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4.0 Trainees Dataset - 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.

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.

4.1 Overview of Trainees Dataset

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules, titled "Overview of the Trainees Dataset". This video will discuss the background, overall purposes, and structure of the Trainees Dataset in NIRS and the three types of trainees.

Firstly, what is the Trainees Dataset, and what kind of data is recorded in it?

The Trainees Dataset is designed to capture the demographic and contact information of individuals enrolled in Centers and Programs. The information captured in the Trainees Dataset is used to produce aggregate demographic information on trainees, track the progress and impact of an individual's training, and manage follow-up surveys from former trainees. The information in this Dataset, aggregated across the AUCD Network, provides a snapshot of the size and demographics of the Network's trainees annually.

The Trainees Dataset enables Centers and Programs to create and manage multi-year records for all trainees.

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Each trainee record consists of three parts:

1. A Main Record for the trainee,
2. An Annual Record for each fiscal year a trainee is enrolled in the training Program, and
3. Follow-Up surveys completed by the trainee.

1) A Main record for the trainee.

   The Main record contains information about the trainee that is unlikely to change, such as demographics, position at admission in the Program, and permanent address. Information entered into a Trainee's Main Record is vital to completing Former Trainee Surveys, as it contains their contact information.

2) an Annual record for each fiscal year a trainee is enrolled in the training Program,

   The Annual record primarily contains information specific to a training experience each year a trainee is enrolled in the Program. Information in the Annual Record will likely change yearly, such as hours completed, funding sources and amounts, enrollment status, and products developed as part of community or leadership projects.

3) Former Trainee Follow-Up Surveys completed by the trainee.

   Former Trainee Follow-Up Surveys are securely stored and linked to the Trainee's Main Record. The surveys contain information geared towards showing the impact of training, such as achievements since graduating from the Program, input on topics beneficial to future trainees, and more.

NIRS resources helpful to the Surveying Former Trainees can be accessed from AUCD.org, by clicking on “NIRS” highlighted in white under the “About” section. On the right-hand side of the screen, click “NIRS

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Resources for OIDD-funded Programs". Next, click on "Training Courses, Demos, Tip Sheets". You will find the "Guidebook on Surveying Former Trainees" on the page, which details the process for how to track trainee alumni through the former trainee survey after the trainee has graduated from your training Program.

Now that we have discussed the general purposes of the Trainees Dataset, let's move on to the NIRS application and discuss the structure of the Trainees Dataset.

Please note that 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 Trainees Dataset.

The Trainees Dataset is only viewable to users who have appropriate access and login credentials with appropriate access in the NIRS application.

To grant access to the Trainees Dataset, a NIRS Administrator from your Center/Program should follow these instructions:

1) Log in to the NIRS application by going to aucd.org, clicking on the "About" Section and select "NIRS Login".

2) i) Select the proper login page for your Center/Program type.
   ii) Then, select your Center/Program from the drop-down menu and enter your username and password to log in to the NIRS application.

3) Navigate to the "Manage NIRS Users Profiles" screen in the Admin section. Find the person on the list and click on the three dots next to their name. Select "Edit" to update their credentials.

4) Select the "Trainees" checkbox for the "Datasets" field. Save the page.

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Now the NIRS user will find that they have access to the Trainees Dataset on the navigation menu.

Hover the cursor over the Trainees Dataset to bring down a menu. It is organized similarly to other Datasets in NIRS. If you click on the Trainees Dataset at the top of the page, you will see a drop-down with two columns. On the left side, you will find a group of links for “Manage Dataset” and on the right, a group of links to browse your data in the Trainee Dataset, “View data.”
On the left side, you will see options to:

- Add new Trainee Main and Annual Records for long and Medium/Intermediate trainees,
- Add new Short-term records for trainees
- Manage existing Trainee Main and Annual Records for Long and Medium/Intermediate trainees,
- Manage existing Short-term records for trainees, and
- A template manager for a quick email tool in the Trainees Dataset in NIRS.

On the right side, you will see:

- Standard Reports, which contain pre-populated data that may answer commonly requested queries.
- Custom Reports, which you could use to build custom queries for information that may not be included in Standard Reports.
- The List Survey, which contains all completed former trainee surveys submitted by trainee alumni, and
- An Advanced Search function which allows you to quickly and easily search for trainee records in specific year(s) or trainees with a specific discipline.

Additionally, the following tools are available at the top right-hand corner of each page in the Trainees Dataset:

- Data Dictionary, which is a valuable resource that includes definitions for each field on the Trainees Dataset forms.

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- Survey Instructions, which includes instructions on surveying former trainees,
- Advanced Search, which allows you to search across all trainee records submitted to the Trainees Dataset.

What does a long-, medium/intermediate, and short-term trainee mean, and what is the difference?

Trainees are categorized based on the number of contact hours they participate in your training Program during the reporting period:

- Long-term trainees are engaged for 300 hours or more,
- Medium/Intermediate-term trainees are engaged for 40 to 299 hours, and
- Short-term trainees are engaged for less than 40 hours

Understanding the distinction between each type of trainee is essential, as this is one of the first decisions you'll make when entering trainees into the Trainees Dataset. We will discuss this topic next.

UCEDD trainees reported to ACL are Short-, Intermediate-, and Long-term Trainees who are participating in a UCEDD interdisciplinary or discipline-specific training Program.

UCEDD trainees may engage in your training Programs in a variety of different ways. For example, they can engage through interdisciplinary training Programs as a trainee, or for continuing education purposes, community training, and other areas.

Let’s discuss each of the ways that trainees may engage in your UCEDD.

- Interdisciplinary Preservice Preparation (or training trainees) is defined as an instructional program offered by the UCEDD that:

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1. Integrates knowledge and methods from two or more distinct disciplines.
2. Integrates direct contributions to the field made by people with disabilities and family members.
3. Examines and advances professional practice, scholarship, and policy that impacts the lives of people with developmental and other disabilities and their families.
4. Is designed to advance an individual's academic or professional credentials.
5. Takes place in an academic setting or program.

Interdisciplinary preservice preparation may:

1. Lead to the award of an initial academic degree, professional certificate, or advanced academic credential, **and**
2. Contribute to a discipline-specific course of study offered by the UCEDD or another academic department.

UCEDDs are expected to report annually to ACL on current trainees enrolled in their Program for the current fiscal year and the impact of training in the UCEDD PPR Part 2: Core function Interdisciplinary Preservice Preparation. UCEDDs will also report annually to ACL on Former Trainee Surveys in the UCEDD PPR Part 4 on UCEDD Government Performance and Results Act (GPRA) measures, which included data collected from Former Trainee Surveys.

Other types of training provided through the UCEDD may be defined as Continuing Education or Community Training (defined below), which are best captured in the Activities Dataset. Such training data will be reported to OIDD/ACL in their Annual Program Performance Report under the appropriate core function.

- Continuing Education is defined as seminar(s) or courses of instruction offered by a UCEDD that:
  1. Serve to maintain professional credentials.

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2. Encourage professionals to expand their knowledge base and stay up-to-date on new developments.
3. Offer certificates of completion or CEUs (or their equivalents).

- Community service training is defined as training provided by UCEDD faculty/staff to enhance knowledge of various community members, such as individuals with developmental and other disabilities, their families, professionals, paraprofessionals, policy makers, students, or others in the community).

  Community services provide education, support(s), and activities that help communities to be responsive to the needs of people with developmental disabilities (DD) and their families. These services promote active participation in community life and are delivered in community-based settings rather than academic or clinical environments. Community services also aim to ensure fair access to services, individualized support(s), and other assistance for people with developmental disabilities and families from underserved communities.

- Other Trainees

Other trainees may also be captured in NIRS. Center and Programs may, but are not required to, enter records for their other trainees, including individuals who receive systematic, continuous, interdisciplinary training in a broad range of professional functions or supervised training, service, and/or research skills.

Now let's discuss LEND, LEAH, and DBP trainees.

Please note that LEND, LEAH, and DBP training Programs reporting to MCHB have additional training requirements beyond the number of hours that they are engaged in your training Program. These may include didactic and experiential training requirements.

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Because these requirements vary by Program, it is important to:

- Consult your Project Director and/or Project Officer at MCHB, and
- Review your Program's specific Notice of Funding Opportunity (NOFO)

Each MCHB-funded Program, that is, LEND, LEAH, and DBP training Programs, have its own Notice of Funding Opportunity that outlines Program-specific training requirements for trainees. UCEDD Centers reporting to ACL also have a Notice of Funding Opportunity outlining similar requirements.

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.

4.2 Adding New Long/Medium-term Trainee Records

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled "Adding New Long/Medium-term Trainee Records". This video will demonstrate creating a new long- or medium/intermediate-term trainee record.

NIRS users with access to the Trainees Dataset have access to add and manage trainee records. If you have access to the Trainees Dataset, you will see that it is viewable in the navigation menu at the top of the page when logged into NIRS.

Before getting started, you need to determine whether the trainee is a long, medium/intermediate, or a short-term trainee.

Long-term trainees are individuals with greater than or equal to 300 contact hours within the training Program in the reporting period.

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Intermediate-term/Medium-term Trainees are individuals with 40 or more, but less than 300 contact hours with the training Program.

A Short-term trainee is an individual who receives less than 40 hours of training.

For the purposes of this training, you will enter a record for a long- or medium/intermediate-term trainee.

To avoid accidentally creating a duplicate trainee record, be sure to use an advanced search to check if the trainee is already in the system. In the Trainees Dataset, select “Advanced Search” from the navigation menu.

- Next to "Fiscal Year(s)," select the "x" to clear all selections.
- Select "All Years" from the fiscal year drop-down menu.
- For “Trainee Type”, search for “Long/Medium term” trainees.
- In the selection criteria, select "TRAINEE Last name (T)" in the first drop-down menu, "like" in the second drop-down menu to search regardless of spelling, and then type in the trainee's last name in the third box.

There are two outcomes:

1) There is no trainee record with that name.
   In this scenario, you should create a new trainee record with a new main + annual record pair.

2) You found a trainee in the system.
   In this scenario, you should add an annual record to an existing trainee's main record.

This video will cover the scenario of creating a brand new trainee record.

To add a new main + annual record pair for a trainee, click on the Trainee’s Dataset and select “Add Long/med term trainee” from the navigation bar.

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This will take you to the online form to enter their data. At the top of the page, you will see the:

- Advanced Search, to search for records across the Trainees Dataset,
- Survey Instructions, which will be useful when we discuss about former trainee surveys, and
- The Data Dictionary. This resource provides a wealth of knowledge on data entry in all areas of the Trainees Dataset and definitions for all fields.

The Trainee's Dataset has two forms when you create a new trainee record. You will be asked to complete both forms for each trainee:

- their main record, which contains information least likely to change such as their name, contact information, and demographics, and then
- the annual record, which contains information about their training experience, such as discipline, contact hours, and stipend.

Let's go through each form together.
Required fields are indicated with an asterisk (*) next to the field and must be completed before you can save the form.

Please note that the contact information collected in these fields is for Program and Center use only and is not used by the federal government to contact trainees directly. For example, within MCHB reporting, a personal email address serves only as a unique identifier to distinguish records, not as a method for federal outreach.

In the trainee main record form, you will be asked to provide information on the trainee's:

- First and last name, which are required,
- Middle name or any former name(s), which are optional,
- Their highest level of education or credential(s) received, which is required. There is an option for "Other" and a text box to provide further details,
- Full current address, which is required,

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- Primary email address, which is required. Keep in mind that many university emails will no longer be active after the trainee graduates from the university. You may also use their email to contact trainees about surveys after they graduate from your training Program.
- An alternate email address and phone number for contact purposes.
- The address and contact information for an emergency contact person or a close relative/friend who will know how to contact the trainee. This is optional.
- If the trainee is a first-generation college student, meaning that their parents did not attend school beyond high school. There is option to "choose not to disclose" if they choose not to answer. This is required.
- Race, ethnicity, and gender, which are required. There is an option for each of these fields to "Choose not to disclose" if desired.
- The trainee's language proficiency, which is optional.
- The "Position Setting of Trainee at Admission" field refers to the setting that the trainee worked in professionally upon being accepted into the Training Program. For example, if the trainee worked as a teacher in a school, you could type "School". The field is required.
- The "Position Title at Admission" field refers to their professional title at their place of employment upon being accepted into your training Program. The field is required.

  You may also find the definitions for each field in the data dictionary.

- You should also indicate their personal relationship to disabilities, such as if they are a person with a disability, or a family member of a person with a disability. You should select all applicable options. The field is required.
- The last two fields can be left blank as they are filled out during the annual contact update.

Remember that the more complete and accurate the information is in the trainee's main record, the easier it will be to contact them after they have

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graduated from your training Program.

Once you are happy with the selections, save the form.

This will take you to the annual record form to fill out the data relevant to their training experience.

Let's go through the annual record form together.
As with the trainee main record, required fields are indicated with an asterisk (*) next to them.

In the trainee's annual record, you will be asked about the trainee's:

- "Fiscal Year" in which the trainee will be reported. It is a required field. This refers to the time frame of July 1 to June 30 of each year. This field will default to the current year of data collection. In this case, it is FY 2026. You can click on the drop-down box to select the applicable year.
- "Academic level", or the academic degree that they are working towards. For example, if they are currently enrolled in a master's degree program, you would indicate that they are a master's degree student. There is also an option for "Non-degree Seeking" if they are not enrolled in an academic degree program.

  Please note that medical students should be designated as "Doctoral". Medical residents and fellows should be designated as "Post-Doctoral". It is a required field.
- The "Position in Program" field is the trainee's role in the training Program within the specific year. For example, if the trainee is a self-advocate psychology fellow, resident, or intern. The field "Position in Program" captures the trainee's role in the Program yearly rather than their primary occupation upon entering the Program. The field is optional.
- The trainee's discipline, which is required. There is also an "Other" option and a text box to provide additional details.

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- The number of contact hours that they are engaged in your training Program for the current year of data collection, between July 1 and June 30 of each year. The field is required.
- The enrollment status, that is their status as a student based on the number of credits that they are enrolled in their academic Program. For example, if a master's student was enrolled in 6 credit hours or two academic courses during the semester, they would be considered part-time.

  Typically, at least nine (9) credits in a graduate-level academic Program are considered full-time, while twelve (12) or more credits are considered full-time for an undergraduate academic program. The field is required.
- Enter the trainee's start and end dates based on their program enrollment and completion dates.
  These dates must include at least part of the current data collection year. For example, a trainee who enrolled in May 2025 and completed the program in November 2025 would have both dates entered. This is a required field.
- You should also indicate if the trainee is a UCEDD trainee or LEND, LEAH, or DBP trainee. This information will inform which survey they should be sent and which federal partner they will be reported to. It is a required field.
- For LEND, LEAH, and DBP trainees, you should also indicate if they received any financial support. Additional questions will be asked further down if you select "YES", such as the amount they received, the type of funding, such as tuition or stipend, and the source of the funding.
- The field "Upon completing their training, will the trainee qualify as a" is the toggle for if they will be considered a long or medium/intermediate-term trainee.

  Be sure to select the applicable option here as former trainee survey reminders in Standard Reports will be based on the selections in this

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field.

Programs should consult with their Training Director and the Program-specific Notice of Funding Opportunity (NOFO), which outlines the requirements for what is considered a trainee and whether they should be considered a long-term trainee with 300 or more contact hours upon completing their training Program or a medium/intermediate-term trainee with 40-299 contact hours upon program completion. It is a required field.

- Next, you can attach existing Product records/deliverables as they are entered into the Products Dataset. This field is intended to assist with indicating anything that the trainee has created as part of the training Program.

  Note that a product record must first be entered in the Products Dataset for the record to appear in the drop-down box. We will cover how to enter records into the Products Dataset in a future module. The field is optional.
- You may also manually enter presentations by the student during the training year. You will need to supply the Presentation Name, date of the presentation, and venue in the fields provided. You may select the “Add More” button highlighted in blue to add additional presentations. The field is optional.
- In the last two optional fields, you will be asked about the trainee’s participation type, such as if they are involved in training didactics, research at your Center/Program, or practicum/field work. There is also an option for “Other” where you can type in additional details.

  You can also identify the trainee’s training curriculum, such as if the trainee is an MCH LEND trainee, ADD UCEDD trainee, OSEP, pediatric residency trainee, and so on. There is also an option for “Not Applicable”.

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Once you have completed all required fields and are happy with your selections, save the page.

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.

4.3 Managing Existing Long/Medium-term Trainee Records

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Managing Existing Long/Medium-term Trainee Records”. In this video, we will demonstrate how to manage (edit, view, and delete) existing Trainee main + annual record pairs in the Trainees Dataset.

Before getting started, there are two notes regarding trainee main and annual records:

1. Trainee main records may be edited at any time regardless of which reporting period that you are in. Remember that the main record contains their name, contact information, address, and demographic information.
2. The trainee annual or year record can only be edited within the current reporting period. Prior years’ records are locked for editing on August 1 of each year. Remember that the trainee annual record contains information specific to their training year, e.g., long/medium-term trainee status, discipline, and presentations completed during the training year.

To view existing long/medium-term trainees within the current year of data collection, go to the Trainees Dataset and select “Manage Long/Med term Trainees” from the navigation menu.

The “Manage Long/Med-term Trainees” screen will list all trainees currently entered within the current year of data collection.

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At the top right of the “Manage Long/Med-term Trainees” screen, you will see:

1. Advanced Search, to search for records across the Trainees Dataset,
2. Survey Instructions, which will be helpful for surveying former trainees,
3. The Data Dictionary. This resource offers a comprehensive overview of data entry in all areas of the Trainees Dataset, along with definitions for all fields.

Information listed for each trainee will include:

- First and last name,
- The “Manage Main Rec” column to edit the trainee’s main record containing their contact and demographic information,
- Fiscal Year of their annual record for each year that they are were a trainee as entered in NIRS,
- Academic level, discipline, and trainee type (Options include UCEDD, LEND, UCEDD + LEND, LEAH, or DBP) for each year that they were a trainee,
- The “Manage Annual Rec” column to edit the trainee’s annual record, containing information specific to their training experience, such as trainee discipline, contact hours and financial support, and
- An option to select recipients of a quick email tool to message trainees through NIRS.

For trainees with multiple annual year records, you will also note that they have a single main record attached to each annual record. It is important to keep former trainee surveys and contact information in one convenient place and to ensure that the correct information is attached to the applicable trainee.

For example, if a trainee had two main records with the same first and last name, these would be treated as duplicates. Similarly, if a trainee had the two (2) annual records with the same year, these would also be considered duplicates. Trainees should only have one main record + a single annual

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record for each year that they are a trainee. Duplicate trainee records should be avoided.

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 resource for clarifying the definition of fields and form options.

If you click on the three dots under the “Manage Main Rec” column for a trainee, you will see the options to:

- Edit the existing main record,
- View the responses in the main record.

If you click on the three dots under the “Manage Annual rec” column, you will see three sets of options:

- For records in prior years of data collection, you will see only the option to “view” the responses. This is because records from prior years of data collection cannot be edited.
- For records in the current year of data collection, you will see the option to “View” responses in the record, “Edit” the existing responses, or “Delete” the record permanently. The system will ask you to confirm when you have selected the “Delete” option. Deleting a record cannot be undone.
- Click on the topmost annual record. You will see an additional option to “Add” a new annual record to an existing main record. This option will take you to the annual record form to enter data applicable to the trainee’s training experience.

  Ensure that you select the applicable “Fiscal Year” from the drop-down menu in the first field provided on the form.

If you want to manage (edit, view, delete) all existing Trainee long- or medium/intermediate-term trainee records within the current year of data collection, they can be accessed by clicking on the Trainees Dataset and

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selecting “Manage Long/Med term Trainees” in the navigation menu.

You can update an existing trainee's main record to edit contact and demographic data by clicking on the three dots under the “Manage Main Rec” column and select the "Edit" option. This will take you to a form where you can edit existing responses. You may edit the trainee's main record at any time.

To edit the annual record, you can click on the three dots under “Manage Annual Rec” column and select the “Edit” option. Remember that you may only edit annual records within the current year of data collection. Prior year records are locked for editing at the start of August of each year.

To add a new annual record, click on the three dots under the “Manage Annual Rec” column on the topmost trainee annual record. Click on the “Add” button. This will take you to the annual record form to enter data applicable to the trainee’s training experience.

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.

4.4 Adding New Short-term Trainee Records

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Adding New Short-term Trainee Records”. This video will demonstrate how to create a new short-term trainee record.

NIRS users with access to the Trainees Dataset have access to add and manage trainee records. If you have access to the Trainees Dataset, you will see that it is viewable in the navigation menu at the top of the page when logged into NIRS.

Before getting started, you need to determine whether the trainee is a long, medium/intermediate, or short-term trainee.

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Long-term trainees are individuals with greater than or equal to 300 contact hours within the training Program in the reporting period

Intermediate-term/Medium-term Trainees are individuals with 40 or more, but less than 300, contact hours with the training Program.

A Short-term trainee is an individual who receives less than 40 hours of training.

For the purposes of this training, you will enter a record for a short-term trainee.

You should avoid entering duplicate trainee records. You may use an advanced search to check if the trainee has been entered into the system. In the Trainees Dataset, select “Advanced Search” from the navigation menu.

- Next to "Fiscal Year(s)," ensure that the current year of data collection is selected. If needed, select the "x" to clear all selections and click into the box to select the applicable year.
- For “Trainee Type”, search for “Short Term” trainees.
- In the selection criteria, select "TRAINEE Last name (T)" in the first drop-down menu, "like" in the second drop-down menu to search regardless of spelling, and then type in the trainee's last name in the third box.

There are two outcomes:

1) There is no trainee record with that name.
   In this scenario, you should create a new short-term trainee record for the trainee.

2) You found a trainee in the system.
   In this scenario, you may edit existing responses in the Short-term trainee record since they are already in the system.

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This video will cover the first option.

To add a new short-term trainee record, click on the Trainee's Dataset and select "Add Short-term trainee" from the navigation bar. This will take you to the online form to enter their information. At the top of the page, you will see the:

- Advanced Search, to search for records across the Trainees Dataset,
- Survey Instructions, which will be helpful for surveying former trainees, and
- The Data Dictionary. This resource offers a comprehensive overview of data entry in all areas of the Trainees Dataset, along with definitions for all fields.

Note that for UCEDDs reporting to ACL, while you may record short-term trainees in the Trainees Dataset, there is no trainee section on short-term trainees in the UCEDD Annual Program Performance Report (PPR). You should record your short-term trainees as participants in the Activities Dataset.

Let's go through the short-term trainee form together.
Required fields are indicated with an asterisk (*) next to the field and must be completed before you can save the form.

Please note that the contact information collected in these fields is for Program and Center use only and is not used by the federal government to contact trainees directly. For example, within MCHB reporting, a personal email address serves only as a unique identifier to distinguish records, not as a method for federal outreach.

In the short-term trainee record, you will be asked to provide information on the trainee's:

- First and last name,
- Middle name or any former name(s),

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- County of Origin,
- Discipline of the trainee,
- Their date of birth,
- If the trainee is a first-generation college student, meaning that their parents did not attend school beyond high school. There is option to “choose not to disclose” if they choose not to answer.
- Race, ethnicity, and gender. There is an option for each of these fields to “Choose not to disclose” if desired.
- You should indicate their personal relationship to disabilities, such as if they are a person with a disability, or a family member of a person with a disability. You should select all option(s) that apply. This is the only required question on the short-term trainee form.
- The last two fields can be left blank as the trainee fills them out during the annual contact update, which we will cover in a future video.

Once you are happy with the selections, save the form.

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.

4.5 Managing Existing Short-term Trainee Records

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Managing Existing Short-term Trainee Records”. This video will demonstrate how to manage (edit, view, and delete) existing Trainee short-term records in the Trainees Dataset.

To manage (edit, view, delete) all existing short-term trainee records within the current year of data collection, they can be accessed by clicking on the Trainees Dataset and selecting “Manage Short-term Trainees” in the navigation menu.

At the top right of the “Manage Short-Term Trainees” screen, you will see:

1. Advanced Search, to search for records across the Trainees Dataset,

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2. Survey Instructions, which will be helpful when surveying former trainees, and
3. The Data Dictionary. This resource offers a comprehensive overview of data entry in all areas of the Trainees Dataset, along with definitions for all fields.

Information listed for each trainee will include:

- First and last name, if provided in the record during data entry
- The “Manage Main Rec” column to edit the trainee’s short-term record containing their contact and demographic information,
- County in which the trainee resides, if provided during data entry
- Discipline, if provided during data entry

To edit, view, or delete a trainee, find the trainee’s name in the list.

If you click on the three dots under the “Manage Main Rec” column for a trainee, you will see the options to:

- “Edit” the existing short-term trainee record. If you click on this option, you will be taken to the form to edit existing responses.
- An option to “View” the existing responses in the short-term trainee record.
- For records in the current year of data collection, you will also have the option to “Delete” the record. The system will ask you to confirm. Deleting a record is permanent and cannot be undone.

Just as before, you can update an existing trainee's short-term record to edit contact and demographic data by clicking on the three dots under the “Manage Main Rec” column and select the "Edit" option. This will take you to a form where you can edit existing responses. Keep in mind that you may only edit short-term trainee records within the current year of data collection.

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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.

4.6 Overview of the “Advanced Search” Function in the Trainees Dataset

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Overview of the Advanced Search function in the Trainees Dataset”. This video will provide an overview of the “Advanced Search” function in NIRS, its purpose, and walk through an example to search across trainee records in the Trainees Dataset.

What is the “Advanced Search” function, and how can it be used?

The Advanced Search function allows users to search across records entered in the Dataset. A few examples include:

- To quickly locate all records within a specific year,
- To search long/medium/intermediate trainees or short-term trainees across the Center/Program for all training years,
- To locate trainees by name, which may be helpful when entering new records to eliminate duplicate data entry,
- To search for trainees within a specific discipline, and
- To search for trainees who have received specific funding.

NIRS users can also add several search conditions. This makes the Advanced Search function a very useful tool.
Let’s do an example together.

To get to the Advanced Search in the Trainees Dataset, log in to NIRS. In the navigation bar at the top of the screen, click on the Trainees Dataset and select “Advanced Search” on the right-hand side.

On this page, you will find a search bar to search across all records within a specific year. You will also see a link to the data dictionary in the top-right corner of the screen.

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Going down the page, you will see search options:

- The “Fiscal Year(s)” option allows you to select which years of data you want included in the results. Please remember that data is entered from July 1 to June 30 of each year. The current year of data collection may be selected.

  To indicate a different year or multiple years, you can click the “fiscal year(s)” drop-down menu. Select as many years as you want. To search across all years of data collection to date, scroll all the way to the top of the drop-down box and select “All Years”.

  To remove a year, click on the “X” mark next to the year that is listed next to the field. At least one year of data collection must be selected.

- The “Trainee Type” option is a radio button. The “Trainee Type” will search for all records within the category selected.
  - If you select “Long/Med Trainee”, the results will include trainee records who have between 40 and 300 or more contact hours.

    If you select “Short-term”, it will include only records of trainees with less than 40 hours.

- The “Discipline” option is a drop-down menu that allows you to specify the trainee’s discipline as identified in their annual record.

- The “Funding Sources” option is a check-box, which allows you to specify specific funding sources or type of funding received as part of their training experience. You may specify as many funding sources as desired.

- Below the “Funding Sources” are “Selection criteria”. “Selection Criteria” allow you to refine your search to specific parameters. Keep in mind that each new addition to the selection criteria will decrease

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the number of records that you receive from the results. The selection criteria in the Advanced Search have three blocks/sections:

1) The first drop-down box lists all fields as they appear on the form. Each field is listed in the following format:

   i) Which form the field is listed from in capital letters.

   "TRAINEE" means that it originates from the main record form in the Trainees Dataset, "SHORTTERM" means that it originates from the short-term trainee form in the Trainees Dataset, "YEAR" means that it originates from the annual record form in the Trainees Dataset, and "SURVEY" means that it originates from the former trainee survey form in the Trainees Dataset.

   ii) Next, the field header from the online form is listed in lower-case letters.

   iii) You will also see a pair of parentheses, which identifies the field type. For example, "(L)" means a list, "(N)" means it is a numeric field, "(T)" means that it is a text field, "(D)" means that it is a date formatted as MM/YYYY or DD/MM/YYYY. "(Y)" means that it is either "Yes" or "No".

2) The second drop-down box is a comparator.

   "Equal to" comparators mean an exact match in spelling or selections.

   "Blank" comparators return results when the field is empty, or a response was not provided during data entry.

   "Not Blank" comparators will return results only when a response has been provided to the field.

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"Not Equal to" comparators indicate that the result will differ from the value in the third box.

"Greater than" means the number provided will be higher than the one provided. Results will exclude records where the record value equals the provided value.

"Less than" means the number provided will be lower than the one provided. Results will exclude records where the record value equals the provided value.

"Greater than or equal to" means that the number provided will be higher than what was provided. Results will include records whose value match the value provided.

"Less than or equal to" means that the number provided will be lower than what was provided. Results will include records whose value match the value provided.

"In the list" means that results will include only those values provided.

"Begins with" means that the records in the results will start with a string of text or certain letters in the specified field.

"Like" returns results that match a pattern. This means that it will return records that do not match the exact spelling.

"Not Like" will return results that do not match a specific pattern. This means that it will return records that are completely different from what is provided.

3) The third portion will either be a text box or a drop-down box, depending on the field selected in the first portion of the "selection criteria". For drop-down boxes, you can specify a

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category to refine your search. For text boxes, type in your selections.

The Advanced Search function can be used to search for any trainee to ensure that they are not already entered into the system.

The Advanced Search can also be used to find collaborations with trainees.

For example, let's say that you are working with a trainee who is exploring different collaboration ideas. The trainee has asked you to find research that prior trainees have worked on in a specific topic, e.g., fetal alcohol spectrum.

You might recall that there are two fields in the Trainee's annual record that will be helpful to us: 1) the "Product(s) Produced by the Student this year" field, and "Presentation Name" field. To search prior trainees deliverables within a specific topic, follow these steps:

- For "Fiscal year(s)" select all years of data collection. In this case, you will click on the "X" button to remove the selections, and make sure that "All Years" is selected from the drop-down box.
- Select "Long/medium term" for the "Trainee Type".
- Leave "Discipline" and "Funding Sources" blank.
- In the "Selection Criteria", there are three blocks. In the first box, you need to identify the field.

  You also know that the "Presentation Name" field is located in the Trainees Annual record form. As you scroll through the options, you will find one listed "PRESENTATION Presentation Name (T)".

- In the comparator or middle drop-down menu, select "like" to identify any trainee records with similar spelling,

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- In the last field, type in the specific topic, for example “fetal alcohol spectrum” or “FAS”.

- Click “Search” highlighted in blue at the bottom of the page to find all records that could match with the trainee.

If the results come back blank, you will see a table with text indicating that there is “No data available in the table”.

If the results came back with a matching trainee record result, you will see the following for each trainee:

- First and last name,
- The “Manage Main Rec” column to edit the trainee’s main record containing their contact and demographic information,
- Fiscal Year of their annual record for each year that they were a trainee as entered in NIRS,
- Academic level, discipline, and trainee type for each year that they were a trainee. Options include UCEDD, LEND, UCEDD + LEND, LEAH, or DBP.
- The “Manage Annual Rec” column to edit the trainee’s annual record, containing information specific to their training experience, such as trainee discipline, contact hours and financial support,
- An option to select recipients of a quick email tool to message trainees through NIRS.

  You can select individual trainees or click “Select All” to select all trainees. On the right-hand side, you will see the Quick Email feature to CC an email address, draft a subject line, and write content for the email. You may also select a template, managed from the Trainees Dataset by selecting the “Manage Email Manager” in the Dataset navigation menu, instead of writing content in the text box provided.

  You may also preview the email message before sending it, email the message without previewing it, and reset the prompt using the

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applicable buttons at the bottom. Keep in mind that the tool will send the email from NIRS@aucd.org, so it is important to CC yourself or a NIRS Administrator who will monitor the message for questions.

If a trainee main + annual record matches the specific research topic, you could check their main record for a valid email address to set up a potential collaboration. You might also check their annual record for any additional product(s) produced during their training year.

As a general rule of thumb, keep your search parameters as simple as possible. Keep in mind that the more selections you make, the fewer results you might have. It may also be helpful to have the Trainees data form(s) open in another browser. For example, if you are using Google Chrome, open NIRS in Microsoft Edge to follow along with the form and help guide your process in the “Selection Criteria.”

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.

4.7 Allocating Trainee Records

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Allocating Trainee Records”. This video will discuss the allocation of trainee records across two scenarios:

1) Many training Programs have trainee cohorts that start or end outside of the July 1 to June 30 timeframe. We will discuss how to handle this scenario.
2) The second scenario is unique to co-located UCEDD + LEND Centers/Programs. If your UCEDD + LEND enrolls trainees with different training hours, you will need to plan data entry accordingly.

   For example, some trainees may complete a year of long-term LEND training while simultaneously participating in an intermediate-term UCEDD trainee training year.

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Let's dive into each scenario.

1) If your Center or Program enrolls trainee cohorts on a schedule that does not align with the July 1 to June 30 data collection year, you will need to plan accordingly to ensure that data entry is completed accurately for these trainees. This is important because the July 1 to June 30 time frame is used to determine when trainees should be surveyed.

   For example, your Program may enroll trainees from May 1 to November 30 each year.

   In this case, you will need to enter a single trainee main record accompanied by two trainee annual records, one for each fiscal year.

   - In the first annual record, apportion the number of hours that they were engaged in your training Program from May 1 to June 30. Be sure to indicate if they were considered an intermediate/medium-, or long-term trainee when they graduate from the training Program.

   - For the second annual record, you would enter the trainee's contact hours and intermediate/medium-, or long-term trainee status between July 1 to November of the following fiscal year. Keep in mind that trainee status should be selected based on when they graduate from the training Program.

   Let's demonstrate an example in NIRS.

   Your training Program has a trainee who was engaged in UCEDD trainings from May 1, 2026 and graduated on November 30, 2026.

   First, you must use an advanced search to check if they have been entered into the system. In the Trainees Dataset, select "Advanced Search" from the navigation menu.

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- Next to "Fiscal Year(s)," select the "x" to clear all selections.
- Select "All Years" from the fiscal year drop-down menu.
- For the “Trainee Type”, select “Long/medium-term”.
- In the selection criteria, select "TRAINEE Last name (T)" in the first drop-down menu, "like" in the second drop-down menu to search regardless of spelling, and then type in the trainee's last name in the third box.

i. If results are populated, find the trainee in the menu. Select "Add" under the "Manage Annual Rec" column next to the existing trainee record. This will take you to a blank annual record form.

ii. If results are not populated, go to the Trainees Dataset and select “Add Long/Medium-term Trainee” to create a new main and annual record pair for the trainee.

For the purposes on this demonstration, a result was populated, so you will click on the three dots under the “Manage Annual Rec” column and select “Add”. This will take you to a blank annual record form where you will enter their training information from May 1, 2026 through June 30, 2026.

- In the first field, “Fiscal Year”, make sure that you select the correct fiscal year. It will default to the current year of data collection, though you can click on the drop-down to change it. For May 1, 2026 through June 30, 2026, ensure 2025 is selected.
- Enter their academic level, degree program, position, and discipline.
- For contact hours, enter the contact hours in your training Program only for May 1, 2026 through June 30, 2026. Let’s say that they attended trainings twice a week for 8 hours, or roughly 128 hours for May and June 2026.
- Enter their enrollment status in their academic program.
- For start date, enter May 1, 2026. For end date, enter November 30, 2026. They are a UCEDD-only trainee.
- Select “Long-term” for their trainee type, as they will be a long-term trainee by the time they complete the training Program. Fill out the remaining applicable fields. Save the page.

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Now, find the trainee again and add another annual record.

- This time, make sure to select FY 2026 to enter data for their training between July 1 through November 30, 2026.
- Enter the number of contact hours across July 1 and November 30, 2026. Keeping with the previous record, they complete roughly 64 hours per month, or 320 hours across the five (5) months.
- Enter data into the remaining fields as applicable. Save the page.

When you finish data entry, go to the Trainees Dataset and select "Manage Long/Med term Trainee" from the navigation menu. You will see that the trainee has two annual records, one for FY 2025 and another for FY 2026.

This approach will ensure that trainee records are apportioned with the correct number of hours across each fiscal year and that former trainee surveys will populate in Standard Reports appropriately. This concludes the first scenario.

2) The second scenario is unique to co-located UCEDD + LEND Center/Programs.

For example, if your training Program enrolls LEND long-term trainees who concurrently complete a UCEDD intermediate-term training year, or vice versa, you should create a separate main and annual record pair for each trainee to track LEND and UCEDD training.

Why should you create two main + annual record pairs for these trainees? There are two factors that are important to consider:

i. Each annual record attached to a trainee's main record requests their long- or intermediate-trainee status only once, and thus does not allow for the differentiation between LEND and UCEDD training status when the trainee's engagement in the two Programs is not the same, and
ii. Each main record contains the trainee's former trainee survey. Entering a main and annual record pair to contain the former trainee

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surveys for UCEDD training and former trainee surveys for LEND training separately will allow for more accurate data recording. Of course, this will result in the trainee completing two surveys, one for UCEDD training and the other for LEND training.

In an example of a trainee who completes a long-term LEND training year while concurrently completing an intermediate-term UCEDD training year, the two main and annual record pairs will include:

1) The first main and annual record pair will include data on their LEND long-term training experience. This record will also store their LEND-only surveys.
   - You should enter the trainee's name identifier and program type in their main record, such as "Johnny Test (LEND-only)."
2) The second main and annual record pair will include data on their UCEDD intermediate-term training experience. This record will also store their UCEDD-only surveys.
   - You should enter the trainee's name identifier and program type in their main record, such as "Johnny Test (UCEDD-only)."

Including the trainee's program type in the name will prevent it from being flagged as a duplicate record.

To do this, you would go to the Trainee's Dataset and select "Add Long/Med Term Trainee" from the navigation menu.

- In the first field, first and last name, enter their name with a "(LEND-only)".
- Complete data entry as normal for the remainder of their main + annual record pair. Select "YES" to the question "Is this a LEND trainee?" in the annual record.
- Complete the same steps again, entering "(UCEDD-only)" at the end of their name in the main record.
- Complete data entry as normal for the remainder of their main + annual record pair. Select "YES" to the question "Is this a UCEDD

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Interdisciplinary Preservice Preparation or Continuing Education Trainee?" in the annual record.

You can search for the trainee by name in the advanced search when finished. You will see that the trainee has two main + annual record pairs,

1) for LEND only data, and
2) UCEDD only data.

Be sure to use the applicable unique survey login password for the trainee's main record and survey link from the survey instructions when sending the former trainee's survey to the trainee.

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.

4.8 Surveying Former Trainees

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled "Surveying Former Trainees". This video will discuss the purposes and timeline of surveying former trainees and demonstrate how to survey your former trainees.

Before jumping into NIRS, one resource on the AUCD website details the process of surveying former trainees. Navigate to the NIRS Resources page by going to aucd.org and clicking on "NIRS" under the About section. Select "NIRS For OIDD-Funded Programs", and then "Training Courses, Demos, Tip Sheets" at the top of the page. You will find a "Guidebook on Surveying Former Trainees" under the "Tip Sheets" column.

Paper versions of the former trainee surveys are also available by messaging NIRS@aucd.org.

Survey questions vary depending on which funder the survey is reported to. Please also note that the former trainee surveys must be entered electronically.

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There are several questions that should be answered before getting started. Let's discuss them one by one.

1) What is the former trainee survey?

The former trainee survey is intended to monitor the impact of the training provided by your training Program and track trainees' progress after program completion.

Former trainee surveys from LEND, LEAH, and DBP trainees should be reported to the Maternal and Child Health Bureau (MCHB) of the Health Resources and Services Administration (HRSA).

Former trainee surveys from UCEDD trainees are included in reporting to the Administration for Community Living (ACL) of the Office of Intellectual and Developmental Disabilities (OIDD). Former trainee surveys received and entered in NIRS between August and June 30 of the year are included in the UCEDD annual Program Performance Report (PPR) for the current reporting period.

2) How often should surveys be provided to former trainees?

MCHB expects former trainees to be surveyed every 2- and 5-years after they have completed the training Program.

ACL expects former trainees to be surveyed every 2-, 5-, and 10-years after they have completed the training Program.

For example, let's say that it is FY 2026. You will survey trainees who graduated from your training Program in FY 2024 (2-years ago) and FY 2021 (5-years ago) for MCHB, or FY 2024 (2-years ago), FY 2021 (5-years ago), and FY 2016 (10-years ago) for ACL.

3) Who should be surveyed?

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LEND, LEAH, and DBP training Programs reporting to MCHB must survey their long-term trainees 2- and 5-years after program completion.

UCEDD training Programs reporting to ACL have options when reporting former trainee surveys completed by their former UCEDD trainees. As ACL defines a trainee as any individual who is participating in a UCEDD interdisciplinary or discipline-specific training Program, UCEDD Centers must choose one of the following options when surveying their former trainees:

- Survey only former UCEDD long-term trainees 2-, 5-, and 10-years after they have graduated from your training Program,
- Survey only former UCEDD intermediate-term trainees at the same intervals, or
- Survey both UCEDD long- and intermediate-term trainees at the same intervals.

  Regardless of which option you select, UCEDD Centers must track the number of former trainee surveys sent to UCEDD trainees, regardless of how many people respond to them throughout a reporting period, that is July 1 through the June 30. UCEDDs will report the number of surveys sent in the UCEDD Annual PPR.

4) What if my Center/Program surveys trainees at additional intervals beyond what is required for reporting to federal funders?

While your Center/Program may survey former trainees at additional intervals, only surveys completed 2- and 5-years after completing your training Program will/should be shared with MCHB, and 2-, 5-, and 10 years after completing your training Program will/should be shared with ACL.

Now that we have discussed the general requirements of former trainee surveys, let's get into the important timeline for surveying trainee alumni.

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- Former trainee surveys for each reporting year may be initiated as early as August of that year. At the latest, you should initiate the process of surveying former trainees before March to allow sufficient time for trainees to complete the survey.
- Former trainee surveys must be received and entered in NIRS by June 30 of each year.
- NIRS will remain open for data cleaning through July. The only exception is former trainee surveys, which cannot be edited after June 30.
- If a trainee submits a survey after June 30, please contact NIRS@aucd.org.

Now that you understand the purposes and timeline for surveying trainees, you are ready to start surveying.

When surveying former trainees, you need to answer the following questions:

1) Which survey method should be used, paper forms or online forms?
2) Where is the information found on surveying trainee alumni?
3) What type of information is needed to send the survey?

Let's discuss each item individually.

1) There are two methods to survey former trainees:
   a) paper forms, and b) the electronic survey.
   When considering which option to use, consider the following:
   - Pros of using paper forms include:
     - Paper forms are available in both English and Spanish.
     - Paper forms allow administering the trainee survey without Wi-Fi access.
     - Paper forms also provide an additional data quality check during the secondary data entry.
   - Cons of using paper forms include:

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- Paper forms are more prone to “human error” as survey responses must be recorded twice.
- There is an increased faculty/staff burden as responses must be recorded twice.
- Additional faculty/staff training may be required to acquire trainee responses consistently and to enter them into the NIRS application.

Regardless of which option you use, you must enter the survey into NIRS electronically.

2) You will need four things to survey former trainees electronically:

i. **The link to the survey**,

The survey link is in the “Survey Instructions”, linked at the top of each page in the Trainees Dataset.

Go to the Trainees Dataset in NIRS and click on any area of the Dataset, e.g., select "Standard Reports" from the navigation menu.

In the top right corner of the screen, click "Survey Instructions". A pop-up window will appear.
On the side navigation bar, ensure that you are on the correct instructions page. For example, if you are surveying former UCEDD or UCEDD + LEND trainees, click on the “LEND/UCEDD survey” page.

Copy the survey link. Paste it into the email you will send to the former trainee.

ii. **Your Center/Program name**, as listed at the top of every page in NIRS,

When trainees log in to complete the survey, they will be asked to select your Program/Center’s name from a list of

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Centers/Programs.

To help them easily identify the correct option, copy and paste your Center's full name as it appears in NIRS, for example, "-AAA Test Center, UCEDD/LEND", into the email you send to trainees. This will ensure they choose the correct Program/Center from the dropdown menu.

iii. **The unique survey login password**, which is easily accessed in Standard Reports in the Trainees Dataset

Surveys contain the trainee's personal information, so the online survey form requires a login. Each trainee's record contains a unique password that allows the trainee to log in to the survey.

To access Standard Reports that will help with Surveying Trainees, log into NIRS, and select "Standard Reports" on the right-hand column when clicking on the Trainees Dataset.

Depending on the type of trainees you are surveying, you will need to select a different Standard Report.

- To survey UCEDD-only and UCEDD + LEND former trainees, there is a Standard Report called "Long-term Survey Info 2020+" under the UCEDD column.

- To survey LEND-only, UCEDD + LEND, LEAH, or DBP former trainees, you should scroll to the bottom of the page and run the Standard Report titled "Long Term Survey Info 2018+" under the "LEND, LEAH, PPC, DBP" column.

The Standard Reports will list the following trainee information:

- The year that they completed your training Program,
- Their name, mailing address, phone number, and email address,

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- Their unique survey login, and
- When the former trainee was last sent the annual contact update.
- Under the "Type" column, you will also see whether the trainee was a long-term (listed as “L”) or medium/intermediate-term (listed as “I”) trainee.

  If a trainee has multiple "L" or "I" entries, this means they participated in the program for more than one year. Each "L" or "I" represents one year of long- or medium-term trainee status.

  If a trainee has multiple long- or intermediate-term entries listed, you should verify the trainee’s terminal year, or when they completed your training Program. You can search for trainees by doing an Advanced Search to search for them by last name.

iv. **A deadline to complete the survey.**

When you email the trainee about the former trainee survey, a due date will help set a timeline for completion and when you might follow up with them. You might consider tagging yourself or a NIRS Administrator on the email to assist with any questions.

Once the trainee completes the survey electronically, the survey is entered automatically into NIRS.

If you are using paper forms, the process will alter slightly, as follows:

1) Select the appropriate paper form based on the Program Type. Again, be sure to send them the correct survey, as questions vary based on the federal funder and Program Type.
2) Instead of sending the survey to the trainee via an electronic link, they should complete the paper form and return it to you.
3) Compile the trainee’s unique survey password and the survey link, and then note the name of your Center at the top of the page in

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NIRS. You must then complete the online survey on their behalf by accessing the former trainee survey link in the "Survey Instructions".

4) Copy and paste the trainee's unique survey login password from the applicable survey info Standard Report in the Trainees Dataset.
5) Complete the survey based on their responses on the paper form and submit the electronic form.

Once a survey has been submitted, you can view all former trainee surveys that have been completed/received in NIRS by going to the Trainees Dataset and selecting "List Survey" from the navigation menu.

From this page, you will see:

- A search bar to view completed former trainee surveys by fiscal year.
- A drop-down on the right-side of the screen to view more entries on a single page. You can flip between pages to view more results by clicking on the "Previous" and "Next" buttons.
- How many entries are on the page, just below the toggle to view more entries.
- Each survey listed by Trainee Name, the date the survey was completed, when the trainee last completed the annual contact update, and the year in which they graduated from your training program.

You can click on the trainee's name highlighted in blue to view their trainee record.

Click on the date listed under the "Survey Completed" column to view their responses in the former trainee survey. You can also view which survey the trainee submitted, listed in the upper left-hand corner of the survey.

In the current year of data collection, NIRS administrators also have the ability to delete a trainee's survey. If you click on the "Delete" button, the system will prompt you to confirm. Deleting a survey is final and cannot be undone.

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You should review the List Survey in the Trainees Dataset periodically throughout the reporting period to ensure that all former trainee surveys have been submitted and received in NIRS by June 30.

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.

4.9 Managing the Annual Contact Update

Welcome to the video of the Trainees Dataset section of the NIRS Learning Modules titled “Managing the Annual Contact Update”. This video will discuss the purposes of the annual contact update and demonstrate sending the annual contact update to former trainees.

Before jumping into the annual contact update, there are two NIRS resources you may find helpful:

1) The first resource will help you understand the impact of the survey. Navigate to the NIRS Resources page by going to aucd.org and clicking on “NIRS” under the About section. Select “NIRS For OIDD-Funded Programs”, and then “Training Courses, Demos, Tip Sheets” at the top of the page. The “Tip Sheets” column has a resource for “Increasing Trainee Survey Responses”, which will outline the benefits of the annual contact update.

2) Additionally, a paper version of the annual contact update is available by messaging NIRS@aucd.org.

The annual contact update is a survey that is used to obtain the most up-to-date contact information for former trainees. The survey is typically completed by each former trainee on an annual basis and should take about two to three minutes for the trainee to complete.

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The survey includes a short questionnaire that asks the trainee alumni to update their physical address, personal email address, emergency contact information, and other contact information.

The annual contact update:

- Improves trainee response rates to the former trainee surveys to monitor trainee progress 2-, 5-, and/or 10-years after they have graduated from your training Program,
- Supports compliance with federal requirements to federal funders, and
- Strengthens the long-term sustainability and credibility of UCEDD and LEND training Programs.

To send the annual contact update electronically, you will need three things:

1) The survey link,
2) The trainee's unique survey login password
3) The trainee's contact information (typically email address)

Let's dive into where to find each item that you will need to send the annual contact update.

First, the survey link to the annual contact update is located in the survey instructions. To access it:

i. Go to the Trainees Dataset in NIRS.
ii. Click on any area of the Dataset, e.g., select "Standard Reports" from the navigation menu.
iii. In the top right corner of the screen, click "Survey Instructions". A pop-up window will appear.
iv. Scroll to the bottom of the instructions page. You will find a section on the Annual Contact Update.
v. Copy the survey link provided there and paste it into the email you will send to the former trainee.

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The trainee's unique survey login password and contact information are in a single location. To access it:

1) From the "Standard Reports" section of the Trainees Dataset, click on the "Annual Update Info" report listed near the top of the page under the "ALL" column.

   Depending on your Program type, you will see different options. For co-located UCEDD and LEND Centers/Programs, you can choose to include only LEND trainees, only UCEDD trainees, or both by checking the applicable option.

2) Run the report. The report lists information to assist you in sending the annual contact update to former trainees, including:
   - The year that they completed your training Program,
   - Their name, mailing address, phone number, and email address,
   - Their unique survey login, and
   - When the former trainee was last sent the annual contact update.
   - Whether the trainee was a long-term (listed as "L") or medium/intermediate-term (listed as "I") trainee is also listed.

     If a trainee has multiple "L" or "I" entries, this means they participated in the program for more than one year. Each "L" or "I" represents one year of long- or medium-term trainee status.

     For example, if a trainee was in your training Program for two or more years, they will have more than one "L" or "I" indicated in the report because they were entered as a trainee for more than one year as a long- or medium-term trainee.

Now that you have everything to send the annual contact update, you should include the following to the trainee via email:

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1) An overview of the annual contact update requesting them to update their contact information,
2) Their unique survey login,
3) The link to the annual contact update, and
4) A due date (optional)

You may also consider tagging yourself on the email to follow up or answer any questions that they may have. That is all that you need to do for the annual contact update.

If the trainee submits the annual contact update electronically, their responses will be recorded when they submit the survey.

If you conduct the annual contact update survey in paper format, you will need to send them the paper form manually. Then, you must complete it on their behalf and enter responses accordingly into the online form.

In this scenario, you should follow the following steps:

1) Instead of sending the annual contact update to the trainee via an electronic link, you must mail them a paper form. Then, complete the electronic survey on their behalf by accessing the annual contact update link in the “Survey Instructions”.
2) Copy and paste the trainee’s unique survey login password from the “Annual Update Info” Standard Report.
3) Complete the survey based on their responses and submit the form.

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.

4.10 Overview of Standard Reports in the Trainees Dataset

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Overview of Standard Reports in the Trainees Dataset”. This video will provide an overview of Standard Reports in the Trainees Dataset and their purposes.

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NIRS offers many helpful tools to provide data to government agencies and to answer internal questions for your Center/Program. Standard Reports in the Trainees Dataset contain pre-populated reports based on the data entered in to NIRS. This includes the aggregate data across the main, annual, short-term, and former trainee survey forms in the Trainees Dataset.

To access the reports, you need to have NIRS Administrator access to the “Trainees” Dataset. In the Trainees Dataset, select "Standard Reports" in the navigation menu in the right-hand column.

At the top of the page, you will also find a search function, an advanced search, and the data dictionary. Going down the page, the reports are separated into three categories "ALL", "UCEDD" and "LEND, LEAH, PPC, DBP", which include Standard Reports helpful to Centers/Programs. Under each category, the reports can be clicked to expand options to run them.

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

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

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

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

You may 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 to analytical software.

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Examples of Standard Reports for the Trainees Dataset include:

- Data Entry Errors. Data Entry Errors, which should be run periodically throughout the year to ensure that your data is not missing vital fields. A list of fields that require your attention is also provided in the report for your convenience. You should verify that all errors are resolved in each record. To resolve the issue, read the "Missing" column and then click on the record listed in blue under the "total" column. This will take you to the record to edit. Save the page once all corrections have been made. Rerun the "Data Entry Error" Standard Report in the Trainees Dataset. If successful, the record will no longer be listed.

- Duplicates. You might use this Standard Report to check if a trainee has multiple long/medium-term trainee records or multiple short-term trainee records. Click on the trainee's name highlighted in blue to be taken to the trainee's record.

- Annual Contact Information. This provides a list of trainees who should be sent the annual contact update to update their contact information.

- Under the "UCEDD" column, there are Standard Reports to review data from the former trainee survey for the UCEDD Annual PPR, and another that lists trainee data vital to sending UCEDD trainee alumni the former trainee survey.

- Under the "LEND, LEAH, PPC, DBP" column, there are various Standard Reports that will assist with reporting to MCHB.

  At the bottom of the column, you will also find the "Long Term Survey Info 2018+," which provides information vital to surveying former LEND, LEAH, or DBP trainee alumni 2-, and 5-years after they graduated from your training Program.

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- Under the “LEND, LEAH, PPC, DBP” column, another report titled “Number of Trainees by Discipline and Current Contact Hour Ranges 2018+” lists each trainee by discipline and contact hours. This includes Short term trainees (<39 hours), level 1 medium-term (40-149 contact hours), level 2 advanced medium-term trainees (150-299 contact hours), and long-term trainees (300+ contact hours).

Under each category, the reports can be clicked on to expand options for the report and run them. As you explore the Standard Reports, you will note that there are additional options for some reports. For example, you can select specific applicable fiscal year(s) to view data from specific years of data collection.

It is important to note that forms change from year to year based on changes in federal reporting requirements, so some Standard Reports will only allow you to view one year at a time. Others, like the data entry error Standard Reports, will allow you to view multiple years of data collection.

You will also note that co-located UCEDD + LEND Centers/Programs can view some Standard Reports by the program type indicated in trainee records by clicking on the UCEDD, LEND, and/or UCEDD + LEND checkbox.

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.

4.11 Overview of Custom Reports in the Trainees Dataset

Welcome to the video of the "Trainees Dataset" section of the NIRS Learning Modules titled “Overview of Custom Reports in the Trainees Dataset”. This video will discuss the purpose of Custom Reports and demonstrate creating a Custom Report in the Trainees Dataset in NIRS.

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Custom Reports can be used to create reports to view records in the respective Datasets. Custom Reports allow you to select any field from the online form to display in the report.

Before creating a Custom Report, check whether a Standard Report already exists by going to the Trainees Dataset and selecting “Standard Reports" from the navigation menu.

Once you have confirmed that a Standard Report does not already exist, you can access Custom Reports in the Trainees Dataset by clicking on the Trainees Dataset and selecting “Custom Reports” under the right-hand column in the navigation menu.

At the top of the page, you will see a search bar to search Trainee records within specific years, a link to the “Advanced Search” feature, and the Data “Dictionary”.

Going down the page, you will see a blue button “ADD New Custom Report”.

Custom Reports that have already been created can be organized into categories. Custom Reports that were created in the past will be listed in the applicable category. There is also a category for Custom Reports that are not otherwise categorized. You should click on the “+” sign next to the category to expand each category to view the existing Custom Reports.

When you expand the category, you will see the list of Custom Reports that are in that category.

For each Custom Report, you will see:

- The title of the Custom Report,
- A drop-down menu on how you would like to view the results,
- The manage column, which will list the options “Run Report”, “Edit”, “Copy” and “Delete” by clicking on the three dots,

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- The date the Custom Report was created and last edited, and
- The number of records that are included in the Custom Report from the last time it was used.

To add a new Custom Report, click on the blue “ADD New Custom Report” button at the top left of the page. This will take you to the form to specify which data you would like to include in the Custom Report and how you would like to refine your search query.

You will see the following fields:

- The “Title” for the Custom Report
- The “Default” display for the Custom Report
  - “Browse” will open up a pop-up window in your internet browser,
  - “Download-comma” will download the results in a .CSV file which can be opened in an Excel Spreadsheet, and
  - “Download-tab” will download the results to a .TXT file that can be opened in a Notepad application.
- “Category” will allow you to organize your Custom Reports
- “Options” will change how the results are presented.
  - “Hide Border in Browse” will remove the grid lines in the results pop-up window,
  - “Hide Detail” will summarize all data into a single data point with totals for each selected field,
  - “Distinct” will hide any duplicate responses, e.g., if two responses have the same response in the first selected field, they will be removed from the results, and
  - “Full Memos” will expand all text boxes.
- “Notes” is a text box. You may want to use this box to give yourself a reminder of the Custom Report's general purpose and any instructions for updating it from year to year.
- “Selected fields” are the fields from the online form that you want to include in your query.

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On the left is a list of all fields from the online form.

On the right side are the fields from the online form that will be included in your query.

You can click on the desired fields in the left box and click on the double right-pointing arrows (">>") button to move them into the results box on the right. Click the double left-pointing arrows ("<<") to move the field back from the results box on the right to the Custom Report box on the left.

Selected fields are displayed in the same way as "Selection Criteria".

- In the next section, "Selection Criteria", you will refine your results to specific parameters. Keep in mind that each new addition to the selection criteria will decrease the number of records that you receive from the results. The selection criteria in the Custom Reports have three sections:

  1) The first drop-down box is a list of all fields as they appear on the form. Each field is listed in the following format:
     In capital letters, you will see which form the field originates from.

     "TRAINEE" means that the field originates from the main record form in the Trainees Dataset, "SHORTTERM" means that it is listed from the short-term trainee form in the Trainees Dataset, "YEAR" means that it originates from the annual record form in the Trainees Dataset, and "SURVEY" means that it originates from the former trainee survey form in the Trainees Dataset.

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Next, the field header from the online form is listed in lower-case letters.

You will also see a pair of parentheses, which identifies the field type. For example, “(L)” means a list, “(N)” means it is a numeric field, “(T)” means that it is a text field, “(D)” means that it is a date formatted as MM/YYYY or DD/MM/YYYY. “(Y)” means that it is either “Yes” or “No.

2) The second drop-down box is a comparator.

"Equal to" comparators mean an exact match in spelling or selections.

"Blank" comparators return results when the field is empty, or a response was not provided during data entry.

"Not Blank" comparators will return results only when a response has been provided to the field.

"Not Equal to" comparators indicate that the result will differ from the value in the third box.

"Greater than" means the number provided will be higher than the one provided. Results will exclude records where the record value equals the provided value.

"Less than" means the number provided will be lower than the one provided. Results will exclude records where the record value equals the provided value.

"Greater than or equal to" means that the number provided will be higher than what was provided. Results will include records

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whose value match the value provided.

"Less than or equal to" means that the number provided will be lower than what was provided. Results will include records whose value match the value provided.

"In the list" means that results will include only those values provided.

"Begins with" means that the records in the results will start with a string of text or certain letters in the specified field.

"Like" returns results that match a pattern. This means that it will return records that do not match the exact spelling.

"Not Like" will return results that do not match a specific pattern. This means that it will return records that are completely different from what is provided.

3) The third portion will either be a text box or a drop-down box, depending on the field selected in the first portion of the "selection criteria". For drop-down boxes, you can specify a category to refine your search. For text boxes, type in the box provided.

- At the bottom of the Custom Report, you can choose to list fields by ascending (A to Z) or descending (Z to A) order via the "Sort and Group By" option.

  Below the "Sort and Group By" option, the fields on the left will match those selected in the "Selected fields".

  You can specify which fields you would like to sort by via moving the field(s) to the right-hand side using the right-pointed double arrow (">>"), or remove the field from the sorting by clicking on the left-pointed double arrow ("<<").

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- The “Groups and Subtotal on first fields” field allows you to create totals for rows. For example, it may show aggregate totals for each category rather than plain numbers, such as the total funding amount within a specific category.

Let’s do an example. Let’s say that your UCEDD is completing the Annual UCEDD Program Performance Report (PPR), and your Director has asked you to review all UCEDD trainees by name and discipline to ensure that part 2 on Interdisciplinary Preservice Preparation is complete. While you could review each main and annual record pair one by one, there’s a faster option: use a Custom Report.

- In the “Title”, you could call it “Part 2: Trainees by Discipline”
- Keep the “Default” set to “Browse” because I prefer to view results in an internet web-browser.
- For “Category”, you could enter “UCEDD Annual PPR”.
- For “Notes”, I will leave myself a brief note on the purposes of the Custom Report.

  For example, say that this Custom Report is to assist with reviewing the number of UCEDD trainees by discipline in the UCEDD PPR, core function on Interdisciplinary Preservice Preparation. Also provide a reminder to update the “Fiscal Year” in the selection criteria for the next time you run this report next year.

  I will point this out in the demonstration when I get to it.

- For “Selected fields”, these are the fields from the online form. There are four fields that I am interested in, 1 & 2) the trainee’s first and last name, 3) the trainee’s type so I know if they are medium or long-term, and 4) the trainee’s discipline.

  I know that the first and last name fields are listed in the Trainees Dataset main record form for the first two fields, so I am looking for

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selected fields with “TRAINEE” listed in capital letters. The trainee’s type and discipline are in the trainee annual record form, so I will look for “YEAR” in capital letters for those two.

The first two fields are listed as “TRAINEE First Name (T)”, and “TRAINEE Last Name (T)”, meaning that it is from the Trainees Dataset main form, the headers of the fields are “First” and “Last” name, and they are both text fields.

Click on them and move them into the left column.

From there, I will do the same for “YEAR Trainee Type (L)” and “YEAR Discipline (T)”, for the “Trainee Type” and “Discipline” fields from the annual record.

- For “Selection Criteria”, you are interested in trainees in the current reporting period. This is because you want to show current trainees included in the PPR. You also want to see only UCEDD trainees in the results, which will be important if you are a co-located UCEDD + LEND Center/Program. You will need two criteria to do this.

  First, you need to refine the year(s) you are searching for. Then, we need to search for UCEDD or UCEDD + LEND trainees.

  For the first criteria, select “YEAR Fiscal Year (N)” in the first box, “equal to” in the second box, and the current year of data collection in the third box. In this case, type “2026” to specify that you want to receive only records from 2026.

  In the second criterion, select “YEAR UCEDD trainee (L)” in the first box, “equal to” in the second box, and select “Yes” in the third box. This will allow you to search for only UCEDD trainee records included in the UCEDD Annual PPR.

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LEND-only records are not included in reporting to the UCEDD federal funder.

You should also make sure that you select the correct fields. Both fields are in the Trainee Dataset annual record form, so you must select the fields with “YEAR” at the front.

- I do not want to sort or group my results, so I will review my selections to ensure I did not miss anything, then save the report.

Now that you have created the report, you will see a new “UCEDD Annual PPR” category has been added. Click the " + " sign to expand the category and see that the report we just made is now listed there.

You will see that if you click the title highlighted in blue, it will automatically display results based on the "Default" option selected earlier.

You can also click “Present Results In” to select a different method to view the results.

If you want to edit the report again, click on the three dots and select “edit.” You may also want to select “copy” first to create a copy of the report so that you can easily revert to the previous version until you finalize your query.

When creating Custom Reports, you may consider the following:

- Ask, “What do you want to capture in the Custom Report?”
- Break down your question into simple, actionable steps to help guide your process.
- Begin with testing "selected fields" first.
    - Selected fields are the list of questions in the online form that you want to include in the report.

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- Ask, “Which data points will help me verify the data I matched to?". These pieces of data may be helpful to include in “selected fields”.
- Run the report after each revision to verify the responses in your query.
- Have the Dataset open in NIRS in a different browser (e.g., Chrome, Firefox, Microsoft Edge) to compare the form questions with the selected fields/selection criteria and ensure the options are accurate.
- Lastly, Custom Reports take practice.

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.

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