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6.0 Activities 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.

6.1 Overview of the Activities Dataset and Core Functions

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

What is the Activities Dataset, and what kind of data is recorded in it?

Activities are the individual events or discrete processes, pursuits, or functions of a project. Activities are often time-delineated and measurable. Data collected in the Activities Dataset is linked to projects identified in the Projects Dataset. In contrast, the Projects Dataset intends to record information on funding opportunities and collaborations encompassing multiple activities.

Activity-level reporting can further be distinguished from project-level reporting in that activity records focus more on the work's impact (e.g., the number of students trained). This contrasts with project-level reporting that focuses on infrastructure.

NIRS allows Centers and Programs to manage information on the activities performed for each project. Data collected in the Activities Dataset is linked to specific projects identified in the Projects Dataset. To attach a Project

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record to an activity, you must first create a Project record in the Projects Dataset.

Descriptive information about each activity is collected in the Activities Dataset, including:

- The core function that best describes the activity,
- The type of activity,
- The area of emphasis the activity addresses,
- Numbers, types, and demographics of activity participants,
- Collaborators on the activity,
- Projects the activities are affiliated with, and
- Duration and dates of the activity.

Another question that you might ask is what is a “core function”?

The term “core function” originated from the Developmental Disabilities Assistance and Bill of Rights Act (DD Act). The DD Act authorized a network of university-based, disability-focused Centers known as University Centers for Excellence in Developmental Disabilities (UCEDDs) to support people with disabilities across the lifespan.

Core functions define the key areas in which these Centers or Programs operate to enhance the lives of people with disabilities.

The National Information Reporting System (NIRS) was developed to meet the requirements set by federal funders. NIRS includes eight core functions in the Activities Dataset:

- Continuing Education/Community Training
- Demonstration Services
- Direct Clinical Services/Model Services
- Interdisciplinary Preservice Preparation
- Other Direct/Model Services
- Performing Research or Evaluation
- Product Development and Information Dissemination

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- Technical Assistance

NIRS resources helpful to the Activities Dataset 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 Resources for OIDD-funded Programs”. Next, click on “Support of OIDD-funded Programs”. You will find the “UCEDD Logic Model” and the “UCEDD PPR Template” on the page, both of which provide details on reporting requirements within each of the Activity core functions for UCEDDs.

The data dictionary can also be found at the top right of each page in the NIRS. It is especially helpful for getting started as it lists definitions for each field in more depth and provides examples for each core function. You should check the definitions of core functions in the data dictionary annually, as changes in the definitions can occur year to year.

Now that we have discussed the general purposes of the Activities 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 Activities Dataset.

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

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

1) Log in to the NIRS application by going to 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.

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3) First, 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 "Activities" checkbox for the "Datasets" field. Save the page.

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

Hover your cursor over the Activities Dataset to bring down a menu. It is organized similarly to other Datasets in NIRS. If you click on the Activities 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 Activity records,
- Manage existing Activity records, and

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.
- 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 Activities Dataset:

- Data Dictionary, which is a valuable resource that includes definitions for each field and examples for every activity core function.

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- Advanced Search, which allows you to search across all activity records submitted to the Activities 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.

6.2 Adding New Records with Activity Core Function “Continuing Education/Community Training“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Continuing Education/Community Training”. This video will demonstrate how to create a new and edit an existing activity record with core function “Continuing Education/Community Training”.

Continuing Education helps professionals to maintain skills and credentials. Continuing education also helps professionals stay current on information to better help people with disabilities and maintain professional licenses through credits or a certificate of completion.

Community training helps people in the community learn more, though does not offer continuing education or a certificate of completion to advance a career. Community Services may be offered to people with disabilities, families, professionals, students, and so on.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

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On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Continuing Education/Community Training”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Continuing Education/Community Training fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

  Records with “UCEDD” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset, the

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UCEDD Annual Program Performance Report (PPR), and the 5-Year Closeout Report, which are intended for reporting to ACL.

You will also note that questions will differ based on your selection for the "Program Type" field. For example, some fields will be required when selecting "UCEDD + LEND" that are not required when selecting "UCEDD-only".

You can also view the interaction for the "Program Type" field in the Data Dictionary.

Select the applicable program type(s). Click the "Save and Continue" button in blue to go to the next page. Select "Cancel" to return to the "Add Activity" screen.

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

- Activity "Core Function", based on your selections in the prior screen, e.g., "Continuing Education/Community Training".

- A unique "Title" for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  This field is displayed and required for all program types.

- You can also provide a "Brief Description", similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

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This field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

This field is displayed and optional for all program types.

- The "Primary Target Audience" to indicate the intended scope or geographic/demographic audience for the activity. For example, does it target local individuals, title v populations, tribal groups, and so on.

  This field is displayed and required for all program types.

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- "Training Method" to capture the mechanism used for training. For example, if it was a seminar, workshop, audio or video conference, in-person/live course, and so on. When selecting the "other" option, you must provide a description in the text box provided.

  This field is displayed and required for all program types.

- "Is it Provided in person, distance, or virtual?" to indicate if the training was offered in person, virtually, or both.

  This field is displayed and required for all program types.

- Select "Are continuing education credits offered?" if continuing education credits are offered with the activity.

  This field is displayed and required for program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Are certificates of completion or CEUs or their equivalents offered?"

  Activities will be categorized as Continuing Education or Community Training based on the response to this question (Core Function Continuing Education/Community Training only).
  - Select "Yes" for Continuing Education
  - Select "No" for Community Training

  This field is displayed for all program types and required for forms with program type(s) UCEDD + LEND or UCEDD-only.

- The "Type of Activity" field allows you to indicate how the activity enhances communities. You can select one of the options:

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Advocacy, or active support for a program, initiative, or change.
Capacity building, or strengthening local, state, regional, and national communities.
Systemic change, or modifying entire programs, policies, services, and/or funding streams.

This field is displayed and required for all program types.

- For “Area of Emphasis”, You can specify topic areas for Activities, such as Activities 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.

  This field is displayed and required for all program types.

- “Types and Numbers of Participants” allows you to enter the number of people within each category that were participants in the activity.

  You will be asked for the unduplicated number of participants across various categories, such as trainees, other classroom students, professionals and para-professionals, caregivers, adults with disabilities, legislature/policy makers, community members, and partners that participated as participants.

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A total participants category will automatically calculate the number of participants across all categories.

You must provide the number of unduplicated participants across all categories. A single participant should not be counted more than once in more than one category.

For example, a trainee might also be an adult with a disability. You should count them only once under their primary role in participating in the activity. So, if they were there as a person with a disability, count them only once in the "Adults with Disabilities" category.

This field is displayed and required for all program types.

- You should select "Yes" to the question on "Did the activity provide training and workforce development through a Degree, Certification, or Formal Course?" if the activity supported the workforce through a degree, certificate, or formal course.

  Degree, Certification, or Formal Course refers to training provided through a standard curriculum that may result in a degree or certification. Post-graduates and early research investigators are also included, even though they will not receive a degree or certificate. Also included are individuals that receive a portion of the curriculum but do not complete all of the curriculum or receive a degree or certificate.

  You will note that additional fields appear when selecting "yes" which are required.

  This field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

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- "Trainee Type reached" where you can indicate the type of trainees who have been reached because of workforce development activity through a degree, certificate, or formal course by the activity, for example, undergraduate, graduate, or post-graduate students. Non-degree seeking individuals is also an option for those who are not students. When selecting the "other" option, you must provide a description.

  The field will be displayed if you select "Yes" to the question "Did the activity provide training and workforce development through a Degree, Certification, or Formal Course?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Training focus", to indicate the focus area(s) of the workforce development activity through a degree, certificate, or formal course. Examples include clinical care, care support/allied health, public health, and so on. When selecting the "other" option, you must provide a description.

  The field will be displayed if you select "Yes" to the question "Did the activity provide training and workforce development through a Degree, Certification, or Formal Course?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Provide the number of participants in the activity for Degree, Certification, or Formal Course", to provide the number of participants who participated in the activity for a degree, certification, or formal course. There is also a clickable link to view the definition.

  The field will be displayed if you select "Yes" to the question "Did the activity provide training and workforce development through a

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Degree, Certification, or Formal Course?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Did the activity provide training and workforce development through Continuing Education?" to indicate if the activity provided training and workforce development through Continuing Education.

  This field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Continuing Education Participant Type reached" to select the focus area(s) of the workforce development activity through continuing education. Examples include clinical care providers, care support providers, researchers, public health professionals, or community-based participants. When selecting the "other" option, you must provide a description.

  The field will be displayed if you select "Yes" to the question "Did the activity provide training and workforce development through Continuing Education?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Provide the number of participants in the activity for Continuing Education" to provide the number of participants who engaged in the workforce development activity through continuing education.

  The field will be displayed if you select "Yes" to the question "Did the activity provide training and workforce development through Continuing Education?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

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- Select “Yes” if the activity engaged family member(s) or person(s) with personal experience in the next question “Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?”. Note that additional fields will display on the form.

  This field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the “Engagement Area”, you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the “read definition” linked in blue under each column header.

  The field will be displayed if you select “Yes” to the question “Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?”. This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

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- For the field, “Were the Persons with Personal Experience from any of the following population categories?” you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select “Yes” to the question “Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?”. This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The “Was the Center the lead on the activity?” field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select “yes”.

  UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

  If selecting “Yes” you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- “Customer Satisfaction Measures” or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

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Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants “I am satisfied with the knowledge and skills gained from the training” with options within the 4-point Likert scale.

"Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be considered consumers. Additionally, consumers can be any recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants’ knowledge, skills, attitudes, health, and so on were impacted.

A total category will automatically calculate the number of participants across all 4-point Likert response categories.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected “No” to the question “Was the Center the lead on the activity?”. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- “Initial Outcome Measures” are intended to capture how the participants’ knowledge, skills, attitudes, health, etc., were affected as a result of the activity.

  Initial Outcome Measures are required for UCEDD records. If you did not gather initial outcome measures, there is a “not applicable” check box you can select.

  Similar with the previous field on consumer satisfaction measures, the 4-point Likert scale is intentional.

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Supply the total number of people surveyed regardless and the number of people who responded within each of the 4-point Likert scale categories. A total category will automatically calculate the number of participants across all 4-point Likert response categories. For example, you might ask trainees “As a result of this training, my knowledge of… (insert training topic) has increased.”.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The “Purposes of partnerships/collaborations” field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a “not applicable” check box if your Center/Program did not collaborate with other agencies on the activity.

  This field is displayed and required for all program types.

- “Primary Agency Collaboration on the Work of the Activity” allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select “Tribal entities” from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

  This field is displayed and required for all program types.

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- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

  The fields are displayed for all program types.

  The field "List of Agencies" is required for all program types.

  The two fields on the "number of agencies collaborated" and "name of agency(ies) collaborated" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Subject Area" to indicate the topic(s) that were discussed in the training. If none of the options are applicable, select "None of the above".

  The field is displayed and required for forms with program type(s)

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UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Training Topic Areas" to indicate all topic areas that describe the activity. You may select a sub-topic word without also selecting the corresponding general topic area.

For example, you may select "Early Childhood - Newborn Screening" without selecting "Early Childhood - General". In addition, you may select only the general topic area if none of the sub-topic area words apply.

The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Primary Affiliated Project" lists all Project records that have been entered into the Projects Dataset for the current year of data collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

  If you do not see the project listed, you should complete data entry on the form, and then click "Add Primary Project" in blue to add a record.

  There is also a "not applicable" check box if your Center/Program did not fund the activity.

  The field is displayed and required for all program types.

- The "Secondary Affiliated Project" functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select "Add Secondary

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Project" to add a project record.

The field is displayed and optional for all program types.

- The "Duration" field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the "Date of Activity" using the format listed "MM/DD/YYYY". If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

- Select the "Recurring Activity" checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the "Recurring Activity" check box, and then update the number of hours the activity took place in the "Duration" field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function "Continuing Education/Community Training":

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1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “Total Count” column, locate the number listed for core function “Continuing Education/Community Training”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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.

6.3 Adding New Records with Activity Core Function “Demonstration Services“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Demonstration Services”. This video will demonstrate how to create a new and edit an existing activity record with core function “Demonstration Services”.

Demonstration services are services that field test exemplary practices and that can be integrated with training, research, and/or dissemination functions. Demonstration Services may include a variety of services, supports, and assistance for individuals with disabilities or special health care needs.

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

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To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for “Demonstration Services”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Demonstration Service fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Demonstration Services”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity

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such as the date, location, staff involved, topic(s) discussed, and/or what took place.

The field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- "Total number of consults, contacts, or services" to provide the total number of community-based services, consults, or contacts provided by Center or Program faculty and staff for the full reporting period (July 1 to June 30) associated with the activity.

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The field is displayed and optional for all program types.

- "Number of unduplicated individuals served" or the total number of unduplicated individuals seen during the reporting period.

  The field is displayed and optional for all program types.

- "Race of individuals served" who received the consults/contacts/services. There are several racial categories listed on the form, each with a definition. Click into each box to enter the number of individuals who identify with that category. For "American Indian or Alaska Native", there is an additional text box where you can enter the name of the tribe that the individuals receiving services are affiliated with. If an individual does not wish to self-identify, enter them in the option for "Choose not to disclose".

  The field is displayed and optional for all program types.

- "Ethnicity of individuals served" who received the consults/contacts/services. Again, there are several ethnicity categories and a text box for each. You can click into each and enter the number of people who identify with each category. There are definitions on the form. If an individual does not wish to self-identify, enter them in the option for "unrecorded".

  The field is displayed and optional for all program types.

- "Ages of Individuals served" who received the consults/contacts/services. You will see various age ranges spanning from infants to men who are 26+ years of age. This functions similarly to the previous two fields. There is also an option for "Other" and "Unknown".

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The field is displayed and optional for all program types.

- The “Type of Activity” field allows you to indicate how the activity enhances communities. You can select one of the options:

  Advocacy, or active support for a program, initiative, or change.
  Capacity building, or strengthening local, state, regional, and national communities.
  Systemic change, or modifying entire programs, policies, services, and/or funding streams.

  The field is displayed and required for all program types.

- For “Area of Emphasis”, You can specify topic areas for Activities, such as Activities 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.

  The field is displayed and required for all program types.

- Select “Yes” if the activity engaged family member(s) or person(s) with personal experience in the next question “Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?”. Note that additional fields will display on the form.

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This field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select "Yes" to the question "Did

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the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Was the Center the lead on the activity?" field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select "yes".

  UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

  If selecting "Yes" you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- "Customer Satisfaction Measures" or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

  Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants "I am satisfied with the knowledge and skills gained from the training" with options within the 4-point Likert scale.

  "Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be

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considered consumers. Additionally, consumers can be any recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants' knowledge, skills, attitudes, health, and so on were impacted.

A total category will automatically calculate the number of participants across all 4-point Likert response categories.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected "No" to the question "Was the Center the lead on the activity?". It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate with other agencies on the activity.

  This field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

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This field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

  The fields are displayed for all program types.

  The field "List of Agencies" is required for all program types.

  The two fields on the "number of agencies collaborated" and "name of agency(ies) collaborated" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Primary Affiliated Project" lists all Project records that have been entered into the Projects Dataset for the current year of data

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collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

There is also a “not applicable” check box if your Center/Program did not fund the activity.

The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.

  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

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- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Demonstration Services”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Demonstration Services”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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6.4 Adding New Records with Activity Core Function “Direct Clinical Services/Model Services“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Direct Clinical Services/Model Services”. This video will demonstrate how to create a new and edit an existing activity record with core function “Direct Clinical Services/Model Services”.

Model services are specialized services delivered with the intention to enhance the well-being and status of the recipient and not for testing new practices and may be integrated with training, research, and/or dissemination functions.

Direct services are preventive, primary, or specialty clinical services provided to families and people with disabilities. Additionally, Enabling Services are non-clinical services that enable individuals to access health care and improve health outcomes.

NIRS users with access to the Activities Dataset have access to add new and managing existing Activity records. If you have access to the Activities Dataset, you will see that it is viewable in the navigation menu at the top of the page when logged into NIRS.

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.

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- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Direct Clinical Services/Model Services”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Direct Clinical Service/Model Service fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

  You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not

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required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Direct Clinical Services/Model Services”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

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If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- "Types of direct services provided" where you should select all clinical services that were provided for the clinical activity. When selecting the "Other" option you must give a description in the text box provided.

  This field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Name of clinic" where the clinical services were provided.

  This field is displayed and optional for all program types.

- "Number of unduplicated individuals served" or the total number of unduplicated individuals seen during the reporting period.

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This field is displayed and optional for all program types.

- "Race of individuals served" who received the consults/contacts/services. There are several racial categories listed on the form, each with a definition. Click into each box to enter the number of individuals who identify with that category. For "American Indian or Alaska Native", there is an additional text box where you can enter the name of the tribe that the individuals receiving services are affiliated with. If an individual does not wish to self-identify, enter them in the option for "Choose not to disclose".

  This field is displayed and optional for all program types.

- "Ethnicity of individuals served" who received the consults/contacts/services. Again, there are several ethnicity categories and a text box for each. You can click into each and enter the number of people who identify with each category. There are definitions on the form. If an individual does not wish to self-identify, enter them in the option for "unrecorded".

  This field is displayed and optional for all program types.

- "Ages of Individuals served" who received the consults/contacts/services. You will see various age ranges spanning from infants to men who are 26+ years of age. This functions similarly to the previous two fields. There is also an option for "Other" and "Unknown".

  This field is displayed and optional for all program types.

- "Insurance" to indicate the number of people provided clinical services who have specific insurance types.

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There is also an option for people who do not wish to self-identify.

This field is displayed and optional for all program types.

- The "Type of Activity" field is unique for this core function. It will be automatically filled in with the option "Direct Service".

  The field is displayed and required for all program types.

- For "Area of Emphasis", You can specify topic areas for Activities, such as Activities 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.

  This field is displayed and required for all program types.

- Select "Yes" if the activity engaged family member(s) or person(s) with personal experience in the next question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". Note that additional fields will display on the form.

  This field is displayed for all program types and required for forms

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with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member

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AND/OR Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Was the Center the lead on the activity?" field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select "yes".

  UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

  If selecting "Yes" you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- "Customer Satisfaction Measures" or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

  Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants "I am satisfied with the knowledge and skills gained from the training" with options within the 4-point Likert scale.

  "Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be considered consumers. Additionally, consumers can be any

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recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants' knowledge, skills, attitudes, health, and so on were impacted.

A total category will automatically calculate the number of participants across all 4-point Likert response categories.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected "No" to the question "Was the Center the lead on the activity?". It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate with other agencies on the activity.

  This field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

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This field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

  The fields are displayed for all program types.

  The field "List of Agencies" is required for all program types.

  The two fields on the "number of agencies collaborated" and "name of agency(ies) collaborated" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Primary Affiliated Project" lists all Project records that have been entered into the Projects Dataset for the current year of data

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collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

There is also a “not applicable” check box if your Center/Program did not fund the activity.

The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

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- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Direct Clinical Services/Model Services”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Direct Clinical Services/Model Services”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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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6.5 Adding New Records with Activity Core Function “Interdisciplinary Preservice Preparation“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Interdisciplinary Preservice Preparation”. This video will demonstrate how to create a new and edit an existing activity record with core function “Interdisciplinary Preservice Preparation”.

Interdisciplinary Preservice Preparation is training trainees to build leadership and skills to build a stronger workforce to better support people with disabilities.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Interdisciplinary Preservice Preparation”.

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Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Interdisciplinary Preservice Preparation fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

  You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not required when selecting “UCEDD-only”.

  You can also view the interaction for the “Program Type” field in the Data Dictionary.

  Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to

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return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Interdisciplinary Preservice Preparation”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity” to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person’s name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- The “Type of Activity” field allows you to indicate how the activity enhances communities. You can select one of the options:

  Advocacy, or active support for a program, initiative, or change.
  Capacity building, or strengthening local, state, regional, and national communities.
  Systemic change, or modifying entire programs, policies, services, and/or funding streams.

  The field is displayed and required for all program types.

- Select "Yes" to the question “Was this training conducted outside the UCEDD” if the training was conducted outside the UCEDD, for example, out in the community.

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only.

- For “Area of Emphasis”, You can specify topic areas for Activities, such as Activities 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,

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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.

The field is displayed and required for all program types.

- "Types and Numbers of Participants" allows you to enter the number of people within each category that were participants in the activity. For core function interdisciplinary preservice preparation, you will note that there is a category for each trainee discipline. There is also an "Other" option with a text box to supply the applicable discipline.

  Once you have entered the number of trainees within each discipline, you will be asked for additional categories, such as trainees, other classroom students, professionals and para-professionals, caregivers, adults with disabilities, legislature/policy makers, community members, and partners that participated as participants.

  A total participants category will automatically calculate the number of participants across all categories.

  You must provide the number of unduplicated participants across all categories. A single participant should not be counted more than once in more than one category.

  For example, a social work trainee might also be an adult with a disability. You should count them only once under their primary role in participating in the activity. So, if they were there as a

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person with a disability, count them only once in the "Adults with Disabilities" category.

This field is displayed and required for all program types.

- The "Discipline of Course or Class" field allows you to indicate what the primary discipline of the course or class.

  For example, if it was a seminar focused on nursing students, you could indicate that the primary discipline is "nursing". If the course was on interdisciplinary training, such as a course on working across professional silos with professionals from a variety of capacities/disciplines present, you could indicate that the primary discipline is "interdisciplinary".

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- Select "Yes" if the activity engaged family member(s) or person(s) with personal experience in the next question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". Note that additional fields will display on the form.

  The field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

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Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Was the Center the lead on the activity?" field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select "yes".

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UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

If selecting "Yes" you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- "Customer Satisfaction Measures" or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

  Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants "I am satisfied with the knowledge and skills gained from the training" with options within the 4-point Likert scale.

  "Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be considered consumers. Additionally, consumers can be any recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants' knowledge, skills, attitudes, health, and so on were impacted.

  A total category will automatically calculate the number of participants across all 4-point Likert response categories.

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This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected "No" to the question "Was the Center the lead on the activity?". It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- "Initial Outcome Measures" are intended to capture how the participants' knowledge, skills, attitudes, health, etc., were affected as a result of the activity.

  Initial Outcome Measures are required for UCEDD records. If you did not gather initial outcome measures, there is a "not applicable" check box you can select.

  Similar with the previous field on consumer satisfaction measures, the 4-point Likert scale is intentional.

  Supply the total number of people surveyed regardless and the number of people who responded within each of the 4-point Likert scale categories. A total category will automatically calculate the number of participants across all 4-point Likert response categories. For example, you might ask trainees "As a result of this training, my knowledge of… (insert training topic) has increased.".

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate

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with other agencies on the activity.

This field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

  This field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of

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agencies, be sure to list the appropriate names of all agencies in the boxes provided.

The fields are displayed for all program types.

The field “List of Agencies” is required for all program types.

The two fields on the “number of agencies collaborated” and “name of agency(ies) collaborated” are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- “Primary Affiliated Project” lists all Project records that have been entered into the Projects Dataset for the current year of data collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

  If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

  There is also a “not applicable” check box if your Center/Program did not fund the activity.

  The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

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- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Interdisciplinary Preservice Preparation”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Interdisciplinary Preservice Preparation”. The number is zero if no records exist for the core function.

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3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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.

6.6 Adding New Records with Activity Core Function “Other Direct/Model Services“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Other Direct/Model Services”. This video will demonstrate how to create a new and edit an existing activity record with core function “Other Direct/Model Services”.

Other Direct/Model services include other forms of assistance, including special adaptation of generic community services or specialized services for individuals with developmental disabilities and their families.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

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- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Other Direct/Model Services”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Other Direct/Model Services fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

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ACL.

You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Other Direct/Model Services”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

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- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- "Types of enabling services provided" where you should select all services that were provided for the clinical activity. When selecting the "Other" option you must give a description in the text box provided.

  The field is displayed for all program types. The field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

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- "Number of unduplicated individuals served" or the total number of unduplicated individuals seen during the reporting period.

  The field is displayed and optional for all program types.

- "Race of individuals served" who received the services. There are several racial categories listed on the form, each with a definition. Click into each box to enter the number of individuals who identify with that category.
  For "American Indian or Alaska Native", there is an additional text box where you can enter the name of the tribe that the individuals receiving services are affiliated with. If an individual does not wish to self-identify, enter them in the option for "Choose not to disclose".

  The field is displayed and optional for all program types.

- "Ethnicity of individuals served" who received the services. Again, there are several ethnicity categories and a text box for each. You can click into each and enter the number of people who identify with each category. There are definitions on the form. If an individual does not wish to self-identify, enter them in the option for "unrecorded".

  The field is displayed and optional for all program types.

- "Ages of Individuals served" who received the services. You will see various age ranges spanning from infants to men who are 26+ years of age. This functions similarly to the previous two fields. There is also an option for "Other" and "Unknown".

  The field is displayed and optional for all program types.

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- "Insurance" to indicate the number of people provided clinical services who have specific insurance types.

  There is also an option for people who do not wish to self-identify.

  The field is displayed and optional for all program types.

- The "Type of Activity" field is unique for this core function. It will be automatically filled in with the option "Direct Service".

  The field is displayed and required for all program types.

- For "Area of Emphasis", You can specify topic areas for Activities, such as Activities 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.

  The field is displayed and required for all program types.

- Select "Yes" if the activity engaged family member(s) or person(s) with personal experience in the next question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". Note that additional fields will display on the form.

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The field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select "Yes" to the question "Did

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the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Was the Center the lead on the activity?" field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select "yes".

  UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

  If selecting "Yes" you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

  This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- "Customer Satisfaction Measures" or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

  Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants "I am satisfied with the knowledge and skills gained from the training" with options within the 4-point Likert scale.

  "Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be

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considered consumers. Additionally, consumers can be any recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants' knowledge, skills, attitudes, health, and so on were impacted.

A total category will automatically calculate the number of participants across all 4-point Likert response categories.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected "No" to the question "Was the Center the lead on the activity?". It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate with other agencies on the activity.

  The field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

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The field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

  The fields are displayed for all program types.

  The field "List of Agencies" is required for all program types.

  The two fields on the "number of agencies collaborated" and "name of agency(ies) collaborated" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Primary Affiliated Project" lists all Project records that have been entered into the Projects Dataset for the current year of data

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collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

There is also a “not applicable” check box if your Center/Program did not fund the activity.

The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

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- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Other Direct/Model Services”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Other Direct/Model Services”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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6.7 Adding New Records with Activity Core Function “Performing Research or Evaluation“ in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Performing Research or Evaluation”. This video will demonstrate how to create a new and edit an existing activity record with core function “Performing Research or Evaluation”.

Research is basic or applied research, evaluation, and the analysis of public policy in areas that affect or could affect, either positively or negatively, individuals with developmental disabilities and their families.

Quality Improvement are activities that use deliberate processes to improve the efficacy and impact of activities, programs, or systems.

Evaluation is activities that systematically collect information to assess a project, program, or system’s performance or outcomes.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.

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- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Performing Research or Evaluation”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Performing Research or Evaluation fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

  You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not

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required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Performing Research or Evaluation”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

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If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- The "Type of Activity" field allows you to indicate how the activity enhances communities. You can select one of the options:

  Advocacy, or active support for a program, initiative, or change.
  Capacity building, or strengthening local, state, regional, and national communities.
  Systemic change, or modifying entire programs, policies, services, and/or funding streams.

  The field is displayed and required for all program types.

- For "Area of Emphasis", You can specify topic areas for Activities, such as Activities 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

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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.

The field is displayed and required for all program types.

- "Types and Numbers of Participants" allows you to enter the number of people within each category that were participants in the activity.

  You will be asked for the unduplicated number of participants across various categories, such as trainees, other classroom students, professionals and para-professionals, caregivers, adults with disabilities, legislature/policy makers, community members, and partners that participated as participants.

  A total participants category will automatically calculate the number of participants across all categories.

  You must provide the number of unduplicated participants across all categories. A single participant should not be counted more than once in more than one category.

  For example, a trainee might also be an adult with a disability. You should count them only once under their primary role in participating in the activity. So, if they were there as a person with a disability, count them only once in the "Adults with Disabilities" category.

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The field is displayed and required for all program types.

- In the "Type(s) of research conducted or supported" field, you should select all options that apply, such as intervention research, primary research, and secondary data analysis. Keep in mind that Research includes activities that support the systematic investigation of topics related to maternal and child health (MCH), including programs that directly fund research studies. Infrastructure Support involves providing resources, logistics, or coordination to enable research and foster innovation (e.g., research networks).

  The field is displayed and optional for all program types.

- Select "Yes" if the activity engaged family member(s) or person(s) with personal experience in the next question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". Note that additional fields will display on the form.

  The field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

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A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individuals with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individuals(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate with other agencies on the activity.

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The field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

  The field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

  For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in

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the boxes provided.

The fields are displayed for all program types.

The field “List of Agencies” is required for all program types.

The two fields on the “number of agencies collaborated” and “name of agency(ies) collaborated” are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- “Topic(s) of Research Conducted or Supported” to indicate all topic areas that describe the activity. You may select a sub-topic word without also selecting the corresponding general topic area.

For example, you may select “Early Childhood - Newborn Screening” without selecting “Early Childhood - General”. In addition, you may select only the general topic area if none of the sub-topic area words apply.

The field is displayed and required for forms with program type(s) LEND + UCEDD, LEND-only, LEAH, or DBP. It is hidden or forms with program type UCEDD-only.

- “Primary Affiliated Project” lists all Project records that have been entered into the Projects Dataset for the current year of data collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

  If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

  There is also a “not applicable” check box if your Center/Program did not fund the activity.

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The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

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The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Performing Research or Evaluation”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Performing Research or Evaluation”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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.

6.8 Adding New Records with Activity Core Function “Product Development and Information Dissemination” in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Product Development and Information Dissemination”. This video will demonstrate how to create a new and edit an existing activity record with core function “Product Development and Information Dissemination”.

Information dissemination is the distribution of knowledge and that illustrates the UCEDD as a trusted resource with expertise that can be used in many different places and situations.

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Product development is used to track the activities on the development of any deliverables that your Center/Program creates.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Product Development and Information Dissemination”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Product Development and Information Dissemination fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. You must select this field for co-located UCEDD + LEND Programs for each

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record.

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

Please be mindful, as Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Product Development and Information Dissemination”.

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- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity” to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person’s name, separated by semicolons, into the text box.

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

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

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

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The field is displayed and optional for all program types.

- The “Type of Activity” field allows you to indicate how the activity enhances communities. You can select one of the options:

  Advocacy, or active support for a program, initiative, or change.
  Capacity building, or strengthening local, state, regional, and national communities.
  Systemic change, or modifying entire programs, policies, services, and/or funding streams.

  The field is displayed and required for all program types.

- “Mechanism of Outreach/Education” to indicate the method that was used to disseminate information or provide outreach/education to participants. Examples include if it was provided via a webinar, educational material, an event, or conference presentation. When selecting the “Other” option you must provide a description in the text box.

  The field is displayed and required for forms with program type(s), UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- For “Area of Emphasis”, You can specify topic areas for Activities, such as Activities 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

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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.

The field is displayed and required for all program types.

- "Types and Numbers of Participants" allows you to enter the number of people within each category that were participants in the activity.

  You will be asked for the unduplicated number of participants across various categories, such as trainees, other classroom students, professionals and para-professionals, caregivers, adults with disabilities, legislature/policy makers, community members, and partners that participated as participants.

  A total participants category will automatically calculate the number of participants across all categories.

  You must provide the number of unduplicated participants across all categories. A single participant should not be counted more than once in more than one category.

  For example, a trainee might also be an adult with a disability. You should count them only once under their primary role in participating in the activity. So, if they were there as a person with a disability, count them only once in the "Adults with Disabilities" category.

  The field is displayed and required for all program types.

- Select "Yes" if the activity engaged family member(s) or person(s) with personal experience in the next question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". Note that additional fields

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will display on the form.

The field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the "Engagement Area", you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the "read definition" linked in blue under each column header.

  The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the field, "Were the Persons with Personal Experience from any of the following population categories?" you can select all the options that apply by clicking the check boxes. You should select all the categories that apply that the individual(s) with personal experience and family member(s) self-identify with.

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The field will be displayed if you select "Yes" to the question "Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?". This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The "Purposes of partnerships/collaborations" field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a "not applicable" check box if your Center/Program did not collaborate with other agencies on the activity.

  The field is displayed and required for all program types.

- "Primary Agency Collaboration on the Work of the Activity" allows you to identify the primary agency that collaborated on the Activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if you invited a local tribal agency to do a training with your trainees, you might select "Tribal entities" from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

  The field is displayed and required for all program types.

- "Agencies Collaborating on the Work of the Activity" contains a list of collaborators on the activity. There are many options, so be sure to look through them carefully. You can select as many as desired.

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The "Number of Agencies" field lets you indicate how many agencies you collaborated with. When you check the box for the collaborating agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all collaborating agencies that have been selected, though you can click in the box and change the number if desired.

The "List of Agencies" allows you to list the name of the agencies that collaborated on the activity.

For example, if you collaborated with a tribal entity, you would enter the name of the agency that you collaborated with. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

The fields are displayed for all program types.

The field "List of Agencies" is required for all program types.

The two fields on the "number of agencies collaborated" and "name of agency(ies) collaborated" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Subject Area" to indicate the topic(s) that were discussed. If none of the options are applicable, select "None of the above".

  The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Topics of outreach/education" to indicate all topic areas that describe the activity. You may select a sub-topic word without also

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selecting the corresponding general topic area.

For example, you may select “Early Childhood - Newborn Screening” without selecting “Early Childhood - General”. In addition, you may select only the general topic area if none of the sub-topic area words apply.

The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- “Primary Affiliated Project” lists all Project records that have been entered into the Projects Dataset for the current year of data collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

  If you do not see the project listed, you should complete data entry on the form, and then click “Add Primary Project” in blue to add a record.

  There is also a “not applicable” check box if your Center/Program did not fund the activity.

  The field is displayed and required for all program types.

- The “Secondary Affiliated Project” functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select “Add Secondary Project” to add a project record.

  The field is displayed and optional for all program types.

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- The “Duration” field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the “Date of Activity” using the format listed “MM/DD/YYYY”. If the activity met over multiple sessions or if it is still ongoing, you can use the date that the activity began.

  The field is displayed and optional for all program types.

- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as UCEDD or LEND training didactics where your trainees meet on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Product Development and Information Dissemination”:

1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Product Development and Information Dissemination”. The number is zero if no records exist for the core function.

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3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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.

6.9 Adding New Records with Activity Core Function “Technical Assistance” in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Adding New Activity records with Activity Core Function “Technical Assistance”. This video will demonstrate how to create a new and edit an existing activity record with core function “Technical Assistance”.

Technical Assistance or TA is Center/Program staff helping others solve problems or improve what people with disabilities, families, programs, and organizations do. TA typically aims to build the organizational capacity by giving expert advice, sharing knowledge, providing training, and/or helping to improve services, outcomes, policies, or management to make programs more effective.

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

To add a new activity record in the Activities Dataset, click on “Add Activity” from the Activities Dataset navigation bar.

On the page, there is a table where each row is dedicated to each activity core function:

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- The first column, “Activity Core Function”, lists each type of activity core function. Each Type includes a “Read more” link that opens a new window with the activity core function’s definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Count” column displays the number of records entered for each activity core function in the current data collection year. Clicking this number will show only associated records for that core function.

Keep in mind that the online form for each core function is unique.

Click on the “Add” Button next to the activity core function for ”Technical Assistance”.

Please note that required fields are identified with an asterisk (*) next to it. All required fields must be completed to save the record.

Technical Assistance fields include:

- The first field is unique for co-located UCEDD + LEND Centers/Programs. “Program Type” allows you to indicate which funder you are reporting the record to. 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 Activity records with “LEND” or “UCEDD” + “LEND” selected will be included in Standard Reports in the Activities Dataset intended to assist in reporting to MCHB.

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

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ACL.

You will also note that questions will differ based on your selection for the “Program Type” field. For example, some fields will be required when selecting “UCEDD + LEND” that are not required when selecting “UCEDD-only”.

You can also view the interaction for the “Program Type” field in the Data Dictionary.

Select the applicable program type(s). Click the “Save and Continue” in blue to go to the next page. Select “Cancel” to return to the “Add Activity” screen.

- “Fiscal Year:” This field will be automatically provided to indicate the current year of data collection. Activity records can only be entered into the current year of data collection.

- Activity “Core Function”, based on your selections in the prior screen, e.g., “Technical Assistance”.

- A unique “Title” for each Activity record should be provided for each activity record. Provide a title that will make it easily identifiable.

  The field is displayed and required for all program types.

- You can also provide a “Brief Description”, similar to a summary or abstract, to provide a brief overview of the topic of the activity such as the date, location, staff involved, topic(s) discussed, and/or what took place.

  The field is displayed and optional for all program types.

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- The "Staff Involvement" field allows you to supply the name(s) of the staff who collaborated on the activity. Each name should be separated by semi-colons.

If you click into the drop-down box, it will show the list of names. You can click on any applicable name from the Activity Staff/Staff Involvement drop-down menu, and then click on the blue button "Click to Link selected person to the activity" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will automatically enter the person's name, separated by semicolons, into the text box.

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

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

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

The field is displayed and optional for all program types.

- The "Primary Target Audience" to indicate the intended scope or geographic/demographic audience for the activity. For example, does it target local individuals, title v populations, tribal groups, and so on.

  The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

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- The “Type of Activity” field allows you to indicate how the activity enhances communities. You can select one of the options:

  Advocacy, or active support for a program, initiative, or change.
  Capacity building, or strengthening local, state, regional, and national communities.
  Systemic change, or modifying entire programs, policies, services, and/or funding streams.

  The field is displayed and required for all program types.

- For “Area of Emphasis”, You can specify topic areas for Activities, such as Activities 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.

  The field is displayed and required for all program types.

- “Intensity of TA” to indicate how often the TA was provided to recipients, such as if the TA was provided only once on a specific topic, if the TA was provided on multiple days to resolve the question, if TA was provided three times or less per year (July 1 – June 30), or if it was provided more than three times a year.

  The field is displayed and required for all program types.

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- "Method of Technical Assistance" to indicate the method of how the TA was provided, such as if it was a site visit, training, or consultation, a group training, via collaborative networks, or a presentation.

  The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Types and Numbers of Participants" allows you to enter the number of people within each category that were participants in the activity.

  You will be asked for the unduplicated number of participants across various categories, such as trainees, other classroom students, professionals and para-professionals, caregivers, adults with disabilities, legislature/policy makers, community members, and partners that participated as participants.

  A total participants category will automatically calculate the number of participants across all categories.

  You must provide the number of unduplicated participants across all categories. A single participant should not be counted more than once in more than one category.

  For example, a trainee might also be an adult with a disability. You should count them only once under their primary role in participating in the activity. So, if they were there as a person with a disability, count them only once in the "Adults with Disabilities" category.

  The field is displayed and required for all program types.

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- Select “Yes” if the activity engaged family member(s) or person(s) with personal experience in the next question “Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?”. Note that additional fields will display on the form.

  The field is displayed for all program types and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- For the “Engagement Area”, you will see a list of areas and you should enter the number of family members and persons with personal experience within the three engagement areas 1) Program development, Planning, and Evaluation, 2) Leadership Training, and 3) Active leadership.

  Again, provide the number of unduplicated individuals across categories, e.g., a single person should not be counted more than once.

  A total category will automatically calculate the number of people across engagement areas for 1) the total number of engaged family member(s), and 2) total number of engaged person(s) with personal experience.

  You will find definitions are provided in the data dictionary and by clicking on the “read definition” linked in blue under each column header.

  The field will be displayed if you select “Yes” to the question “Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?”. This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

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- For the field, “Were the Individuals with Personal Experience from any of the following population categories?” you can select all the apply by checking the check boxes. You should select all the categories that apply that the person(s) with personal experience and family member(s) self-identify with.

  The field will be displayed if you select “Yes” to the question “Did the activity support the engagement with a Family Member AND/OR Other Individual with Personal Experience?”. This field is required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- The “Was the Center the lead on the activity?” field is required for UCEDD records. If your Center assumed the overall responsibility or leadership of the activity, you should select “yes”.

  UCEDDs are obligated to collect satisfaction surveys from participants to gauge feedback for all activities where the Center is the lead, especially if those activities are within your primary area of emphasis.

  If selecting “Yes” you will be asked a follow up question on the number of people surveyed and the number of people who responded to the satisfaction surveys on an intention 4-point Likert scale (strongly agree, agree, disagree, strongly disagree).

  The field is displayed and required for forms with program type(s), UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- “Customer Satisfaction Measures” or consumer satisfaction measures are satisfaction surveys gauging their satisfaction of the activity that they participated in.

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Keep in mind that customer satisfaction measures are expected within each core function except for research. For example, you might ask participants “I am satisfied with the knowledge and skills gained from the training” with options within the 4-point Likert scale.

"Consumers" are the customer to whom a service or product is designed for and delivered to. Therefore, your trainees may be considered consumers. Additionally, consumers can be any recipient of UCEDD core grant activities. Please note that consumer satisfaction measures do NOT capture whether the participants’ knowledge, skills, attitudes, health, and so on were impacted.

A total category will automatically calculate the number of participants across all 4-point Likert response categories.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. The field will be grayed-out if you selected “No” to the question “Was the Center the lead on the activity?”. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- “Initial Outcome Measures” are intended to capture how the participants’ knowledge, skills, attitudes, health, etc., were affected as a result of the activity.

  Initial Outcome Measures are required for UCEDD records. If you did not gather initial outcome measures, there is a “not applicable” check box you can select.

  Similar with the previous field on consumer satisfaction measures, the 4-point Likert scale is intentional.

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Supply the total number of people surveyed regardless and the number of people who responded within each of the 4-point Likert scale categories. A total category will automatically calculate the number of participants across all 4-point Likert response categories. For example, you might ask trainees “As a result of this training, my knowledge of… (insert training topic) has increased.”.

This field is displayed and required for forms with program type(s) UCEDD + LEND or UCEDD-only. It is hidden for forms with program type(s) LEND-only, LEAH, or DBP.

- The “Purposes of partnerships/collaborations” field allows you to indicate any of the reason(s) collaborators established, supported, engaged, and continued partnerships/collaborations with other agencies to support the work at your Center/Program.

  You can check as many as desired. There is also a “not applicable” check box if your Center/Program did not collaborate with other agencies on the activity.

  The field is displayed and required for all program types.

- “Primary Recipient of TA” allows you to identify the primary agency that received TA through the activity. Be sure to look carefully through the list of the options in the drop-down menu. For example, if your Center/Program provided problem solving services with a tribal agency, you might select “Tribal entities” from the listed options.

  When you select the option, you will notice that it will be automatically selected in the options below.

  The field is displayed and required for all program types.

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- "Agencies Receiving TA" contains a list of recipients of TA. There are many options, so be sure to look through them carefully. You can select as many as desired.

  The "Number of Recipients" field lets you indicate how many agencies that received TA. When you check the box for the agency, one ("1") will be automatically entered. You must list at least one (1) in the box provided for all agencies that have been selected, though you can click in the box and change the number if desired.

  The "List of Recipients" allows you to list the name of the agencies that received TA on the activity.

  For example, if you provided TA to a tribal entity, you would enter the name of the agency that received the TA. Do not enter the name of the faculty/staff from the agency. You should enter the name of each agency for categories that have been selected. If you indicated more than one ("1") in the number of agencies, be sure to list the appropriate names of all agencies in the boxes provided.

  The fields are displayed for all program types.

  The field "List of Recipients" is required for all program types.

  The two fields on the "Number of Recipients" and "List of Recipients" are required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP.

- "Subject Area" to indicate the topic(s) that were discussed while providing the TA. If none of the options are applicable, select "None of the above".

  The field is displayed and required for forms with program type(s)

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UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Topics of Technical Assistance" to indicate all topic areas that describe the TA. You may select a sub-topic word without also selecting the corresponding general topic area.

For example, you may select "Early Childhood - Newborn Screening" without selecting "Early Childhood - General". In addition, you may select only the general topic area if none of the sub-topic area words apply.

The field is displayed and required for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Total number of TA activities" where you can provide the total number of TA activities throughout the reporting period.

  The field is displayed and optional for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Total number of TA Recipients" to provide the total number of TA recipients for the activity.

  The field is displayed and optional for forms with program type(s) UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Number of Organizations assisted" to provide the total number of organizations that were assisted as a result of the TA.

  The field is displayed and optional for forms with program type(s)

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UCEDD + LEND, LEND-only, LEAH, or DBP. It is hidden for forms with program type UCEDD-only.

- "Primary Affiliated Project" lists all Project records that have been entered into the Projects Dataset for the current year of data collection. Keep in mind that Projects are funding opportunities. You should select the top funding source that supported the work of the activity from the drop-down menu.

  If you do not see the project listed, you should complete data entry on the form, and then click "Add Primary Project" in blue to add a record.

  There is also a "not applicable" check box if your Center/Program did not fund the activity.

  The field is displayed and required for all program types.

- The "Secondary Affiliated Project" functions similarly to the previous field. You can select up to two (2) projects associated with an activity.
  Again, if you do not see the desired project from the list, you can complete data entry on the form and select "Add Secondary Project" to add a project record.

  The field is displayed and optional for all program types.

- The "Duration" field allows you to enter the number of hours that the activity was conducted.

  The field is displayed and required for all program types.

- Enter the "Date of Activity" using the format listed "MM/DD/YYYY". If the activity met over multiple sessions or if it is still ongoing, you

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can use the date that the activity began.

The field is displayed and optional for all program types.

- Select the “Recurring Activity” checkbox if the activity meets on multiple sessions. This is to help decrease the burden of data entry.

  For example, if you have an activity such as TA provided through your UCEDD or LEND that meets on a regular basis, you could enter a single activity, select the “Recurring Activity” check box, and then update the number of hours the activity took place in the “Duration” field. This option will work best if participants and topics remain largely the same across sessions.

  The field is displayed and optional for all program types.

Keep in mind that data entry should be completed for the dates of July 1 to June 30 of each year. Once you are done making your selections, save the page.

To edit existing Activity records with core function “Technical Assistance”:
1) Select “Add Activity” from the Activities Dataset navigation menu.
2) In the “TOTAL COUNT” column, locate the number listed for core function “Technical Assistance”. The number is zero if no records exist for the core function.
3) Click on the number to view and edit the associated Activity core function records.
4) Click on the three dots under the “Manage” column next to the desired record and select “edit” to open the record.
5) Be sure to save the page once changes to the form are complete.

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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6.10 Managing Existing Activity Records

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

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

Existing Activity records can be accessed in one of two ways:

1. Click on the Activities Dataset and select “Add Activity”. Under the “total count” column, a highlighted number can be clicked on to view records within each activity core function. This method will work if you want to view all records within a specific activity core function within the current year of data collection.
2. Click on the Activities Dataset and select “Manage Activities” in the navigation menu. This option will work if you want to view all Activity records within the current year of data collection.

On the “Manage Activity” page, 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.

Going on down the page, you will see:

- The title of the Activity, 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 “manage” column with three dots next to each record.
- The activity core function.
- The date of the activity as listed during data entry in the corresponding field at the bottom of the form.
- The date that the record was created and last edited.

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To manage (edit, view, delete) existing Activity records within the current year of data collection, click on the three dots under the “Manage” column. You will see three options:

i. "Edit" to update the responses in the Activity 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 record is final and cannot be undone.

Activity 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 Activity 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 the brief description for the record, you should scroll down to the “Brief Description” field, and click on text box provided to manually type in the edits.

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.

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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6.11 Overview of the “Advanced Search” function in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Overview of the “Advanced Search” function in the Activities Dataset”. This video will provide an overview of the “Advanced Search” function in NIRS and its purpose and walk through searching across Activity records in the Activities 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 for all activities related to specific “keywords” or topic areas, such as initiatives related to a specific topic, e.g., Autism diagnostic services.
- To locate activities by title, which may be helpful when entering new records to reduce duplicate data entry,
- To search activities that support a specific area of emphasis,
- To easily identify records where “your Center was the lead”

To get to the Advanced Search in the Activities Dataset, log in to NIRS. In the navigation bar at the top of the screen, click on the Activities 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 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 will be automatically selected.

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To indicate a different year, 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 "Keywords" option is a text field. The "Keywords" will search for all mentions of a phrase or word as listed in the Activity record's "title", "keywords", and "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 have three portions:
    1) The first drop-down box lists 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.

        "ACTIVITIES" means that it originates from the Activities form in the Activities Dataset, and "QTY" means that it originates from the product dissemination tool in the Products 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)"

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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 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, you can type in your selections.

For example, let's say that you are reviewing the UCEDD annual Program Performance Report (PPR) to identify the title of all records with a specific primary project. You recall that there is a "Primary Affiliated Project" field located near the bottom of the Activity record form which you can use. Follow these steps:

- For "Fiscal year(s)" select the current year of data collection. If needed, click on the "X" button to remove the selections, and select the appropriate year from the drop-down menu.
- 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 "Primary Affiliated Project" field is located in the activity form in the Activities Dataset. As you scroll through the options, you will find one listed "ACTIVITIES Primary Project (L)", which means that it is from the Activities Dataset form, the field is called "Primary Project" on the online form, and it is a list field.

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- In the comparator, select “equal to” to identify any activities with a specific selection,
- In the last field, select the appropriate project record from the drop-down option menu.
- Click “Search” highlighted in blue at the bottom of the page to find all records that have the affiliated primary project with the activity.

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

If the results come back with matching record(s), you will see the following for each activity:

- Activity title,
- The “Manage” column to edit the contents of the activity record, view the record without editing it, or delete the record.

  The option to “Edit” and “Delete” are only available for records within the current year of data collection.

  The system will ask you to confirm if you select the “Delete” option. Remember that deleting a record is permanent and cannot be undone.
- Core function
- Date of the activity
- When the record was created and last edited
- Primary affiliated project

If the results are blank or none of the results match the correct activity record, you can add a new activity record.

If you find a matching activity record, you can simply click on the title to view the record. 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

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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, 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 Activities Dataset form or the Products Dataset dissemination tool 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.

6.12 The "Save as New" Feature in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled "The "Save as New" Feature in the Activities Dataset". This video will discuss the purposes of the "Save as New" feature and walk through an example.

The "Save as New" feature in the Activities Dataset can be used for two scenarios:

1. To change the activity core function for an existing record, and
2. To bring multi-year Activities from a prior year of data collection to the current year of data collection.

We will cover the first option and then move on to the second.
Let's dive into each scenario.

1) Imagine you were entering initiatives in the Activities Dataset. Later, you realize that you accidentally selected the wrong core function for one of the entries.

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Instead of starting a new activity record from scratch, you can use the information from the incorrect record to pre-fill a new form in a correct core function activity form. This makes the data entry process faster and easier.

To access the “Save as New” feature, go to the Activities Dataset and select “Manage Activities” from the navigation bar.

Find the Activity 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 the “—New Core Function—" drop-down menu, select the desired activity core function, then 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. 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, participants for the current fiscal year, and so on.

Please note that each activity form has a unique set of fields. You may need to plan data entry accordingly for any additional information required for the specific core function. For example, if changing the activity core function of a record from technical assistance to information dissemination, the form will ask for additional information on the mechanism of outreach, such as if it was provided via webinar, educational material, public event, and so on.

You should also update the record's title to ensure it is unique and easily identifiable, as you will need to refer to it later in other areas of NIRS. You should also ensure that the activity has the correct staff involvement, affiliated projects, date, participants, and review the brief description.

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Once you are happy with your responses, and all required fields indicated with an asterisk (*) have been completed, save the record.

Keep in mind that the old record is not automatically deleted. Once you are finished creating the new record, there is one last step: you must delete the old record.

i. Return to the Activities Dataset and select “Manage Activities”.
ii. Locate the old record on the list and click on the three dots under the “Manage” column next to the record.
iii. Select “Delete”. The system will prompt you to confirm. Deleting a record is final and cannot be undone. Click confirm to permanently delete the erroneously created record.

2) The second scenario is if you want to use the “Save as New” feature to bring prior year records into the current year of data collection.

For example, your Center/Program conducts technical assistance services with a long-standing partner and you record the assistance provided under a single record annually, updating the duration in hours to reflect work across July 1 to June 30. You want to save time on data entry by using a pre-filled form based on a record that exists from the previous year.

In this scenario, you will follow many of the same steps as in the first scenario.

i. Locate the record. This time, the record will be in a prior year of data collection. Go to the Advanced search in the Activities Dataset to search for records within a specific year or by title.

   Alternatively, go to the Activities Dataset and select “Add activity” from the navigation menu. At the top of the page, you will see an option to search for records with a specific year. Select the applicable year. For example, the previous year of data collection for us is 2026, so I will clear existing selections and select the

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"2026" option.

Then, press "CTRL + F" to search the page, and type in the activity's title.

ii. Next to the record, click on the three dots under the "Manage" column. Select "View".

iii. In the "—New Core Function—" drop-down, select the applicable core function. In this case, it will be "Technical Assistance".

Similarly, as before, you should go field by field and update the selections on the form. You will note that selections from the original record are pre-filled for your convenience. You should be sure to supply a new date for the activity. Any new fields on the form will also be required. Once you are done making any changes and you have updated the record for the current year of data collection, save the page.

Note that in this scenario, there is no need to delete the old record. That is all you need to do to use a pre-filled record from the previous year to recreate the activity in the current year of data collection.

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.

6.13 Overview of Standard Reports in the Activities Dataset

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

NIRS offers many helpful tools to assist you in providing data to government agencies and answering internal questions for your

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Center/Program. Standard Reports in the Activities Dataset contain pre-populated reports that summarize data entered in NIRS.

To access the reports, you need to have NIRS Administrator access to the Activities Dataset. In the Activities Dataset, select "Standard Reports" from 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.

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

- Activities by Collaborating agency, if you want to view a list of all activity records across all core functions with percentages and totals

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for each collaborating agency category.

- Data Entry Errors, which should be run periodically throughout the year to ensure that your data is not missing required fields. A list of fields that require your attention is also provided in the report. 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 Activities Dataset. If successful, the record will no longer be listed.

- Under the "UCEDD" column, the "Activities by Area of Emphasis" can be helpful for viewing the total number of activities within each area of emphasis. You might use this report as a data quality check on your primary area(s) of emphasis.

- Under the "LEND, LEAH, PPC, DBP" column, there are also many Standard Reports that will support Programs with reporting requirements to the federal funder. Examples are "Continuing Education / Community Training: MCH Collection 2025+" to list the number of continuing education participants, continuing education activities, and continuing education activities where credits are provided. It also lists continuing education records to assist you with identifying the top ten (10) continuing education activities.

  Other examples might be "Type of direct services provided (2025+)", "Partnerships and Collaborations: Purpose (2025+)", "Mechanism of outreach/education (2025+)", and "Subject and Topic Areas (2025+)".

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

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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.

6.14 Overview of Custom Reports in the Activities Dataset

Welcome to the video of the "Activities Dataset" section of the NIRS Learning Modules titled “Overview of the Custom Reports in the Activities Dataset”. This video will discuss the purpose of custom reports and demonstrate creating a custom report in the Activities 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 Activities 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 Activities Dataset by clicking on the Activities 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 Activity 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.

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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,
- 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,

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- "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.

  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:

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In capital letters, you will see which form the field originates from.

“ACTIVITY” means that it originates from the activity form in the Activities Dataset, and “QTY” means that it originates from the product dissemination tool in the Products Dataset.

Next, the field header from the online form is listed in lower-case letters. 5:00

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.

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"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 category to refine your search. For text boxes, you can 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.

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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 (“<<”).

- 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 number of participants within a specific category.

Let’s do an example. Let’s say that your Director is reviewing the UCEDD annual Program Performance Report (PPR) and has asked you to verify that consumer satisfaction measure responses are complete and accurate for core function “Model Services”. Follow these steps:

- In the “Title”, you could call it “Model Service Consumer Satisfaction Measures (CSM)”
- I will keep the “Default” set to “Browse” because I prefer to view results in an internet web-browser.
- For “Category”, you could enter “PPR review”.
- For “Notes”, leave a brief note on the purposes of the custom report.

  For example, say that this custom report is used to pull all Consumer Satisfaction Measures for core function “Model services”.

- For “Selected fields”, these are the fields from the online form. There are eight (8) fields that I am interested in, 1) the fiscal year of the activity, 2) activity title, 3) if the center was the lead of the activity, 4) the total number of people who were surveyed, and 5-8) the responses from survey respondents in the 4-point Likert scale (Strongly Agree, Agree, Disagree, Strongly Disagree).

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Optionally, you may include the program type field, labeled "ACTIVITY Program Type (L)". This may help provide additional information for co-located UCEDD + LEND Centers/Programs.

You know that all of the fields are listed in the Activities Dataset record form, so you are looking for selected fields with "ACTIVITY" listed in capital letters.

You should scroll through the options to find the following fields listed on the left side and move them to the right side:

- "ACTIVITY Title (T)",
- "ACTIVITY Fiscal Year (N)",
- "ACTIVITY Customer Center Lead (N)",
- "ACTIVITY Customer Surveyed (N)",
- "ACTIVITY Customer Highly Satisfied (N)",
- "ACTIVITY Customer Satisfied (N)",
- "ACTIVITY Customer Somewhat Satisfied (N)",
- "ACTIVITY Customer Not Satisfied (N)", and
- "ACTIVITY Customer Satisfaction Total (N)"

- For "Selection Criteria", the UCEDD annual PPR only pulls records with program type = UCEDD or UCEDD + LEND. You will also need to view records only for the current year of data collection to be consistent with this year's PPR, and restrict the core function using the corresponding fields.

  In total, there will be three (3) selection criteria.

  1) Select "ACTIVITY Program Type (L)" in the first box, "like" in the second box, and select "UCEDD" in the third box. This will return results with all records that have UCEDD or UCEDD + LEND selected.
  2) Select "ACTIVITY Core Function (L)" in the first box, "equal to" in the second box, and then select "Direct Clinical Services/Model Services" in the third drop-down menu. That will

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return only records within the specific core function that was selected.

3) Select “ACTIVITY Fiscal Year (N)” in the first box, “equal to” in the second box, and then type in the current fiscal year for the third box. This will restrict records to only those records entered in the current year of data collection.

Keep the “AND” comparator under the first selection criteria since we need only those records where all three selection criteria are true.

- 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 “PPR Review” category has been added. Click on the “+” sign to expand the category and see that the report that we just made is now listed in it.

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 select to click “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.

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.

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- 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.

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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