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7.0 Products 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.

7.1 Overview of the Products Dataset and Product Material Types

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

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

The Products Dataset captures products, publications, and submissions that have been published or produced with grant support (either entirely or partially) during the reporting period by Centers/Programs.
The Products Dataset also allows Centers/Programs to record and track product dissemination information.

Products, publications, and submissions must be assigned to a relevant Material type. Each product/deliverable created by your Center/Program can be associated with only one material type. The list of material types and data collection forms is based on federal documentation.
Product material types include:

- Academic course Development
- Book(s)
- Book chapter(s)
- Conference presentations and poster presentations

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- Distance learning modules
- Doctoral dissertation or master's thesis
- Electronic products, which were removed from the list of product material types in FY 2024 per reporting requirements from MCHB.
- Newsletters
- Other
- Pamphlets, Brochures, or Fact sheets
- Peer-reviewed publications in scholarly journals published/in press
- Peer-reviewed publications in scholarly journals submitted
- Press communications
- Reports and monographs
- Tool(s) or toolkit(s), which was introduced to NIRS in FY 2025 per reporting requirements from MCHB.
- Web-based products

NIRS resources helpful to the Products 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 product dissemination requirements for UCEDDs reporting to ACL.

The data dictionary can also be found at the top right of each page in the NIRS. It is beneficial for getting started, as it lists definitions for each field and provides examples for each product material type.

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

The Products Dataset is only viewable by users with appropriate NIRS login credentials and access to the Products Dataset.

To grant access to the Products Dataset, a NIRS Administrator from your Center/Program should:

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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.

3. 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 "Products" checkbox for the "Datasets" field. Save the page.

Now, when the NIRS user logs in to the NIRS application, they will find that they have access to the Products Dataset on the navigation menu.

If you click on the Products Dataset at the top of the page, you will see a drop-down with two columns. On the left side, you will see links to:

- Add new Product records,
- Manage existing Product records, and
- The Product Dissemination tool, which allows tracking of dissemination information for Product records.

  Dissemination means that products or deliverables were created or distributed at your Center/Program within the current year, that is, between July 1 and June 30. There is also an optional section to record how many, or the number of each Product, was disseminated

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in your communities, if that information is helpful for your Center/Program to track.

On the right side, you will see:

- Standard Reports, which contain pre-populated data that may answer questions in Grant Solution's and DGIS annual progress reports.
- 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 submitted in NIRS for your Center/Programs across all years you have used NIRS to collect data.

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

- Data Dictionary, which is a valuable resource that includes definitions for each field and examples for every product material type.
- Advanced Search, which allows you to search across all product records submitted to the Products 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.

7.2 Adding New Records with Product Material Type "Academic Course Development" in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Managing Records with Product Material Type "Academic Course Development" in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type "Academic Course Development".

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Examples of Academic course development are curricula, courses, or training Programs.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that material type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Academic Course Development”.

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

Academic Course Development fields include:

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

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entered into the current year of data collection.

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Academic Course Development”.

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

  This field is displayed and required for all program types.

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- The "Author(s)" field allows you to supply the name(s) of the author(s) for the course that was developed. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

This field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  This field is displayed and optional for all program types.

- "Date the course was created", which is unique to the product material type academic course development. Supply the date when your Center/Program initially created the course.

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This field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  This field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the course was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  This field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were

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developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

For example, if your Center disseminated 40 Products between July 1 and June 30.

This field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided on the online form for you to enter the number of copies disseminated for each product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

This field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the course, if applicable.

  This field is displayed and optional for all program types.

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- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the course in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the course. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  This field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  This field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers

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may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

This field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Academic Course Development":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Academic Course Development". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type records.
4) Click on the three dots under the "Manage" column next to the desired record and select "edit" to open the record.

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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.

7.3 Adding New Records with Product Material Type “Book” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled “Adding New Records with Product Material Type “Book” in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type “Book”.

Examples of Book(s) include whole textbooks for a university audience or research monographs published by university departments.

NIRS users with access to the Products Dataset can add new and edit existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.

Click on the "Add" Button next to the product material type for "Book".

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

Book fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

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the Data Dictionary.

- Product "Material Type", based on your selections in the prior screen, e.g.,“Book.”

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

  This field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the book that was developed. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

This field is displayed and required for all program types.

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- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  This field is displayed and optional for all program types.

- “Publisher” to indicate the name of the publishing company.

  This field is displayed and required for all program types.

- "Date of Publication", to supply the date when the book was published. Provide either the year or the month and year.

  This field is displayed and required for all program types.

- “Publisher Location”, where you must enter the city and state where the publishing company is located.

  This field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  This field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the book is intended to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

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This field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

   For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

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The field is displayed and optional for all program types.

- A text box is provided to supply the "APA Citation" for the book, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the book in the NIRS public search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the book. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though

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decimals may be used, for example, 23.99.

The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Book":

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1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Book”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.4 Adding New Records with Product Material Type “Book Chapter” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Book Chapter” in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type “Book Chapter”.

Examples of Book chapter(s) include individual chapters from textbooks aimed at a university audience or chapters of research monographs developed by university presses.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

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On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Book Chapter”.

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

Book Chapter fields include:

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

- 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 Product records with "LEND" or

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"UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Book Chapter”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the book. Semi-colons must separate each name.

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 "Add this person" 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 Product record before leaving the screen. If you do not see a name on the list, you have two options:

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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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- “Book Title” to enter the title of the book in which the chapter is published.

  The field is displayed and required for all program types.

- “Book Author” to enter the author of the book in which is chapter is published.

  The field is displayed and required for all program types.

- “Publisher” to indicate the name of the publishing company of the book.

  The field is displayed and required for all program types.

- "Date of Publication", to supply the date when the book was published. Provide either the year or the month and year.

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The field is displayed and required for all program types.

- “Publisher Location”, where you must enter the city and state where the publishing company is located.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the book chapter was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

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i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

   For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

   The field is displayed and optional for all program types.

- A text box is provided to supply the "APA Citation" for the book chapter, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the book chapter in the NIRS Public Search. No duplicate keywords are allowed.

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These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the book chapter. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration

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purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Book Chapter":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Book Chapter". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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

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improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

7.5 Adding New Records with Product Material Type “Conference presentations and posters presented” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Conference presentations and posters presented” in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type “Conference presentations and posters presented”.

Examples of Conference and poster presentations include poster presentations during workshops, plenaries, or abstracts published for an academic conference.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.
Click on the "Add" Button next to the product material type for "Conference presentations and posters presented".

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

Conference presentations and posters presented fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

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the Data Dictionary.

- Product "Material Type", based on your selections in the prior screen, e.g., “Conference presentations and posters presented”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the presentation or poster that was submitted. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

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- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- “Meeting or Conference Name” to enter the name of the conference or meeting where your Center/Program presented the poster or presentation.

  The field is displayed and required for all program types.

- "Date of Presentation", to supply the date when the oral presentation or poster was presented. You can provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- The “Type” is where you should select if it is an oral presentation or poster that was presented.

  The field is displayed and required for all program types.

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- "Target Audience", to provide additional context on who the product is intended to support, such as if the presentation or poster was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online

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form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the “To Obtain Copies” field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the conference presentation or poster, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the presentation or poster in the NIRS public search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the conference presentation or poster. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

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The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

1) If the faculty member has a profile, navigate to the Directory Dataset and select "Manage Faculty/Staff Profiles". The status option field in the user's profile controls how the person is listed in the Network Member Directory, "Ordering Name" field in the Products Dataset, and "Contacts" field in the Projects Dataset. This option will work if they are on the list and their display

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status is “Display” in Online Directory or “Do Not Display” in Online Directory. You can refer to detailed instructions in the Network Member Directory section of the Learning Modules.

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type “Conference presentations and posters presented”:

1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Conference presentations and posters presented”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.6 Adding New Records with Product Material Type “Distance Learning Modules” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Distance Learning Modules” in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type “Distance Learning Modules”.

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

Examples of Distance learning modules include modules where students work asynchronously and communicate via technology-based communication.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Distance Learning Modules”.

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

Distance Learning Module fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Distance Learning Modules”.

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

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The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the module that was created. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- "Date the module was developed", to supply the date when the module was created. You can supply either the year or the month and year.

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The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- The “Type” is where you should select the format of the module. There are many options, and you should select the one that best fits the module, such as if the module was provided in a podcast or blog format.

  When selecting the “Other” option, you must provide a description in the text box provided.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the module was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

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

Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

For example, if your Center disseminated 40 Products between July 1 and June 30.

The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS

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

Public Search.

The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the module, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the module in the NIRS public search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the module. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

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- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

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To edit existing Product records with material type “Distance Learning Modules”:

1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Distance Learning Modules”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.7 Adding New Records with Product Material Type “Doctoral Dissertation or Master’s Thesis“ in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Doctoral Dissertation or Master’s Thesis” in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type “Doctoral Dissertation or Master’s Thesis”.

Examples of Doctoral dissertation or master's thesis include dissertations and thesis accepted by relevant committees.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Doctoral Dissertation or Master’s Thesis”.

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

Doctoral Dissertation or Master’s Thesis fields include:

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

- 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

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UCEDD-only, LEND-only, DBP, and LEAH Programs.

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

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Doctoral Dissertation or Master’s Thesis”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the dissertation or thesis that was created. Semi-colons must separate each name.

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 "Add this person" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will

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

First, save the Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- "Date of Publication", to supply the date when the dissertation or thesis was published. Provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

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The field is displayed and required for all program types.

- The “Type” is where you should select if it was a doctoral dissertation or a master’s thesis.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the doctoral dissertation or master’s thesis was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

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For example, if your Center disseminated 40 Products between July 1 and June 30.

The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the doctoral dissertation or master's thesis, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the dissertation or thesis in the NIRS Public Search. No duplicate keywords are allowed.

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The field is displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the doctoral dissertation or master's thesis. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Doctoral Dissertation or Master's Thesis":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Doctoral Dissertation or Master's Thesis". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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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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.

7.8 Adding New Records with Product Material Type “Newsletters” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Newsletters" in the Products Dataset. This video will demonstrate how to create a new and edit an existing product record with material type “Newsletters”.

Examples of Newsletters include articles or editorials published in newspapers, newsletters, or magazines.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products 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 product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.

Click on the "Add" Button next to the product material type for "Newsletters".

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

Newsletter fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

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the Data Dictionary.

- Product "Material Type", based on your selections in the prior screen, e.g., “Newsletters”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the newsletter. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

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- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- "Date of Publication", to supply the date when the newsletter was published. Provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- The “Type” is where you should select the format for the newsletter, such as if it is in a physical print, electronic format, or both.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the newsletter was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

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- "Number of Subscribers" where you can enter the number of unduplicated people subscribed to the newsletter.

  The field is displayed and optional for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   An example would be if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

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For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- "Frequency of distribution" where you will select how often the newsletter goes out. For example, if it is a weekly newsletter, select the weekly option. When selecting "Other", you must enter a description of the frequency in the text box provided.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the newsletter, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the newsletter in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the newsletter. While the field is not required, it is

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highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Newsletters":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Newsletters". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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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7.9 Adding New Records with Product Material Type “Other” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Other" in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Other”.

Product material type “Other” should be used for any product developed that does not fit any of the other categories provided.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.
On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Other”.

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

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Other fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Other”.

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

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The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the product. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- "Date of Publication", to supply the date when the product was published. Provide either the year or the month and year.

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The field is displayed and required for all program types.

- “Describe product, publication, or submission”, where you will indicate the overall purpose of the product.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the product was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

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The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

   For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

   The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

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

- A text box is provided to supply the "APA Citation" for the product, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the product in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the product. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

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The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Other":

1) Select "Add Product" from the Products Dataset navigation menu.

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2) In the “Total Type Items” column, locate the number listed for material type “Other”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.10 Adding New Records with Product Material Type “Pamphlets, Brochures, or Fact Sheets” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Pamphlets, Brochures, or Fact Sheets” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Pamphlets, Brochures, or Fact Sheets”.

Examples of Pamphlets, brochures, or fact sheets include tip or fact sheets, pamphlets, or brochures.

NIRS users with access to the Products Dataset can add new and manage existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

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- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Pamphlets, Brochures, or Fact Sheets”.

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

Pamphlets, Brochures, or Fact Sheet fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting

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to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g.,”Pamphlets, Brochures, or Fact Sheets”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the pamphlet, brochure, or fact sheet. Semi-colons must separate each name.

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 "Add this person" 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 Product record before leaving the screen. If you do not see a name on the list, you have two options:

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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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- "Date of Publication", to supply the date when the pamphlet, brochure, or fact sheet was published. Provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- The “Type” is where you should select the format of the product. You must indicate if it is a pamphlet, brochure, or fact sheet.

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The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the pamphlet, brochure, or fact sheet was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

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ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the Pamphlet, Brochure, or Fact Sheet, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the pamphlet, brochure, or fact sheet in the NIRS Public Search. No duplicate keywords are allowed.

  The field is displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the pamphlet, brochure, or fact sheet. While the field is not required, it is highly recommended to provide a

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description, because this field is included in the NIRS Public Search as a searchable field.

The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Pamphlets, Brochures, or Fact Sheets":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Pamphlets, Brochures, or Fact Sheets". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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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7.11 Adding New Records with Product Material Type “Peer-reviewed publications in scholarly journals Published/In Press” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Peer-reviewed publications in scholarly journals Published/In Press” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Peer-reviewed publications in scholarly journals Published/In Press”.

Examples of Peer-reviewed publications in scholarly journals published/in press include scholarly articles that have been accepted for publication by a refereed journal.

NIRS users with access to the Products Dataset can add new and edit existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.

One common question you might ask is why are there two product material types for scholarly articles?

There are two product material types: one for articles submitted and under review, and another for articles accepted and published in a scholarly journal. Many submitted scholarly journals often undergo edits before they are accepted and published by the publishing company. Thus, the deliverable when an article becomes published often differs from the submitted article.

Scholarly journals should be reported in NIRS based on their status during the fiscal year:

1. When submitted to a publisher – report under the product material type "Journals Submitted"
2. When accepted and published – report the record under "Journals Published/In Press"

If the scholarly journal is submitted in one fiscal year, and accepted or published in a later fiscal year, the journal can be entered twice under the corresponding material type, one for each fiscal year and corresponding material type.

For example:

- If a scholarly journal is submitted in FY 2026, enter the product in the FY 2026 data collection year using “Journals Submitted”.
- If the journal is accepted or published in FY 2027, enter the product again in the FY 2027 data collection year using the “Journals Published/In Press”.
- If a scholarly journal is submitted and accepted or published in the same year of data collection, enter the product only once using the material type that reflects its final status during that fiscal year.

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In short, a scholarly journal may be reported twice only when its status changes across fiscal years. Within the same fiscal year, report it once using the material type that best reflects its final status.

Click on the "Add" Button next to the product material type for "Peer-reviewed publications in scholarly journals Published/In Press".

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

Peer-reviewed publications in scholarly journals Published/In Press fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Peer-reviewed publications in scholarly journals Published/In Press”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the published scholarly journal. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

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

The field is displayed and required for all program types.

- The “Contributing Author(s)” field contains a radio button. The field will default to “No”. If there are contributing author(s) who worked on the published scholarly journal, select “Yes” to bring up additional options.

  The field functions similarly to the previous “Author(s)” field. If you do not see a name on the list, either 1) navigate to the “Manage Activity Staff” screen in the Admin section and add the person to the list, or 2) simply type in the person’s name into the text box.

  If a name is in the list, click on the person in the drop-down menu, and select “Link This Person” to enter them into the text box below the drop-down menu.

  The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

- The publishing company supplies the article DOI upon submission. You should provide the article's unique DOI. You may also read more about the definition and format of the field by clicking on the "more information" button highlighted in blue.

  The field is displayed and required for all program types.

- Supply the name of the Publication company in the next field.

  The field is displayed and required for all program types.

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- The "Volume" number is typically provided by the publishing company when accepted. Provide the volume for the published scholarly journal, or supply "0" if the volume is not applicable.

  The field is displayed and required for all program types.

- Provide the "Supplement", which are a collection of papers on related topics, if applicable.

  The field is displayed and optional for all program types.

- Provide the "Pages" or range of pages for the journal article. You can use a dash (-) when providing a range of pages, for example 1 – 30.

  The field is displayed and required for all program types.

- “Date of Publication”, or when it was accepted. Provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

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- "Target Audience", to provide additional context on who the product is intended to support, such as if the publication was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Dissemination Vehicle, which is the format that the article will be disseminated, such as a press release, radio or TV interview, listserv, and so on.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

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The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the published scholarly journal, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the published scholarly journal in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

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- "Brief Description", to provide a brief overview of the topics discussed in the published scholarly journal. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Peer-reviewed publications in scholarly journals Published/In Press":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Peer-reviewed publications in scholarly journals Published/In Press". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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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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.

7.12 Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals submitted" in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals submitted" in the Products Dataset". This video will demonstrate how to create a new and edit an existing product record with material type "Peer-reviewed publications in scholarly journals submitted".

Examples of Peer-reviewed publications in scholarly journals submitted include scholarly articles submitted to a refereed journal.

NIRS users with access to the Products Dataset can add new or edit existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, "Product/Publication Type", lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, "Manage", contains a link to the online form to add a new record.
- The "Total Type Items" column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.

One common question you might ask is why are there two product material types for scholarly articles?

There are two product material types: one for articles submitted and under review, and another for articles accepted and published in a scholarly journal. Many submitted scholarly journals often undergo edits before they are accepted and published by the publishing company. Thus, the deliverable when an article becomes published often differs from the submitted article.

Scholarly journals should be reported in NIRS based on their status during the fiscal year:

1. When submitted to a publisher – report under the product material type "Journals Submitted"
2. When accepted and published – report the record under "Journals Published/In Press"

If the scholarly journal is submitted in one fiscal year, and accepted or published in a later fiscal year, the journal can be entered twice under the corresponding material type, one for each fiscal year and corresponding material type.

For example:

- If a scholarly journal is submitted in FY 2026, enter the product in the FY 2026 data collection year using “Journals Submitted”.
- If the journal is accepted or published in FY 2027, enter the product again in the FY 2027 data collection year using the “Journals Published/In Press”.
- If a scholarly journal is submitted and accepted or published in the same year of data collection, enter the product only once using the material type that reflects its final status during that fiscal year.

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In short, a scholarly journal may be reported twice only when its status changes across fiscal years. Within the same fiscal year, report it once using the material type that best reflects its final status.

Click on the "Add" Button next to the product material type for "Peer-reviewed publications in scholarly journals submitted".

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

Peer-reviewed publications in scholarly journals submitted fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Peer-reviewed publications in scholarly journals submitted”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the submitted scholarly journal. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

ii) Click in the "Author(s)" 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 required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- Supply the name of the Publication company in the next field.

  The field is displayed and required for all program types.

- “Date of Submission”, or when it was submitted to the publishing company. Enter either the month or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the publication was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

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The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

   For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

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The field is displayed and optional for all program types.

- A text box is provided to supply the "APA Citation" for the submitted scholarly journal, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will be used to help the public locate the submitted scholarly journal in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the submitted scholarly journal. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though

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decimals may be used, for example, 23.99.

The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

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To edit existing Product records with material type “Peer-reviewed publications in scholarly journals submitted”:

1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Peer-reviewed publications in scholarly journals submitted”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.13 Adding New Records with Product Material Type “Press Communications” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Press Communications” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Press Communications”.

Examples of Press communications include interviews on the radio, television, public service announcements, and press releases.

NIRS users with access to the Products Dataset can add new and edit existing product records. If you have access to the Products Dataset, you will see in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

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On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Press Communications”.

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

Press Communication fields include:

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

- 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 Product records with "LEND" or

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"UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Press Communications”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the press communication. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- Date of Presentation, or the date of the announcement, interview, or editorial. Enter either the month or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

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

- The “Type” is where you will indicate the format for the press communication, such as if it is a TV interview, an interview over the radio, a public service announcement, and so on.

  When selecting the “Other” option, you must provide a description in the text box.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the press communication was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

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

For example, if your Center disseminated 40 Products between July 1 and June 30.

The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the press communication, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the press communication in the NIRS Public Search. No duplicate keywords are allowed.

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These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the press communication. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration

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purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Press Communications":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Press Communications". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

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

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.

7.14 Adding New Records with Product Material Type “Reports and Monographs” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Reports and Monographs” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Reports and Monographs”.

Examples of Reports and monographs include research, consultancy, or technical reports, handbooks, policy briefs, or monographs.

NIRS users with access to the Products Dataset can add and edit existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

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Keep in mind that the online form for each material type is unique.

Click on the "Add" Button next to the product material type for "Reports and Monographs".

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

Report and Monograph fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

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the Data Dictionary.

- Product "Material Type", based on your selections in the prior screen, e.g., “Reports and Monographs”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the report or monograph. Semi-colons must separate each name.

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 "Add this person" 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 Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

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- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- “Date of Publication”, or the date when the report or monograph was published. Provide either the year or the month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the press communication was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

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Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

For example, if your Center disseminated 40 Products between July 1 and June 30.

The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS

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Public Search.

The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the report or monograph, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the report or monograph in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the report or monograph. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

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- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

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To edit existing Product records with material type “Reports and Monographs”:

1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Reports and Monographs”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.15 Adding New Records with Product Material Type “Tools or Toolkits” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Tools or Tool Kits” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Tools or Tool Kits”.

Product material type “Tool(s) or toolkit(s)” was introduced to NIRS in FY 2025 per reporting requirements from MCHB. Programs should connect with their LEND, LEAH, or DBP Project Officer for guidance on classifying deliverables one way or another within this material type.

NIRS users with access to the Products Dataset can add new and edit existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

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To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

Click on the "Add” Button next to the product material type for “Tools or Tool Kits”.

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

Tool or Tool Kit fields include:

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

- 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

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UCEDD-only, LEND-only, DBP, and LEAH Programs.

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

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

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

- Product "Material Type", based on your selections in the prior screen, e.g., “Tools or Toolkits”.

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

  The field is displayed and required for all program types.

- The "Author(s)" field allows you to supply the name(s) of the author(s) for the tool or tool kit. Semi-colons must separate each name.

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 "Add this person" to move them into the text box below the drop-down menu. You can do this for multiple people. The system will

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

First, save the Product 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 during the fiscal year, or

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

The field is displayed and required for all program types.

- "Author Type", to identify if the author(s) are faculty members, trainees, or staff. Select all that apply.

  The field is displayed and optional for all program types.

- Date of release, or the date the tool or toolkit was posted. You can enter either the month or the month and year.

  The field is displayed and required for all program types.

- You must describe the tool or tool kit.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

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The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

The field is displayed and required for all program types.

- "Target Audience", to provide additional context on who the product is intended to support, such as if the tool or tool kit was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

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The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the "To Obtain Copies" field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the tool or tool kit, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the tool or tool kit in the NIRS Public Search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

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- "Brief Description", to provide a brief overview of the topics discussed in the tool or toolkit. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

  The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

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

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type "Tools or Toolkits":

1) Select "Add Product" from the Products Dataset navigation menu.
2) In the "Total Type Items" column, locate the number listed for material type "Tools or Toolkits". The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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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7.16 Adding New Records with Product Material Type “Web-based products” in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Adding New Records with Product Material Type “Web-based products” in the Products Dataset”. This video will demonstrate how to create a new and edit an existing product record with material type “Web-based products”.

Examples of Web-based products include blogs, podcasts, wikis, web portals, social networking sites, and webinars.

NIRS users with access to the Products Dataset can add new and edit existing product records. If you have access to the Products Dataset, you will see it in the navigation menu at the top of the page when logged into NIRS.

To add a new product record in the Products Dataset, click on "Add Product" from the Products Dataset navigation bar.

On the page, there is a table where each row is dedicated to each product/publication type:

- The first column, “Product/Publication Type”, lists each material type. Each Type includes a "Read more" link that opens a new window with the material type's definition and examples.
- The second column, “Manage”, contains a link to the online form to add a new record.
- The “Total Type Items” column displays the number of records entered for each product material type in the current data collection year. Clicking this number will show all associated records for that product type.

Keep in mind that the online form for each material type is unique.

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Click on the "Add" Button next to the product material type for "Web-based products".

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

Web-based product fields include:

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

- 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 Product records with "LEND" or "UCEDD" + "LEND" selected will be included in Standard Reports in the Products Dataset intended to assist in reporting to MCHB.

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

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

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- Product "Material Type", based on your selections in the prior screen, e.g., “Web-based products”.

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

  The field is displayed and required for all program types.

- Date the product was developed, or the date when the web-based product was posted. You can enter either the month or month and year.

  The field is displayed and required for all program types.

- The "Include(d) into DGIS/EHB export for" field allows LEND, LEAH, and DBP Programs to identify records that were disseminated within the current year of data collection. Records will be included in data export tools available to assist Programs with dissemination reporting requirements to MCHB.

  The field defaults to the current year of data collection. You may also click on the drop-down to select the applicable year.

  The field is displayed and required for all program types.

- The “Type” is the format of the web-based product, such as a podcast, video clip, wiki, or social networking site, and so on.

  When selecting the “Other” option, you must describe the product in the text box provided.

  The field is displayed and required for all program types.

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- "Target Audience", to provide additional context on who the product is intended to support, such as if the product was written to assist families, professionals who work with people who have disabilities, policymakers, and/or students.

  The field is displayed and required for all program types.

- Product Dissemination, which allows UCEDDs to report product dissemination to ACL.

  Select the checkbox to include the product in dissemination counts for the current year of data collection and the UCEDD Annual Program Performance Report (PPR).

  The number that can be put into the Product Dissemination field may reflect:

i. Number of products created during previous and current years and disseminated during the current Fiscal Year (check box): which represents the number of individual products disseminated during the year, regardless of when they were developed. This number includes both old (created during previous years) and new (created this year) products. This is represented as a checkbox on the online form.

   For example, if your Center disseminated 40 Products between July 1 and June 30.

   The field is displayed and required for all program types.

ii. Quantity of disseminated materials: which is optional and not required for reporting. If you choose to report dissemination quantities, you can enter them directly through the Product Dissemination Tool. A text box is provided for you on the online

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form to enter the number of copies disseminated for each individual product.

For example, if your Center distributed 10 copies of a product, you would enter 10 as the quantity disseminated.

The field is displayed and optional for all program types.

- You must enter either an email address or a website URL in the “To Obtain Copies” field. If you provide an email address, be sure it is actively monitored, as this field is visible in the NIRS Public Search.

  The field is displayed and required for all program types.

- A text box is provided to supply the "APA Citation" for the web-based product, if applicable.

  The field is displayed and optional for all program types.

- Keywords 1-5 to identify up to five (5) keywords or phrases that are commonly used to determine the specific topic. These will help the public locate the web-based product in the NIRS public search. No duplicate keywords are allowed.

  These fields are displayed and optional for all program types.

- "Brief Description", to provide a brief overview of the topics discussed in the web-based product. While the field is not required, it is highly recommended to provide a description, because this field is included in the NIRS Public Search as a searchable field.

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The field is displayed and optional for all program types.

- The "Alternative Formats" field lets you identify the format that the product was provided, such as if it was provided in braille, audio, or a language other than English. If you select "language other than English", you will see a drop-down menu with additional languages. You may use the "add new language" text box if you do not see the language(s) listed in the options provided.

  The field is displayed and optional for all program types.

- Supply the cost per copy of the product in the "Ordering Information Cost" field. Commas are not allowed, though decimals may be used, for example, 23.99.

  The field is displayed and optional for all program types.

- You can use the "Ordering Information Name" field to provide a contact person who will be listed on the record in the NIRS Public Search and Network Member directory. This should be someone who can provide details about the product and who is employed by your Center/Program, such as the principal investigator or project manager. Keep in mind that policymakers may contact an individual for dissemination or collaboration purposes using the NIRS Public Search.

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

1) If the faculty member has a profile, navigate to the Directory Dataset and select "Manage Faculty/Staff Profiles". The status option field in the user's profile controls how the person is listed in the Network Member Directory, "Ordering Name" field in the

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Products Dataset, and "Contacts" field in the Projects Dataset. This option will work if they are on the list and their display status is “Display” in Online Directory or “Do Not Display” in Online Directory. You can refer to detailed instructions in the Network Member Directory section of the Learning Modules.

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

   The field is displayed and optional for all program types.

Once you are done making your selections, save the page.

To edit existing Product records with material type “Web-based Products”:

1) Select “Add Product” from the Products Dataset navigation menu.
2) In the “Total Type Items” column, locate the number listed for material type “Web-based Products”. The number is zero if no records exist for the material type.
3) Click on the number to view and edit the associated Product material type 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.

7.17 Managing Existing Product Records

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

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Please note that only users with access to the "Products" Dataset can access it.

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

1. Click on the Products Dataset and select "Add Product". In the "Total Type Items" column, a highlighted number can be clicked on to view records within each product material type. Use this method to view all records for a specific product material type in the current year of data collection.
2. Click on the Products Dataset and select "Manage Products" in the navigation menu. Use this method to view all Product records for the current year of data collection.

On the "Manage Products" page, you will note that you can access a search function in the top right-hand corner. You will also find a data dictionary that opens a pop-up window. The Data Dictionary is a helpful resource for clarifying the definition of fields and form options.

Going on down the page, you will see the list of records. Each record has:

- The title of the Product is highlighted in blue. If you click the title, it will take you to a "view only" screen, where you can review the record without editing it.
- The "manage" column has an icon with three dots next to each record.
- The product material type.
- The date that the record was created and last edited.

To manage (edit, view, delete) existing Product 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 Product record,
ii. "View" to review the record without editing responses, 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

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cannot be undone.

Product 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 Product record, you should select the "Edit" option. This will take you to a form where you can edit record entries.

You should review the responses provided to ensure that they are complete and accurate.

Be sure to save the page once you have completed the desired edits. Select the "Cancel" option if you do not want to save your changes or want to revert your changes.

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.

7.18 Overview of the "Advanced Search" function in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Overview of the Advanced Search function in the Products Dataset". This video explains how to use the "Advanced Search" function in the Products 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,

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- To search for products related to specific "keywords" or topic areas, such as deliverables related to a specific topic, e.g., Fetal Alcohol Syndrome (FAS) across the years,
- To locate products by title, which may be helpful when entering new records to reduce duplicate data entry,
- To search for products with a specific person of contact, and
- To search for products that are offered in a specific format, e.g., braille books.

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

  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 textbox. The "Keywords" will search for all mentions of the phrase or word in the Product record's "title", "keywords", and "brief description" fields.

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- Below the “Keywords” 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.

        "CONTACT" means that it originates from the directory form in the Directory Dataset, "PRODUCT" means that it originates from the products form in the Products 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)" 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.

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"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 matches 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 matches 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.

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

For example, let's say you are trying to locate all Products that your Center/Program has developed over the years that are offered in braille. You might recall that there is an "Alternative Formats" field located near the bottom of the Product record form that you can use. Follow these steps:

- For "Fiscal year(s)" select "All Years". If needed, click on the "X" button to remove the selections, and select "All Years" from the drop-down menu.
- Leave "Keywords" blank.
- In the "Selection Criteria", there are three sections. In the first box, you need to identify the field. You also know that the "Alternative Formats" field is located in the products form in the Products Dataset. As you scroll through the options, you will find one listed "PRODUCT Alternative Formats (L)", which means that it is from the Products Dataset form, the field is called "Alternative Formats" on the online form, and it is a list field.
- In the comparator, select "equal to" to identify any products with a specific selection.
- In the last field, select "Braille" from the drop-down option menu.
- Click "Search" highlighted in blue at the bottom of the page to find all records that could match the product.

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

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

- Product title,

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- The "Manage" column, which allows you to edit the contents of the product record, view the record without editing it, or delete the record.

  The option to "Edit" and "Delete" are only available for records from 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.
- When the record was created and last edited.

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

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

As a general rule of thumb, 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 Products Dataset form or the Directory Dataset form open in another browser. For example, if you are using Google Chrome, open NIRS in Microsoft Edge to follow along with the form and guide your process in the "Selection Criteria" section.

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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7.19 The "Save as New" Feature in the Products Dataset

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

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

1. To change the product material type for an existing record, and
2. To bring the Product record 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 deliverables in the Products Dataset. Later, you realize that you accidentally selected the wrong product material type for one of the entries.

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

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

Find the Product 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 Material type—" drop-down menu, select the desired product material type, 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. Please keep in mind that all

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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, cost amounts for the current fiscal year, and so on.

Please note that each product material type has a unique set of fields. You may need to plan data entry accordingly for any additional information required for the specific product material type. For example, if changing the product material type of a record from a scholarly journal that has been submitted to a product material type of scholarly journal accepted/in press, the form will ask for additional information on the article DOI, volume, pages, and supplement.

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 product has the correct date, APA citation, and review the brief description.

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 have finished creating the new record, there is one last step: you must delete the old record.

i. Return to the Products Dataset and select "Manage Products".
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.

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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 iteratively publishes an annual newsletter to highlight training efforts and inform stakeholders about your Center/Program's impact for and with people with disabilities in the community. 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:

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

   Alternatively, go to the Products Dataset and select "Add Products" 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 "2026" option.

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

ii. Next, click on the desired record's title highlighted in blue.

iii. In the "—New Material type—" drop-down, select the applicable product material type. Click the green "Save as New" button.

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. Once you are done making any changes and you have updated the record for the current year of data collection, save the page.

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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 product 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.

7.20 The "Product Dissemination" Tool in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "The “Product Dissemination” Tool in the Products Dataset". This video will discuss the tool's purpose and demonstrate how to use it.

UCEDDs use the Product Dissemination Tool to report the number of products that your Center disseminates to your communities from products within the current and prior year(s) of data collection. You may optionally track the number of copies of each product disseminated, which is listed under "quantity of disseminated materials".

Keep in mind that products listed in the Product Dissemination tool are listed from data entry that has been completed from this year and prior years of data entry at your Center/Program. If you need to enter a new product record or note that a record that should be listed is not present in the tool, you will need to see if you can locate the record. If it is not successfully located via an advanced search, then you will need to enter it into the Products Dataset via "Add Product" if entering it in the current year of data collection.

To access the Product Dissemination tool, go to the Products Dataset and select "Product Dissemination" on the left-hand column.

At the top right-hand side of the screen, you will once again see a search feature to easily view records within specific year(s), a link to the Advanced Search, and the data dictionary, which contains definitions on every field.

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On the page, you will see a description of the tool and instructions on how to navigate it. You will also see a summary table of the number of products selected in the tool for the current year of data collection only, and the number of copies of each product disseminated if your Center/Program tracks that information. Next to the table, you will see the "REVIEW | UPDATE" button in blue.

Let's explore the tool together. First, I will explain the different parts of the tool. Then, we will go over each section one at a time.

Click on the blue "REVIEW | UPDATE" tool button.

This will bring up a pop-up window. At the top of the page, you will see three sections listed:

i. "Select Years",
ii. "Select Products", and
iii. "Report disseminated quantities".

These are the three sections of the tool you need to complete to accurately report products disseminated in the UCEDD Annual Program Report (PPR). You will also note that the active section will be highlighted in blue while the other sections will be gray.

In this case, it defaulted to the "report dissemination quantities," which is entirely optional. In the middle of the screen, you see a list of products, with a line under each listing the number of copies disseminated for that product.

Below this, you will see four buttons:

i. "Previous" to go to the prior section. For example, if you are on the "report dissemination quantities", it will move you to the "Select Products" section.
ii. "Close window without saving selections", which will cancel any changes that you have made to the tool. No changes will be saved.

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iii. "Save Data into Report and Close Window" to save your progress.
iv. "Clear All Selections" to start over with no options selected.

Let's go to the "Select Years" screen. Click "Previous" twice.

Now that you are on the "Select Years" tab, you will see a list of years that you can select. You will also note that the buttons at the bottom have changed to the following:

i. "Close window without saving selections", to close the tool without saving changes,
ii. "Next" to go to the next section. In this case, if you select "Next", you will go back to the "Select Products" Screen.

For our example, we will select "2027" for the current year of data collection, and the two previous years, 2026 and 2025. You can select as many years as you desire. Click "Next" to go to the "Select Products" section.

On the "Select Products" section of the tool, you will also note that the buttons at the bottom have changed to the following:

i. "Previous" to go back to the "Select Years" section,
ii. "Close window without saving selections", to close the tool without saving changes,
iii. "Next" to go to the next section. In this case, if you select "Next" you will return to the "Report dissemination quantities" section we started with.

In the "Select Products" section, you need to determine which products your UCEDD disseminated this year and from prior years. Select the applicable fiscal years in which those products were created.
You will see a list of all products that have been entered in the Products Dataset listed alphabetically within each of the fiscal year(s) that were selected from the "Select Years" screen.

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For example, you will see titles for all product records for 2027 that have been entered in the Products Dataset. All records are listed alphabetically. As you scroll down, you will eventually see all products from 2026, and then again for 2025 because we selected both of those years as well.

Next to each product, you can check the box to include the record in the report. Select all records that your UCEDD has disseminated.

For example, if your Center created a product in 2025, and you are still using and disseminating that product in 2027, you will scroll to 2025 products, locate the title of the product that was disseminated, and select the check box next to it. That will include it in the report.

Again, if you do not see a product that should be listed, you need to search for it using an “Advanced Search" in the Products Dataset. If the record should have been entered in the current year of data collection and you did not locate the record using the Advanced search, you will need to add a new product.

Once you have made all your selections, click "Next" to go to the "Report dissemination quantities".

This is the end of the required sections of the tool. If your UCEDD does not track the number of copies of each product that were disseminated, you should click "Save Data into report and Close Window".

Suppose your UCEDD tracks the number of copies or quantities disseminated for each product record. In that case, you can enter the number of copies in the box provided under each product record.

As before, the products listed are only those selected in the previous section, "Select Products". Each product will be listed alphabetically within each fiscal year.

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If you need to go back to another section of the tool, you can easily navigate using the "Next" and "Previous" buttons. When you are ready to save the report, return to the "report dissemination quantities" section and save the report at the bottom.

Once saved, you will see that the summary table updates automatically based on your selections in the report.

That is all you need to do to navigate and complete the Product Dissemination tool.

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.

7.21 Overview of Standard Reports in the Products Dataset

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

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

To access the reports, you need to have NIRS Administrator access to the "Products" Dataset. In the Products 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.

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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 from the spreadsheet as well, so that I can filter by field headers or upload it to analytical software.

There are two Standard Reports for the Products Dataset that deserve special attention:

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

- Duplicates. This Standard Report helps to check whether a product has multiple titles with the same name. Each product should have a unique title, so you should correct duplicate products. You might include adding the date to the end of the title if it is a sequence of

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deliverables or the topic of a webinar series. Click the product title in blue to open the product record edit page and update the product's title.

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

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.

7.22 Overview of Custom Reports in the Products Dataset

Welcome to the video of the "Products Dataset" section of the NIRS Learning Modules titled "Overview of the Custom Reports in the Products Dataset". This video will discuss the purpose of Custom Reports and demonstrate how to create a Custom Report in the Products 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 Products 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 Products Dataset by clicking on the Products Dataset and selecting "Custom Reports" under the right-hand column in the navigation menu.

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

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

Custom Reports that have already been created can be organized into categories. Custom Reports that were created in the past will be listed in the applicable category. There is also a category for Custom Reports that do not have one. Click on the "+" sign next to the category to expand each category to view the existing Custom Reports.

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

For each Custom Report, you will see:

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

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

  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

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from the results. The selection criteria in the Custom Reports have three sections:

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

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

   "CONTACT" means that it originates from the directory form in the Directory Dataset, "PRODUCT" means that it originates from the products form in the Products 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.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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category to refine your search. For text boxes, type in the box provided.

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

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

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

- 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 cost amount for products within a specific category.

Let's consider an example. Let's say you have a postdoctoral trainee who is interested in other products developed in the field of fetal alcohol spectrum disorders (FASD) to brainstorm ideas for their research. Follow these steps:

- In the "Title", you could call it "FASD-related Products"
- I will keep the "Default" set to "Browse" because I prefer to view results in a web browser.
- For "Category", you could enter "Trainee Requests".
- For "Notes", leave a brief note on the purposes of the Custom Report.

  For example, say that this Custom Report is intended to assist current trainees in locating FASD-related deliverables to generate ideas for future research.

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- For "Selected fields", these are the fields from the online form. There are five (5) fields that I am interested in, 1) the fiscal year the product, was created, 2) product title, 3) the author field for contact purposes, 4) the brief description, and 5) the keywords fields (numbered 1-5).

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

  You know that all fields are listed in the Products Dataset record form, so you are looking for selected fields with "PRODUCT" 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:
  - "PRODUCT Title (T)",
  - "PRODUCT Fiscal Year (N)",
  - “PRODUCT Author(s) (T)”,
  - "PRODUCT Brief Description (T)", and
  - "PRODUCT Keywords (T)". There are a total of five of these fields, numbered one (1) through five (5).

- For "Selection Criteria", you are interested in FASD-related research. You can restrict the parameters using either the title or the brief description field. For this training, use the "Title" field.

  For selection criteria, select "PRODUCT Title (N)" in the first box, "like" in the second box, and type "FASD" in the third box.

  Change the comparator just below the first selection criteria to "OR" to widen the search parameters. You will do this because you want to search for additional matching words in the title. Keep in mind that this will apply to all criteria below it. For example, if you entered an additional criterion, it would search for criterion 1 OR criterion 2 OR criterion 3, etc.

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Again, select "PRODUCT Title (N)" in the first box, "like" in the second box, and this time type "Fetal Alcohol Spectrum Disorders" in the third box.

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

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

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

You can also click "Present Results In" to select a different method for viewing 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 you can easily revert to the previous version until you finalize your query.

When creating Custom Reports, you may consider the following:

- Ask, "What do you want to capture in the Custom Report?"
- Break down your question into simple, actionable steps to help guide your process.
- Begin with testing "selected fields" first.
    - Selected fields are the list of questions in the online form that you want to include in the report.
- Ask, "Which data points will help me verify the data I matched to?". These pieces of data may be helpful to include in "selected fields".

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- 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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