final decision about the profile's display in the Network Member directory. If approved, Faculty/Staff can continue to manage their profile in the AUCD Network Member directory.

   This option is beneficial if you have many faculty or staff who need to update their directory information, as it allows them to make necessary edits themselves.

b) A NIRS Administrator can manage (add, edit, and delete) all faculty or staff profiles via the Directory Dataset in NIRS. NIRS Administrators also manage the display status of each profile in the Directory Dataset in NIRS.

   Please keep in mind that a NIRS Administrator with access to the Directory Dataset can manage all Network Member directory data for all faculty or staff profiles listed publicly or otherwise.

We will dive into each of the two methods in detail in the following sections of this module.

Centers or Programs are responsible for maintaining control of who has access and which faculty or staff are displayed publicly on the Network Member directory. Leadership Education in Neurodevelopmental Disabilities (LEND), University Centers for Excellence in Developmental Disabilities (UCEDD), and Intellectual and Developmental Disabilities Research Centers (IDDRC) training Programs have public-facing Network Member directory profiles. To ensure accurate and consistent information,

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it is advised to have a centralized NIRS Administrator who will manage faculty or staff profiles for the Network Member directory.

Please note that at the time of this recording, LEAH Programs do not have a public facing Network Member directory.

If you are a brand-new Center or Program, AUCD will create your NIRS Center/Program and a NIRS Administrator account with access to the Directory Dataset.

The Directory Dataset is only viewable to NIRS Administrators.

Before proceeding, you need to set up appropriate credentials to ensure that you can access the Directory Dataset.

- A NIRS Administrator should log into the NIRS application by going to aucd.org, clicking on the "About" Section and selecting "NIRS Login".

- Select your Center/Program from the drop-down menu and enter your username and password in the following two boxes.

To create credentials for a faculty or staff member to manage the Network Member directory, please follow these steps:

- First, a NIRS Administrator should go to the Admin section. Under the right-hand column, select "Manage NIRS Users Login". Find the faculty or staff person's name on the list.

- Click on the three dots next to their name and select "Edit" to update their credentials.

- Next to Access level, select "Admin" in the drop-down menu. Select the "Directory" checkbox for the "Datasets" field. Make sure that the "Directory Manager" checkbox is selected. Save the page.

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Now the NIRS user should log into the NIRS application. They will find that they have access to the Directory Dataset on the navigation menu.

Hover your cursor over the Directory Dataset to bring down a menu. It is organized similarly to other Datasets in NIRS. If you click on the Directory Dataset at the top of the page, you will see a drop-down with two columns. On the right side, you will see options to:

- add new profiles,
- manage existing profiles, and
- manage your Center or Program's address and contact information.

On the left side, you will see:

- a Directory Dashboard, which provides a summary of your Center/Program's contact information,
- Standard Reports, which contain pre-populated data that may answer commonly requested data queries.
- Custom Reports, which you could use to build custom queries for information that may not be included in Standard Reports.

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.

3.2 Introduction to Faculty or Staff Profiles and the Network Member Directory on the AUCD Website

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled "Introduction to faculty and staff profiles and the Network Member directory on the AUCD Website". This video will introduce the Network Member directory and walk through how faculty or staff profiles are structured on the AUCD website.

Please keep in mind that the AUCD Network Member directory serves multiple purposes, including helping potential collaborators find experts in the network. AUCD recommends that NIRS Administrator(s) direct faculty

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or staff to update their existing Network Member profiles at least once or twice a year, in early September and again in February. This will assist your Center or Program in keeping up-to-date with any changes in contact information.

To update their Network Member profile, faculty or staff should navigate to the AUCD website at aucd.org. Click on the "About" section and select "Network Members." From here, they should locate their Center/Program by using the search by state function or by clicking and dragging on the interactive page.

In our example, we will use Virgin Islands, UCEDD's Directory page to demonstrate how a faculty or staff person can manage their directory profile.

To locate the Virgin Islands, UCEDD directory page, you could use the search by state to find their Center. Select "Virgin Islands" from the "search by state" drop-down menu and click search.

At the top of the page, you will see the program type – in our case, the Virgin Islands is a UCEDD-only Center. You will also see the Center's name, the university, and contact information. In the top right-hand corner, you will find a direct link to email the Program and a link to their website. Under "Faculty & Staff", you can see the list of all faculty and staff for the selected Center. There is an option to download a .CVS file with their data from their public-facing Network Member directory page. Below that, there is also a link to submit a new faculty or staff profile.

You will notice that faculty or staff positions are split up by areas of expertise and position in their Center or Program. This is to provide ease in locating staff by leadership, administrative staff, activity coordinators, and discipline. The faculty or staff person's position, name, primary discipline, and email are listed.

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For our example, we will click on the Directory profile of Assistant Director Sharon Williams. If you click on the name of a faculty or staff person, you can read more about them, such as all the positions that they hold in their Center or Program, their biography, research interests, and so on. On the right-hand side, you can also see specific Projects and Products that they are engaged in.

Just underneath her name at the top of the page, you will see an option to "Login to Update Your Profile" where Sharon could log into her profile and update it.

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.

3.3 Adding New Directory Profiles via the AUCD Website

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled “Adding new directory profiles via the AUCD Website”. This video will demonstrate how new faculty or staff can create a profile for the Network Member directory via the AUCD website and how to edit existing profiles.

When a new faculty or staff person is hired, they should create their own Directory profile. To do so, they should navigate to the AUCD website at aucd.org. Click on the "About" section and select "Network Members." From here, they should locate their Center/Program by using the search function or by using the interactive map.

From this page, under "Faculty & Staff”, there is an option "Not yet in the directory? Register to manage your profile online". Clicking on this link will take you to a page to fill out your information.

At the top of the form, you will see two options to save your work:

1. "Save and Submit", which you should select once you have finished filling out all fields, and you are ready to submit your profile. After

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clicking 'save and submit', you will not be able to edit your profile until the NIRS Administrator approves it.

2. "Save for Later Completion," which you can select if you need to return and finish the form later.

Please keep in mind that some fields are required on the page. Required fields are indicated with an asterisk (*).

The directory profile submission form contains the following:

- In the first section "Individual Profile", you can provide your name, degree, and select the Center or Program that you work at.
    - For your phone number and email, please provide your professional contact information as they will be listed publicly.
    - When entering your username and password, please provide a combination of letters, numbers, and symbols with at least six (6) characters in length. It is NOT case sensitive.
- In the second section on "Work Address", please provide the address of your Center or Program. You may also provide an address of a location that is different, for example, if you work at a clinic that is separate.
- For the next section on "Additional Information", you can enter information about your position and professional achievements. This section is similar to information provided on a professional "LinkedIn" profile.
    - Select any position(s) that you hold. At least one selection is required across the "Leadership", "Administrative Staff", "Primary Activity Coordinator", and "Disciplinary Coordinators" fields.

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- Next, you can type in any Specialty or Project/Program/Clinic positions if not listed in the above fields.

- Next, you should also select a "Primary Discipline" from the drop-down box.

- There is also an option for "Other" if the desired option is not provided. A text box is found farther down the form if "Other" is selected. Additional selections may be made if desired or if you have multiple areas of study.

- In the next four text boxes, you should enter your research, education, service accomplishments, and a vita or bio. A list of keywords is preferred, as each of these text boxes is limited to 200 words or less.

- You may also upload a headshot or photograph of yourself. Please ensure that only yourself is included in the photograph. Please keep in mind that all fields in this section are publicly viewable. It is up to your discretion what you publicly list in these fields.

- In the final section, please note that none of the fields are listed publicly.
  - Indicate if you were a former trainee at a LEND, LEAH, or DBP training Program. There is another checkbox if you are a former UCEDD trainee. If you are not a former trainee, please select "None of the above".

  - Provide your gender, language proficiency, year of birth, year hired at your Center/Program, and race/ethnicity. Definitions are provided where applicable.

  - In the final question, please provide your relationship to disabilities.

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Once you are satisfied with your selections, save and submit the profile.

Responses are not automatically approved or made public. Each Center or Program is responsible for conducting an administrative review of all faculty and staff profiles submitted through the AUCD website. Only NIRS Administrators with access to manage the Directory Dataset can review submissions and assign their display status.

If the NIRS Administrator approves the profile for display in the AUCD Network Member directory, the faculty/staff member can update it. Updates will be shared with the NIRS Administrator through email.

The process for updating a faculty or staff profile on the AUCD website is as follows:

1. First, locate your Network Member directory page.

2. Then, find your name on the list of faculty or staff profiles.

3. You can click on the link just below your name "Login to Update Your Profile". This will take you to a page to enter your username and password.

   If the faculty/staff profile is approved for display in the AUCD Network Member directory, it doesn't mean that they have access to NIRS data. NIRS and the AUCD Network Member directory are two different systems and do not share login credentials.

   If you forgot your password for the Network Member profile, you could use the "Forgot your password" feature, enter your profile email in the space provided, and follow the prompt sent to the email on file.

   If you are still unable to log in, please reach out to a NIRS Administrator at your Center or Program. They can assist you with recovering your username and password.

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If you do not know who is a NIRS Administrator is at your Center or Program, please message NIRS@aucd.org, and we will connect you with the correct person.

4. Once you are logged in, you will be brought to a form where you can update your directory profile information. Once you are happy with your selections, save the page.

Please keep in mind that an administrative approval process is required for directory profiles that are submitted.

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.

3.4 Managing Directory Profiles via NIRS and Administrative Process for Approving Profiles by NIRS Administrator

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled “Managing directory profiles via NIRS and administrative process for approving profiles by NIRS Administrators”. This video will discuss how a NIRS Administrator can manage all faculty and staff profiles via the Directory Dataset in NIRS and the administrative approval process needed to approve profiles submitted through the Network Member directory on the AUCD website.

NIRS Administrators with access to the Directory Dataset that are "Directory Managers" can view and manage information for all faculty and staff profiles on the public-facing AUCD Network Member directory.

To view existing faculty or staff profiles, click on the Directory Dataset and select "Manage Faculty | Staff Profiles". From this screen, you will note that you can access a search function in the top right-hand corner. You will also find a data dictionary, which will open a pop-up window. This is a helpful

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resource for clarifying the definition of fields and form options. It also lists if a field is publicly viewable.

Going on down the page, you will see:

- the person's name,
- their account details (email, username, and password), which will be helpful if asked about a forgotten password,
- a status option that controls how their profile is listed publicly and in the other Datasets in NIRS,
- a toggle to include their profile in the Electronic Handbook or EHB to the Maternal and Child Health Bureau or MCHB, and
- the date that the profile was last updated.
- In the last column, you will find a toggle where you can select individual faculty or staff in the list and email them a reminder to update their profile.

Click on the three dots under the "Manage" column next to a faculty or staff person's name. The list of options in the menu will vary if the faculty or staff profiles are linked with federal reporting in the Projects Dataset and Products Dataset. You may see two options:

1. If the faculty or staff profile is linked with Project or Product records linked in federal reporting, you will see options to:
   i. "Edit" to update the responses in the profile,
   ii. "View Linked Product and Projects" to review records attached to the faculty or staff person's profile, and
   iii. "View" to see a version of their profile that can't be edited.

   Please note that profiles linked to Project or Product records cannot be deleted. This is because prior-year records are locked for editing, and those profiles remain associated with those records.

2. If the faculty or staff profile is NOT linked with Project or Product records linked with federal reporting, you will see options to:
   i. "Edit" to update the responses in the profile,

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ii. "View" to see a version of their profile that can't be edited, and
iii. "Delete". If you select "delete", the system will prompt you to confirm. Please keep in mind that deleting a profile is final and cannot be undone.

To update an existing profile, you should select the "Edit" option. This will take you to a form where you can edit existing responses in the faculty or staff person's profile. There are fields that are accessible to Faculty/Staff through the AUCD Network Member directory, but there are fields that exist only in the NIRS Directory Dataset.

- In the first section, there are options to update the person's name, degree, contact information, and username and password. You will also see an option to update the person's work address. You should select the check box if their work address provided is not the same as the one provided, which will allow you to enter a new work address.

- The second section will include the person's position split into leadership, administrative staff, primary activity coordinators, and disciplinary coordinators. At least one option must be provided across the four position categories. You will also find an option to enter specialty positions or Project/Program/Clinic contact positions. Multiple positions may be provided, though each new position should be entered on a separate line. There is an option to update the faculty or staff person's discipline. A "primary Discipline" must be provided from the drop-down menu, though additional disciplines may be provided.

- You may also review the person's research, education, and service accomplishments. There is another field for a vita or biography. You should ensure that a list of keywords is provided and separated by commas. Each field is limited to 200 words or less.

- A photograph may also be uploaded. The picture should be no more than 250 pixels wide by 300 pixels high. Please be aware all fields in

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the second section are posted publicly.

- In the third section, no fields will be posted publicly. There is an option to update the person's former trainee status. If faculty/staff are former LEND, LEAH, or DBP trainees, the first option for "Former MCHB-program trainee" should be selected. If they were a former UCEDD trainee, the second option can be chosen.

- There are also options for gender, language proficiency, birth year, year hired at the Center or Program, race and ethnicity, primary employment role, and personal relationship to disabilities.

- In the final section on Administrative fields, you will see the faculty or staff person's program affiliation. Please keep in mind that if you are a co-located UCEDD + LEND program, you will see check marks for both program types, and you should ensure that the correct check marks are selected. Otherwise, this field will be automatically provided.

- The "status" option determines how a faculty or staff member is displayed both publicly and within the Projects and Products Datasets. The "status" option also reflects 1) the profile's status in the Directory Dataset in NIRS, and 2) its visibility in the AUCD Network Member directory on the AUCD website.

Now let's go through the "status" options and how each of them impacts the directory and data listed in other Datasets in NIRS.

The status option controls how the faculty/staff profile is listed on the public facing AUCD Online Directory and in the Projects ('Contacts' list field) and Products Datasets ('Ordering Information Name' field). Different status options and their effects are listed below:

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- **Display:** The profile is approved and displayed in the AUCD Network Member directory. The profile is available in the "Contacts" list in the Projects and "Ordering Information Name" field in the Products Dataset.

- **Do not display:** The profile has been approved and will not be displayed in the AUCD Network Member directory, but it is still accessible in the "Contacts" list in the Projects and “Ordering Information Name” field in the Products Dataset.

- **Inactive:** The profile is approved but will not be displayed on the AUCD Network Member directory or in the “Contacts” list in the Projects and "Ordering Information Name" field in the Products Dataset.

A manual administrative review process is required when a profile is submitted through the AUCD Network Member directory by faculty/staff:

- **Pending Submission** – the faculty/staff person is in the process of submitting a profile through the AUCD Network Member directory; This means that the profile is not available publicly on the AUCD Network Member directory, in the "Contacts" list in the Projects, or "Ordering Information Name" field in the Products Dataset.

- **Waiting for Approval** – the faculty/staff person submitted the profile, and it's waiting for a NIRS Administrator to review it. This means that it is NOT displayed in the AUCD Network Member directory, and the profile is NOT available in the Projects and Products Datasets.

- **Rejected:** The profile is not accepted by the Center and will not be displayed in any of the three locations (AUCD Network Member directory, Projects and Products Datasets).

To complete an administrative review of a profile with the "Waiting" status option, you should:

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1) Locate the faculty or staff profile on the "Manage Faculty | Staff Profiles" page in the Directory Dataset.

2) Click on the three dots next to their name and select "edit". You should then review selections and check for grammar and that the appropriate selections were made. Please pay special attention to any uploaded photos and links provided in text boxes. You will need to determine if they are appropriate for a professional profile.

3) Once you have finished your review, you should update the "status" option at the bottom of the form under the "Administrative Fields" section. The field is called "Member status in online Directory".

4) Once you are happy with the updates, save the record at the bottom of the page. There is also an option to "Cancel" any changes that were made without saving.

5) Save the page to return to the "Manage Faculty | Staff Profiles" page. You may also update the "status" option by clicking on the "status" drop-down menu from this screen as well.

That's all that you need to do. If you have updated the "Status" option to "Display" you may go to your Network Member page on the AUCD website to see that the faculty or staff member's profile has been posted publicly.

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.

3.5 Adding New Directory Profiles via NIRS

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled “Adding new directory profiles via NIRS”. This video will demonstrate adding new faculty and staff profiles in NIRS by

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the NIRS Administrator who has permission to manage the Directory Dataset in NIRS.

Creating a Network Member profile via NIRS may be a beneficial option as opposed to asking the new faculty or staff member to submit a profile via the website if you have a centralized point of contact for the Network Member directory or if it would be easier for someone else to enter their profile information. This method also integrates the administrative approval process while filling out the profile.

To create a new faculty or staff profile directly in NIRS, you should log into the NIRS application. Once you are logged in, click on the Directory Dataset and select "Add Faculty | Staff Profile". This will bring up an empty directory form, which should be filled out.

Required fields are indicated with an asterisk (*), and once all required fields are completed, you may save the form. You could access the data dictionary in the upper right-hand corner of the form. A link to the data dictionary will bring up a pop-up window. The data dictionary is a great resource that provides definitions for all fields, and it is updated annually. It will also include details on whether the field is publicly viewable or not.

Please note that it is up to each Center or Program to decide what they post publicly on their Network Member directory page. Your Network Member directory should be treated like a professional social media platform, similar to LinkedIn.

For example, when listing contact information, keep in mind that phone number(s) or email address(es) will be publicly visible and may be used by policymakers or collaborators to contact your Center or Program. Therefore, it is recommended to provide contact details associated with your place of employment. The same guidance applies when including alternate email address(es) or link(s) to external website(s). NIRS Administrators should ensure they appropriately represent your Center or Program.

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Once you are happy with the selections on the form, you will come to the final section on "Administrative fields" at the bottom of the page.

The status option controls how the faculty/staff profile is listed on the public facing AUCD Online Directory and in the Projects ('Contacts' list field) and Products Datasets ('Ordering Information Name' field). Different status options and their effects are listed below:

- **Display:** The profile is approved and displayed in the AUCD Network Member directory. The profile is available in the "Contacts" list in the Projects and "Ordering Information Name" field in the Products Dataset.

- **Do not display:** The profile has been approved and will not be displayed in the AUCD Network Member directory, but it is still accessible in the "Contacts" list in the Projects and "Ordering Information Name" field in the Products Dataset.

- **Inactive:** The profile is approved but will not be displayed on the AUCD Network Member directory or in the “Contacts” list in the Projects and "Ordering Information Name" field in the Products Dataset.

A manual administrative review process is required when a profile is submitted through the AUCD Network Member directory by faculty/staff:

- **Pending Submission** – the faculty/staff person is in the process of submitting a profile through the AUCD Network Member directory. This means that the profile is not available publicly on the AUCD Network Member directory, in the "Contacts" list in the Projects, or "Ordering Information Name" field in the Products Dataset.

- **Waiting for Approval** – the faculty/staff person submitted the profile, and it's waiting for a NIRS Administrator to review it. This means that

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it is NOT displayed in the AUCD Network Member directory, and the profile is NOT available in the Projects and Products Datasets.

- **Rejected:** The profile is not accepted by the Center and will not be displayed in any of the three locations (AUCD Network Member directory, Projects and Products Datasets).

Once the form has been saved, you will see the person's name listed in the Directory Dataset > "Manage Faculty | Staff Profiles".

To review the two fields where the Network Member profile connects via the Projects and Products Datasets, you can view them by going to the respective Dataset.

In the Projects Dataset, click on "Add Project". The "Contact" field is a drop-down box, just below the "Project Description" field near the top of the page. In the Projects Dataset, the contact of the project is typically a faculty or staff member who oversees the funding initiative. When you click the drop-down box, you will see a list of names, that can be found in Directory Dataset in NIRS, along with their display status in the Network Member directory.

Similarly, in the Products Dataset, you should select "Add Product". Next to any of the product material types, you can select the "Add" button to enter the Product form. At the bottom of the page, there is a section for the "Ordering information" if a collaborator needs to request a copy of the deliverable. In the "Name" drop-down box, you will see a familiar list of names as well as the status in the Network Member directory.

Projects and Products linked to the faculty/staff profile will be displayed on their profile page on the AUCD website, Network Member Directory, in the right-hand column.

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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.

3.6 Managing Connections Between Faculty/Staff Profiles and Projects/Product Records

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled “Managing connections between faculty/staff profiles and projects/product records”. This video will discuss the connections between faculty and staff profiles and the Projects Dataset in the “Contacts” list field and Products Datasets in the “Ordering Information Name” field and how to manage them.

There are two major reasons you may wish to update the connection between profile(s) and project and/or product records.

1. The faculty or staff member no longer works at your Center or Program, and their ongoing Projects have transitioned to a new faculty or staff member.

2. Your Center or Program has elected to remove retired faculty or staff profiles from NIRS. The end goal in this scenario would be to delete the faculty or staff person's profile, which is permanent.

As a safeguard, NIRS has a feature that prevents the deletion of faculty or staff profiles that are linked with Projects and Products. However, Centers/Programs want to have faculty/staff connected to projects/products who can be reachable and who are employed by your Center/Program. For that reason, NIRS has a process to remove the linkage and transition Project and Product records from one faculty or staff member to another.

Navigate to the Directory Dataset “Manage Faculty | Staff Profiles”. Click on the three dots under the "Manage" column next to a faculty or staff person's name. You may see two options:

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1. If the faculty or staff profile is linked with Project or Product records linked in federal reporting, you will see options to:
   i. "Edit" to update the responses in the profile,
   ii. "View Linked Product and Projects" to review records attached to the faculty or staff person's profile, and
   iii. "View" to see a version of their profile that can't be edited.

Please note that profiles linked to Project or Product records cannot be deleted. This is because prior-year records are locked for editing, and those profiles remain associated with those records.

2. If the faculty or staff profile is NOT linked with Project or Product records linked with federal reporting, you will see options to:
   i. "Edit" to update the responses in the profile,
   ii. "View" to see a version of their profile that can't be edited, and
   iii. "Delete". If you select "delete", the system will prompt you to confirm. Please keep in mind that deleting a profile is final and cannot be undone.

For a faculty or staff profile that is linked with Project or Product records, you should select the option "View Linked Product and Projects". This option will allow us to transition Project and Product records from one faculty or staff profile to another.

On the next page, you will see a list of all Projects and Product records linked with that person's profile. Each record is highlighted in blue. If you click on the hyperlink, you will see a drop-down menu to select a new faculty or staff person.

The names provided also match those listed in the Directory Dataset. To transfer a record to another faculty or staff member, they must have a Network Member profile. If you do not see the desired person's name in the drop-down menu, a profile must be created in the Network Member directory first.

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Once you select a person's name from the drop-down box, save the page. You must complete this process manually for each record listed on the "View Linked Product and Projects" page.

If your goal is to transition a few ongoing Projects to another faculty or staff member, then continue to repeat the same process until all records have been transitioned to another staff person.

If you want to delete the faculty/staff person's profile, all Project and Product records must be transitioned to another faculty or staff member. You should repeat the same steps that we just covered until all records are transferred to another faculty/staff profile. Once all records have been transitioned, return to the Directory Dataset and select "Manage Faculty | Staff Profiles". Find the staff person's name that you are planning to delete from the profiles listed. Click on the three dots under the "Manage" column next to their name.

If all records have been successfully transitioned, you will notice that the options have now changed to "Edit", "View", and "Delete". To delete the profile, select "Delete". The NIRS application will ask you to confirm. Deleting a profile is final and cannot be undone.

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3.7 Overview of Standard Reports in the Directory Dataset

Welcome to the video of the "Network Member Directory" section of the NIRS Learning Modules titled “Overview of Standard Reports in the Directory Dataset”. This video will discuss the purpose of Standard Reports in the Directory Dataset.

NIRS has many helpful tools to assist you in answering a variety of questions. Standard Reports in the Directory Dataset contain pre-populated reports that summarize data entered in the Directory Dataset in NIRS.

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To access the reports, you need to have access as an NIRS Administrator with "Directory Manager" permissions. In the Directory Dataset, Select "Standard Reports" in the navigation menu in the right-hand column.

From this page, you will see that a search function is available at the top of the page. The data dictionary is also available on this page. A list of reports, which you can run to view the data, is also accessible from this page. In the upper left-hand corner, you will also see the program type listed. For LEND-only, UCEDD-only, DBP, and LEAH Programs, this option will be automatically provided for you.

If you are a co-located UCEDD + LEND Center/Program you will also find a toggle to search by UCEDD-only, LEND-only, and combined by clicking both checkboxes. This option will allow you to search specific faculty or staff across your UCEDD and/or LEND.

Examples of Standard Reports for the Directory Dataset include reports on:

- Faculty and Staff Information for MCH Reporting. If you run this report, it will list faulty by faculty or staff type, their name, race, ethnicity, gender, discipline, if the faculty or staff member was a LEND, LEAH, or DBP former trainee, year hired, and status on the directory.

  It is important to note that all data results of Standard Reports can be copied + pasted into an Excel sheet. To do so, follow these steps:

  1) Press CTRL + A to select all of the data on the page that displays report results.

  2) Press CTRL + C to copy all of the data.

  3) Open up an Excel spreadsheet and click on cell 1A. Press CTRL + V to paste the text into the Excel sheet.

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4) You may wish to remove formatting by going to the home tab, under "styles" and selecting the Cell Style "Normal". You can also remove hyperlinks by right-clicking the pasted content and selecting "remove hyperlinks". I also prefer to remove the top two rows in the spreadsheet as well, so that I can filter by field headers or upload it into an analytical software such as REDCap, SAS, SPSS, STATA, or R.

Other Standard Report examples include:

- Staff by Race and Ethnicity
- Staff by Gender
- Staff Age and Years of Service which lists the mean age of staff and mean years of service and response rate to those questions in Network Member profiles
- Staff Personal Relationship with Disabilities
- Staff Discipline which provides the number of faculty or staff within each discipline category
- Staff Expertise which lists each faculty or staff person's discipline, research, education, and service details listed in their profile.
- There is also a Data Entry Error report which will be helpful to data coordinators who are reviewing and cleaning the faculty or staff profiles. The Data Entry Error report will list the profile and all fields which are missing or that have an error in the field. NIRS Administrators could run the report and correct the error messages by editing profiles in the Directory Dataset "Manage Faculty | Staff Profile" page to correct the errors listed in the report.

You can explore the Standard Reports by clicking on each of them.

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