Table of Contents

5.0 Projects Dataset - Disclaimer 2
5.1 Overview of the Projects Dataset 2
5.2 Adding New Project Records 5
5.3 Managing Existing Project Records 13
5.4 Overview of the “Advanced Search” function in the Projects Dataset 15
5.5 Managing “Core” Grants in the Projects Dataset 19
5.6 Apportioning Project Records Across Multiple Years 22
5.7 Utilizing the “Save as New” function in the Projects Dataset 26
5.8 Overview of Standard Reports in the Projects Dataset 28
5.9 Overview of Custom Reports in the Projects Dataset 31

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5.0 Projects 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.

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

5.1 Overview of the Projects Dataset

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

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

The Projects Dataset captures funding and collaboration efforts that your Center/Program is engaged in for each reporting period. Centers/Programs should record all funding sources, not just funding from federal agencies, e.g., Maternal and Child Health Bureau, MCHB, of the Health Resources and Services Administration, HRSA, and the Office of Intellectual and Developmental Disabilities, OIDD, of the Administration on Community Living, ACL.

Reporting of financial information is important to UCEDDs reporting to ACL, as it was written into the United States Constitution with the enactment of the Developmental Disabilities and Bill of Rights Acts, or DD Act, in October of the year 2000. As such, UCEDDs are expected to be entrepreneurial in nature by applying for financial support at all levels to support their work to enhance the lives of people with disabilities.

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If you are interested to learn more, you can find a copy of the DD Act by going to www.aucd.org/urc, and click on the option to view the "DD Act" under the "About" section.

UCEDDs are required to report the type of funding, e.g., grant, contract, etc., the total amount of funds leveraged, and the source of funding across federal, state, local, and other funding sources on an annual basis.

Please note that LEND Programs are not required to enter financial information into the Projects Dataset to satisfy requirements from MCHB. LEND programs may choose to enter financial information in the Projects Dataset, which includes several tools designed to support LEND reporting needs. Information entered in the Projects Dataset is not shared directly from NIRS.

Many new data coordinators find it helpful to review the Center or Program's 5-year work plan alongside a detailed list of projects and funding sources. This will provide a clearer understanding of the various initiatives and projects at your Center/Program.

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

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 Projects Dataset.

Please also note that Project records entered in the Projects Dataset are searchable via the NIRS Public Search on the AUCD Website.

The Projects Dataset is only viewable to users who have appropriate NIRS login credentials with access to the Projects Dataset.

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

1) A NIRS Administrator should log in to the NIRS application via aucd.org, click on the "About" Section, and select "NIRS Login".

2) Ensure that you are on the correct login page.
   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) First, a NIRS Administrator should go to the Admin section. Under the right-hand column, select "Manage NIRS Users Login". Find the faculty or staff person's name on the list.

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

5) Select the "Projects" checkbox for the "Datasets" field. Save the page.

The steps will allow the NIRS user to have access to the Projects Dataset on the navigation menu the next time they log into the system.

If you were granted permission to the Projects Dataset, you may hover your cursor over the Projects Dataset to bring down a menu. It is organized similarly to other Datasets in NIRS. If you click on the Projects Dataset at the top of the page, you will see a drop-down with two columns. On the left side, you will see options to:

- add new Project records, and
- manage existing Projects.

On the right side, you will see:

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- Standard Reports, which contain pre-populated data that may answer commonly requested queries. These reports may be especially helpful to LEND, LEAH, and DBP Programs reporting to MCHB.
- Custom Reports, which you could use to build custom queries for information that may not be included in Standard Reports.
- An Advanced Search function which allows you to quickly and easily search for records in specific year(s) or with specific keyword(s) in the title or brief description.

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

- Data Dictionary, which is a valuable resource that includes definitions for each field on the Projects Dataset form.
- Advanced Search, which allows you to search across all records submitted to the Projects Dataset.
- Search Bar, which enables you to filter and view records for selected year(s).

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.

5.2 Adding New Project Records

Welcome to the video of the "Projects Dataset" section of the NIRS Learning Modules titled “Adding New Project Records”. This video will discuss the topic of “Cost Share” and demonstrate how to add new Project records in the Projects Dataset and walk through each field on the form.

The Projects Dataset is used by Centers/Programs to report financial opportunities and funding collaborations with partners that support the work to enhance the lives of people with disabilities across various initiatives.

NIRS users with access to the Projects Dataset have access to add new project records and manage those records. If you have access to the

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Projects Dataset, you will see that it is viewable in the navigation menu at the top of the page when logged into NIRS.

Before jumping into adding a new Project record, we will define the concept of “Cost share” or “Matching”. All project records entered in the Projects Dataset must have the cost share amount entered in the financial information for the current reporting period.

“Cost Share” or “Matching” refers to the projected financial commitments of non-federal resources. The cost-share amount is typically outlined in the grant agreement.

For example, the UCEDD Core Grant from ACL funds no more than 75 percent of the project’s total cost. Thus, the cost share amount equals the remaining 25 percent covered by the UCEDD through non-federal sources.

In another example, if the UCEDD contributes one dollar toward the grant’s total cost for every three dollars awarded in Federal Funding, then the one dollar contributed by the UCEDD is considered the cost-share amount.

Note that not all funding sources have cost share requirements. If there is not a cost share amount listed, then simply enter the amount provided through the funding source.

Please note that LEND Programs are not required to enter financial information into the Projects Dataset to satisfy requirements from MCHB. LEND programs may choose to enter financial information in the Projects Dataset, which includes several tools designed to support LEND reporting needs. Information entered in the Projects Dataset is not shared directly from NIRS.

Before adding new project records to the Projects Dataset, you should check to ensure that a record has not already been started. This will help to decrease duplicate data entry.

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In the Projects Dataset, click the “Advanced Search” option in the navigation menu. Alternatively, at the top right-hand side of the page, you will see a search bar to Quick search for all Project records within specific year(s), an option to go to the Advanced Search, and the data dictionary.

Advanced search gives you more criteria to search on. You may search for the Project record by title to find duplicates. To do so, follow these steps:

- For “Fiscal Year(s)”, enter the current year of data collection. In this case, it is 2026.
- Leave the “Keywords” blank.
- For selection criteria, select “PROJECT Project title (T)”. “PROJECTS” in capital letters means that the field is from the Projects Dataset, the field header is “Project Title”, and it is a text field.

  Next, select “Like” from the comparator drop-down box. This option will return results if it follows a pattern, regardless of spelling.

  Then, enter the title of the project record in the text box provided and click “Search.”

1) If you receive results, you should click on the three dots under the ”manage” column and review the record’s contents.

2) If you do not receive results, you should go to the Projects Dataset and select “Add Project” to add a new record. This will take you to the online form to enter data associated with the funding opportunity.

Please keep in mind that required fields are indicated with an asterisk (*) in the online form. Once all required fields are completed, you may save the form.

On the page, you will see the following:

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- "Program type": the Program type allows you to indicate which Program you are reporting the record for. You must select this field for co-located UCEDD + LEND Programs for each record.

  The "Program Type" field will be automatically provided for UCEDD-only, LEND-only, DBP, and LEAH Programs.

  Please be mindful, as financial information with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Projects Dataset intended to assist in reporting to MCHB.

  Records with "UCEDD" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Projects Dataset, the UCEDD Annual Program Performance Report (PPR), and the 5-Year Closeout Report, which are intended for reporting to ACL.

- The "Fiscal Year": This field will also be automatically provided to indicate the current year of data collection. Project records can only be entered into the current year of data collection.

- A unique "Title" for each Project record should be provided for each project record. You will need to reference Project records in other Datasets in NIRS, so provide a title that will make it easily identifiable.

- A "Project Abbreviation" which may be text, numbers, or a combination of both, if applicable.

- The "Project Code", such as the grant number provided from the funder.

- The Brief Description, which should include the project's need, overall goals/objectives, unique features, and expected benefits in 500 words or less.

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- The point of “Contact” for the Project, such as the principal investigator or project manager.

  If you do not see a name on the list, you have two options. First, save the Project record before leaving the screen:

  1) If the faculty member has a profile, navigate to the Directory Dataset and select "Manage Faculty/Staff Profiles". The status option field in the user’s profile controls how the person is listed in the Network Member Directory, "Ordering Name" field in the Products Dataset, and "Contacts" field in the Projects Dataset. This option will work if they are on the list and their display status is “Display” in Online Directory or “Do Not Display” in Online Directory.

  2) Alternatively, the faculty/staff person needs to create a profile. Adding new directory profiles is also discussed in depth in the Network Member Directory section of the Learning Modules.

- The “Funding Start” and “Funding End Date” should be provided for the entire life of the funding opportunity.

- You can indicate the “Total Funding” amount awarded across the entire life of the funding opportunity.

- The “Type of Funding”, such as if it is a grant, contract, cooperative agreement, university support, fee, or per capita reimbursement, in-kind contribution, and an option to specify if the options provided do not match the type of funding.

- The “Funding Amount” awarded in the current year of data collection, from July 1 to June 30. This question is separated into four sections, Federal, State, Local, and Other funding sources. You should click on the highlighted section in blue to jump to it on the page and enter the

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funding amount in the applicable category. The amounts will be automatically totaled based on the responses provided in the funding amounts on the form. You will find there are many options, and options to specify if one is not already provided.

For example, if you received a grant from the Department of Education and matching from your University, you would click on "Federal" to jump to the federal funding sources section, enter the amount next to the "Department of Education", click on the blue "Back to Main Form" button highlighted in blue, and then click on the "Other" funding sources to enter the cost share or matching amount awarded under the "University" category.

- You can also indicate the "Type of Activities" or initiatives that the funding opportunity is supporting, such as supporting advocacy efforts, capacity building through strengthening communities, and system change by modifying programs, policies, services, or funding streams.

- The term "Core Function" originates from the Developmental Disabilities Act and Bill of Rights Act, or DD Act. This option allows you to search by various contexts, such as
    - Interdisciplinary Preservice Preparation, or training efforts for trainees,
    - Continuing Education/Community Training, or continuing education for professionals and training for community members,
    - Technical Assistance, or direct problem-solving or consultation initiatives,
    - Direct Clinical Services, or clinical and specialized services for people with disabilities,
    - Other Direct/Model Services, or adaptation of community services or other forms of assistance for people with disabilities, and

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- Demonstration Services, or piloting of exemplary or innovative practices within the Center's state.
- Performing Research or Evaluation, or research or evaluation initiatives,
- Product Development and Information dissemination, or development of deliverables or distribution of knowledge or information,

- For "Area of Emphasis": You can specify topic areas for Projects, such as Projects that support people with disabilities in quality assurance or improving consumer or family-centered systems of care, education to maximize access and learning potential for people with disabilities in schools, access of childcare services, support of healthcare services, employment for people with disabilities, housing and housing supports, transportation, and accessibility of social, recreational, and leisure activities. There is also a section for areas of emphasis not included in the DD Act, though, that are included in the UCEDD Notice of Funding Opportunity, such as improving the quality of life for people with disabilities, assistive technology devices, and leadership in all spaces of society and the workforce.

- For "Target Audience": This option allows you to specify the groups of people that the project is intended to reach.

- For "Unserved or Underserved Population(s)": You may specify Projects that work with demographic populations historically impacted by adverse health outcomes.

- The "Agencies Collaborating on the Work of the Project" allows you to identify categories of agencies, the number, and the name of collaborating partners.

  Please note that you should not enter the name of the individual supporting the work. For example, John Doe works at AUCD, so I

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would enter AUCD in the text box provided because that is the name of the agency supporting the work.

There is also an option to select "No Collaborating Agency" at the top of the field if the Project is not supporting efforts in coordination with an external partner.

There are many options, so select all that apply.

- Next, the "Consumer Participation Role" field allows you to provide information on the roles played by consumers in the development, implementation, or evaluation of the project, not in their roles (if any) as the audience of the project.

  In other words, indicate which consumers provided feedback to help create, run, or assess the Project during various stages of the work. Consumers are all recipients of the activities supported by the Project.

- For "Primary Target Audience Geographic Descriptor": This option allows you to describe the scope of the area that your project is meant to serve.

- At the bottom of the form there is also options to indicate common "Keywords". You may select a sub-keyword even if a primary keyword is not applicable. There is also an option to type in your own "Keywords" in a text box provided if the "Other" option is selected.

- "Catalog of Federal Domestic Assistance Number" (CFDA): You will see this option just below the "Add" and "Cancel" buttons. This field allows you to track federal funding tracking numbers, as provided from the federal agency that awarded the funding opportunity.

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Once you are happy with the responses on the page, click “Add” to save your responses and add the record to the Projects Dataset.

Please note that if you select “Cancel” your responses will not be saved, and you will need to enter responses manually again.

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.

5.3 Managing Existing Project Records

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

Please note that only users with access to the “Projects” Dataset can access it.

Existing Project records can be accessed by clicking on the Projects Dataset and selecting “Manage Projects” in the navigation menu. 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.

On the page, you will see:

- The title of the Project, highlighted in blue. If you click on the title it will take you to a “view only” screen, where you can review the record without editing it.
- The type of activity, which lists if the project supports advocacy, capacity building to strengthen communities, and/or systemic change initiatives.
- The Project Code

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- The date that the record was created and last edited.

To manage existing Project records, click on the three dots under the "Manage" column next to record. You will see options:

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

Project records can only be edited within the current year of data collection. Prior year records are locked for editing on August 1 of each year.

To update an existing project record, you should select the "Edit" option. This will take you to a form where you can edit existing responses.

You should review the responses provided to ensure that they are complete and accurate. Make any changes to the form and then save the page.

For example, if you need to update financial information for the record, you should scroll down to the Funding amount field, click on the applicable funding source, and update the financial information on the form.

Be sure to save the page once you have completed the desired edits. If you would like to revert any changes, you should select the "Cancel" option instead.

That is all that you need to do to edit an existing record within the current year of data collection.

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5.4 Overview of the “Advanced Search” function in the Projects Dataset

Welcome to the video of the "Projects Dataset" section of the NIRS Learning Modules titled “Overview of the “Advanced Search” Function in the Projects Dataset”. This video will provide an overview of the “Advanced Search” function in NIRS and its purpose and walk through searching across records in the Projects 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 locate records with a specific title, which may be helpful when entering new records to eliminate duplicate data entry,
- To search for records with specific keywords or projects that support specific initiatives, and
- To locate records associated with specific faculty or staff who oversee the Project in the “Contact” field.
- To identify records that receive funding from a specific agency.

To get to the Advanced Search in the Projects Dataset, log in to NIRS. In the navigation bar at the top of the screen, click on the Projects 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.

Going down the page, you will see search options:

- The “Fiscal Year(s)” option allows you to select multiple years of data you want included in the results. The current year of data collection may be selected.

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To select multiple years, you can click the "fiscal year(s)" drop-down menu and 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 "Keywords" option is a text box. The "Keywords" will search for all mentions of a phrase or word as listed in the Project record's "title" or "brief description" fields.

- Below the "Funding Sources" are "Selection criteria". "Selection Criteria" allows you to refine your search 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 Advanced Search has 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:

        i) In capital letters, you will see the form that the field originates from.

        "CONTACT" means that it originates from the Directory Dataset form, and "PROJECT" means that it originates from the Projects Dataset form.

        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)"

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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 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.

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"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 section 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.

For example, let's say that you are interested in searching for projects that have no funding information as a data quality check in the current year of data collection. You should use the "Current FY Funding (N)" field to identify these Projects.

- For "Fiscal year(s)" select only the current year of data collection. In this case, you will click on the "X" button to remove "All Years" and select "2026" from the drop-down box.
- You will leave "Keywords" blank.
- In the "Selection Criteria", there are three portions. In the first box, you need to identify the field. You also know that the "Funding type" field is in the Projects Dataset form. As you scroll through the options, you will find one listed "PROJECTS Current FY Funding (N)", which means that it is from the Projects Dataset, the field is called "Current FY Funding", and it is a numeric field.
- In the comparator, select "blank" to identify any records that have no funding information provided.
- In the last field, leave the box blank.

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- Click “Search” highlighted in blue at the bottom of the page to find 2026 records that may need to be reviewed.

If you find a matching project record, you can simply click the title to view it. You can also copy and paste search results by pressing CTRL + A on your keyboard to select all results, then CTRL + C to copy the results to your clipboard. In an Excel spread sheet, click into cell A1 and press CTRL + V to paste the results.

As a general rule of thumb, try to 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 Projects form 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.

5.5 Managing “Core” Grants in the Projects Dataset

Welcome to the video of the "Projects Dataset" section of the NIRS Learning Modules titled “Managing Core Grants in the Projects Dataset”. This video will discuss how Centers/Programs should enter their grant funding in NIRS, which are awarded from the Maternal and Child Health Bureau (MCHB) of the Health Resources and Services Administration (HRSA) and/or the Office of Intellectual and Developmental Disabilities (OIDD) of the Administration on Community Living (ACL).

In NIRS, go to the Projects Dataset and select “Add Project” from the navigation menu.

LEND, LEAH, and DBP Programs and UCEDD Centers receive grant funding awarded from MCHB and/or ACL annually. Many UCEDDs are also

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co-located with a LEND Program and receive grant funding from both ACL and MCHB. As referenced in the DD Act, UCEDDs are required to be entrepreneurial in acquiring additional funding beyond their core grant from ACL. As an example, a co-located UCEDD would leverage its LEND as a project.

Centers and Programs must ensure their financial information is accurately reported to the appropriate agency during data entry. A key field in this process, especially for co-located UCEDD + LEND Centers/Programs, is the first required field in the Projects Dataset called the “Program Type” field.

To clarify, all other program types, that is LEND-only, UCEDD-only, DBP, and LEAH training Programs will automatically have the “Program Type” field filled in for them when entering a record in the Projects Dataset.

Co-located UCEDD + LEND Centers/Programs must fill out the “Program Type” field for each record.

The “Program Type” field determines which agency the project record is reported to:

- Select **“**LEND” to include the record in Standard Reports intended for reporting to MCHB.
- UCEDDs report financial information to ACL in the annual UCEDD Program Performance Report (PPR) which includes financial information pulled from data entered in the Projects Dataset.

  Select “UCEDD” to include the record in Standard Reports and federal reporting, such as the UCEDD Annual Program Performance Report (PPR) and the Five-Year Closeout Report intended for ACL.

  LEND-only projects are not included in reporting to ACL.

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- You may also select both checkboxes for UCEDD + LEND if the project is intended to be included for Standard Reports to both MCHB and the PPR and Five-Year Closeout Report for ACL.

All UCEDD-only Centers must record their UCEDD core grant awarded from ACL each year as a project record entered in the Projects Dataset. The record must also include the cost share amount provided from other funding sources, such as matching funds provided by your university.

The funding amount is typically listed on Notice of Award, or NOA.

For co-located UCEDD + LEND Centers/Programs, it is essential to create two separate project records in the Projects Dataset each fiscal year to accurately reflect the grant received from both MCHB and grant funding from ACL. If applicable, both records should also include the cost share amount.

For co-located UCEDD + LEND Centers/Programs, the two required Project records are:

1. A LEND Grant project record with “Program Type” set to UCEDD and LEND.
2. A UCEDD Core Grant project record with “Program Type” set to UCEDD only or UCEDD and LEND, depending on the funding structure.

For UCEDD-only Centers, there is one required Project record: A UCEDD Core Grant project record with “Program Type” set to UCEDD only.

Please remember that the cost share or matching amount must be included in the funding totals listed in your Project records.

For example, the UCEDD Core Grant typically covers 75 percent of project costs with federal funds. The remaining 25 percent must be provided by your university as part of the grant agreement.

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Another way to think about it is that for every three dollars of federal funding spent, your university contributes one dollar. That one dollar is the cost share amount and should be included in the Project record.

Not all projects will have cost-share requirements. Be sure to adjust your data entry accordingly based on the funding source and notice of award.

Keep in mind that LEND programs may choose to enter financial information in the Projects Dataset, which includes several tools designed to support LEND reporting needs. Information entered in the Projects Dataset is not shared directly from NIRS.

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

5.6 Apportioning Project Records Across Multiple Years

Welcome to the video of the "Projects Dataset" section of the NIRS Learning Modules titled "Apportioning Project Records Across Multiple Years". This video will discuss apportioning Project records from the perspective of funding sources that are awarded across multiple years of data collection.

Firstly, what does apportioning projects mean?

All federal reporting data across all Datasets must be entered in NIRS from July 1 to June 30 of each year. Programs should ensure that data is entered within this timeframe when submitting records in NIRS. Thus, all project records entered in the Projects Dataset must be entered within this time frame.

It is common that funding opportunities are not awarded by the funder within the same time frame. Additionally, many funding opportunities span across multiple fiscal year(s).

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Apportioning is a process of allocating funds within the June 30 – July 1 timeframe, regardless of whether the funding is awarded within a different time frame.

For example, a grant with a lifespan across five (5) fiscal years that was awarded July 1, 2026, would continue through June 30, 2031.

This would span five years because:

- FY 2027 = July 1, 2026 – June 30, 2027
- FY 2028 = July 1, 2027 – June 30, 2028
- FY 2029 = July 1, 2028 – June 30, 2029
- FY 2030 = July 1, 2029 – June 30, 2030
- FY 2031 = July 1, 2030 – June 30, 2031

To ensure accurate reporting of the funding opportunity, there should be a total of five (5) project records entered into NIRS, one for each fiscal year.

As such, Centers/Programs have two options when entering project records in the Projects Dataset:

1) You may elect to report the total funding amount in each of the July 1 - June 30 reporting periods, during which funding is disbursed on a specific date, e.g., October 1, even if the funding spills over into additional fiscal years (or reporting periods), or

2) You may pro-rate the figures to reflect the funds captured in each of the July 1 - June 30 reporting periods.

Centers/Programs should enter project records consistently, as long as they reflect one of the two options.

Let's practice entering a multi-year project record in NIRS on the following example.

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A project is funded over three years with funding disbursed each year on October 1, and a start date of October 1 of the current reporting cycle.

Before you start data entry, you may want to write the years it spans to better visualize data entry.

For example, a grant awarded for $1 million, which spans October 1, 2026, through September 30, 2029, or three years, would span four (4) fiscal years:

- FY 2027, with the start date of October 1, 2026, through the end of the fiscal year, June 30, 2027,
- FY 2028, starting on July 1, 2027, and ending June 30, 2028,
- FY 2029, July 1, 2028, through June 30, 2029, and
- FY 2030, starting July 1, 2030, through the end of the grant on September 30, 2030.

After establishing the years of data entry, you should decide which option your Center/Program will use to enter projects. As just mentioned, there are two options: 1) elect to report the total funding across each year of the grant, or 2) prorate funding within the July 1 – June 30 timeframe.

In the example, you will prorate the funding.

In NIRS, go to the Projects Dataset and select “Add Project”.

Going on down the Projects Dataset form:

- If you are a co-located UCEDD + LEND Center/Program, you should select the program type. For the example, I will select “UCEDD” only.
- Provide a unique title for the project record.
- Supply the Project abbreviation and Project code, if applicable.
- Provide a brief description, similar to an abstract, including information such as the need, overall goals and objectives, project features, and expected benefits.

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- Identify a contact person, such as the Principal Investigator (PI) of the project.
- For the Funding start and end date, enter October 1, 2026, and September 30, 2029.
- In the total funding, identify that it is $1 million in funding across the entire life of the grant.
- In the following field, Funding Type, select the check box for “Grant”.
- Let’s say that this is a federal grant from the Department of Justice. Click on “Federal” to jump to the federal funding section and locate “DOJ”.

  As we are prorating the funding of a $1 million grant, and there are four fiscal years that the grant will be reported, divide $1 million by four (4). Enter $250,000 in the “DOJ” option. Scroll down further and select the “Back to Main Form” button highlighted in blue. The current FY funding field will be automatically updated to reflect the amount provided.

- Identify the “Type of Activity” supported by the project through advocacy, capacity building, and/or systemic change.
- Identify the types of “Core Functions”, followed by the “Area of Emphasis”, “Target Audience”, “Unserved or Underserved Populations” that the project will support.
- Next, provide the collaborating agency(s), the number of agencies in each category, and the agency's name that will support the project initiatives.
- Lastly, identify the role of participants as consumers in the following box, the scope of the project in the “Primary Target Audience Geographic Descriptor” field, and any “Keywords” that best fit.

Once all selections are complete, save the record.

You will then repeat this same process for each fiscal year for the life of the project.

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Please keep in mind that data entry can only be completed for the current year of data collection.

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5.7 Utilizing the "Save as New" function in the Projects Dataset

Welcome to the video of the "Projects Dataset" section of the NIRS Learning Modules titled "Utilizing the "Save as New" function in the Projects Dataset". This video will discuss the purposes of the "Save as New" function and demonstrate how to bring a record from a prior year into the current year of data collection.

The "Save as New" function in the Projects Dataset in NIRS allows you to create a copy of an existing project record with fields automatically pre-filled based on the original.

This feature can be best used in two scenarios:

1) It is especially useful when carrying forward project records from a previous year into the current reporting cycle. Copying prefilled fields from a prior year's project record streamlines data entry by preserving form selections such as funding sources that extend across multiple years.

2) You can also create a copy of a project record in the current reporting cycle. This may be helpful when using similar data fields across projects. The new record will be saved in the current year of data collection.

We will cover the first option and then move on to the second.

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In the first option, let's demonstrate how to use the "Save as New" function in an example of bringing forward a prior year project into the current reporting cycle.

To access the "Save as New" function, go to the Projects Dataset and select "Manage Projects" from the navigation bar.

At the top of the page, there is a "Select Years" search bar. Enter the desired year. In the example, we will go to the previous year of data collection, which happens to be 2025, and click "Search".

Find the project from the list of records. Click on the three dots under the "Manage" column and select "View". This will take you to a version of the form where you cannot edit responses.

At the top of the page, click on the option highlighted in green, "Save as New". This will copy responses from the original form, where responses will be prefilled for you. Please keep in mind that all records created with the "Save as New" function will be created in the current year of data collection.

You should review the form thoroughly and ensure that all selections are up to date based on the current year of data collection, including start and end dates, collaborators, funding amounts for the current fiscal year, and so on. You should also be sure to update the record's title and ensure that it is unique and easily identifiable, as you will need to refer to it later in other areas of NIRS.

In the second option, we will demonstrate how to create a copy of a record in the current year of data collection.

The process is very similar.

In the Projects Dataset, select "Manage Projects". This will show you a list of all project records entered into the Projects Dataset in the current year of data collection. Find the record in the list.

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Click on the three dots under the “Manage” column and select “View”.

At the top of the page, you will now see three options: 1) “Save as New”, 2) “Edit”, and 3) “Delete”.

Selecting “Save as New” will bring you to the form to update responses. Again, you should ensure that all fields are updated accordingly, and the title is unique and easily identifiable. Save the page once all changes have been completed.

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.

5.8 Overview of Standard Reports in the Projects Dataset

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

NIRS offers many helpful tools to provide data to government agencies and answer internal questions for your Center/Program. Standard Reports in the Projects Dataset contain pre-populated reports based on the data entered in NIRS.

To access the reports, you need to have NIRS Administrator access to the “Projects” Dataset. In the Projects 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

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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 of the data on the page that displays report results.

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

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

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 from the spreadsheet as well, so that I can filter by field headers or upload it to an analytical software such as REDCap, SAS, SPSS, STATA, or R.

Examples of Standard Reports for the Projects Dataset include:

- 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 Projects Dataset. If successful, the record will no longer be listed.

- Project Funding Amounts, which lists all project funding across all funding categories.

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- Projects and Associated Activity Records, which allows you to view the total number of participants and number of hours supported by each project, as indicated in records in the primary and secondary affiliated project fields in the Activities Dataset form.

- Funds Leveraged, which is especially helpful to UCEDDs reviewing their UCEDD Annual Program Performance report (PPR), as this report provides a breakdown in the same format that is provided in Part 2 on Leveraging.

  UCEDDs may want to select the check box for “OIDD Funds Leveraged” which will exclude LEND-only project records. LEND-only funding is not included in reporting to ACL.

- Projects by Consumer Participation allows you to view the number of project records by consumer participation in the project's planning, implementation, and assessment.

- Projects by Area of Emphasis and Funding Type, which provides the number of project grants, contracts, cooperative agreements, university support, fees/per capita reimbursements, in-kind contributions, and other funding types that support each area of emphasis.

- Projects by Area of Emphasis and Type of Action, which provides the number of projects within each area of emphasis that support advocacy, capacity building, and system change initiatives.

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

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5.9 Overview of Custom Reports in the Projects Dataset

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

Custom Reports can be used to create reports across 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 Projects 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 Projects Dataset by clicking on the Projects Dataset and selecting “Custom Reports” under the right-hand column in the navigation menu.

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

Going down the page, will you 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 do not have one. 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.

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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,
- 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 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 records have the same response in the selected field, they will be removed from the results, and
  - “Full Memos” will expand all text boxes.

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- "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.

  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 lists 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.

     "CONTACT" means that it originates from the Directory Dataset form, and "PROJECT" means that it originates from the

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Projects Dataset form.

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

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(“>>”), or remove the field from the sorting by clicking on the left-pointed double arrow (“<<”).

- 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 create a Custom Report. Let’s say that you are interested in all total funding information completed at your Centers/Programs from 2008 to the present day that is connected to Alzheimer’s initiatives.

- In the “Title”, you could call it “Alzheimer Initiatives 2008+”
- I will keep the “Default” set to “Browse” because I prefer to view results in an internet web-browser.
- For “Category”, you could enter “Alzheimer Projects”.
- For “Notes”, leave a brief note on the purposes of the Custom Report.
- For “Selected fields”, these are the fields from the online form. There are four fields that I am interested in, 1) the title of the project, 2) the project’s brief description, 3) the contact person for the project if I need to reach out to them, and 4) the total funding for the project.

  For the first two fields and the last one, I know that the field is listed in the Projects Dataset form, so I am looking for selected fields with “PROJECT” listed in capital letters. The “Contact” field is provided from the Directory Dataset, so I will look for “CONTACT” in capital letters for that one.

  The first field is listed “PROJECT Project Title (T)”, meaning that it is from the Projects Dataset form, the header of the projects field is “Title”, and it is a text field.

  Click on it and move it into the left column.

  From there, I will do the same for the remainder of the fields:

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"PROJECT Project Desc (T)", "CONTACT ContactID (N)", and "PROJECT Project FY Funding (N)".

- For "Selection Criteria", we are interested in projects that support Alzheimer's initiatives from 2008 to present. We will need two criteria to do this.

  First, we need to refine the year(s) we are searching for. Then, we need to search for Alzheimer's initiatives, which we can choose to do either in the project title or in the brief description. For example, I will use the project title.

  For the first criteria, select "PROJECT Fiscal Year (N)" in the first box, "greater than or equal to" in the second box, and type in "2008" to specify that you want to receive only records from 2008 and onward.

  In the second criterion, select "PROJECT Project Title (T)" in the first box, "like" in the second box, and type in "Alzheimer" in the third box.

- 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 that a new "Alzheimer's Initiatives" 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 on the "Present Results In" to select a different method to view the results. Click on the three dots under the manage column and select "Run Report" to run the report in this way.

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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 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.
- 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!

AUCD is here to help if you get stuck.

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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