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8.0 NIRS Reporting for LEND, LEAH, and DBP Programs – 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.

It is recommended that you review the previous learning modules before continuing, as the “NIRS Reporting for LEND, LEAH, and DBP Programs” series builds on concepts introduced in earlier sections.
For additional guidance, watch the following instructional videos organized by topic:

Starting with the Trainees Dataset:
If you're new to the Trainees Dataset or need help accessing it, begin with “Overview of the Trainees Dataset”. This video explains what the dataset is, who uses it, and how to gain access.

If you need to create or update trainee records, watch “Adding New Long-/Medium-Term Trainee Records” and “Managing Existing Long-/Medium-Term Trainee Records”. These videos walk through the process of creating new records and updating existing ones in the Trainees Dataset.

For guidance on former trainee surveys, watch “Surveying Former Trainees”. This video explains how to manage former trainee surveys and the associated reporting requirements.

If you would like to learn more about the reports available in the Trainees Dataset, watch “Overview of Standard Reports in the Trainees Dataset”. This video demonstrates how to use the Standard Reports to review your data and identify records that may need attention.

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For the Products Dataset:
If you're new to the Products Dataset or need help accessing it, begin with "Overview of the Products Dataset and Product Material Types". This video explains what the dataset is, who uses it, and how to gain access.

If you need to create product records, watch the corresponding video that demonstrates data entry in each material type:

- "Adding New Records with Product Material Type "Academic Course Development" in the Products Dataset",
- "Adding New Records with Product Material Type "Book" in the Products Dataset",
- "Adding New Records with Product Material Type "Book Chapter" in the Products Dataset",
- "Adding New Records with Product Material Type "Conference presentations and posters presented" in the Products Dataset",
- "Adding New Records with Product Material Type "Distance Learning Modules" in the Products Dataset",
- "Adding New Records with Product Material Type "Doctoral Dissertation or Master's Thesis" in the Products Dataset",
- "Adding New Records with Product Material Type "Newsletters" in the Products Dataset",
- "Adding New Records with Product Material Type "Other" in the Products Dataset",
- "Adding New Records with Product Material Type "Pamphlets, Brochures, or Fact Sheets" in the Products Dataset",
- "Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals Published/In Press" in the Products Dataset",
- "Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals submitted" in the Products Dataset",
- "Adding New Records with Product Material Type "Press Communications" in the Products Dataset",

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- "Adding New Records with Product Material Type "Reports and Monographs" in the Products Dataset",
- "Adding New Records with Product Material Type "Tools or Toolkits" in the Products Dataset", and
- "Adding New Records with Product Material Type "Web-based products" in the Products Dataset".

The video titled "Managing Existing Product Records" walks through the process of updating existing product records.

If you would like to learn more about the reports available in the Products Dataset, watch "Overview of Standard Reports in the Products Dataset". This video demonstrates how to use the Standard Reports to review your data and identify records that may need attention.

Finally, for gaining administrative access, watch the video titled "Relationship between NIRS and Reporting Requirements from the Federal Funder" which walks through how to gain access to the Admin section to review federal reporting and provides an overview of reporting requirements for LEND, LEAH, and DBP Programs.

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

8.1 Data Cleaning in Trainees Dataset

Welcome to the video of the "NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "Data Cleaning in the Trainees Dataset". LEND, LEAH, and DBPs report trainee data in the Autism CARES Module and MCHB DGIS reporting platform.

This video will outline the steps you have to complete to provide accurate data in the Trainees Dataset for the Autism CARES Module completed in NIRS, as well as the data export files to assist with transferring records to MCHB's reporting platform (DGIS).

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If your Center has fewer than 100 trainee records, you may complete the data review throughout July. It is highly recommended to start reviewing your data before July if your Center/Program has 100+ records to review and validate.

The reporting period ends on July 31. Your records will be locked for editing on August 1 of each year as NIRS moves into the new year of data collection, making it imperative that your Center/Program has complete and accurate data before July 31.

Data Cleaning ensures that your data is complete, accurate, error-free, and accurately reflects the impact of your Center/Program.

Data Cleaning is completed in three iterative stages before completing reporting to federal agencies:

1. Enter data into each applicable Dataset,
2. Run Standard Reports, and
3. Review records.

A tip sheet on data cleaning in NIRS can be found on the AUCD UCEDD Resource Center website. From aucd.org/urc, click on the "Training Courses, Demos, Tip Sheets" under the NIRS tab. The "Data Cleaning in NIRS" resource details common errors that affect data quality and the import of records into MCHB's reporting software.

Let's start with Standard Reports. There are several Standard Reports in NIRS to assist with data cleaning in the Trainees Dataset. Both reports are found in the Trainee Dataset, section "Standard Reports", under the "ALL" column.

The "Trainee Data Entry Errors" report lists errors in your trainee records. To resolve the issue, read the error under the "Missing or Other Error" header and then click on the Trainee's name listed in blue in the "Name" header. This will take you to the record to edit. Save the page once all corrections have been made. Rerun the "Trainee Data Entry Error"

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Standard Report in the Trainees Dataset. If successful, the record will no longer be listed.

The "Trainee Duplicates" will help you to identify if a trainee, long/medium-term or short-term, has duplicate records. Click on the Trainee's name highlighted in blue to be taken to the Trainee's record.

Data Coordinators should run both reports throughout the reporting period. Every effort should be made to resolve each of the errors listed in the report(s).

After the errors are resolved, the next task is to review the records.

To review records, navigate to "Manage Long/Medium Term Trainees" in the Trainees Dataset navigation menu. You will see two “Manage” columns, one for the main record and another for the annual record(s). You should review each main and annual record. The main record contains contact and demographic information, while the annual record contains information specific to their training experience and didactics.

Click on the three dots under the "Manage Main Rec" column and select "edit".

In the main record, it is critical to ensure that the Trainee has a valid primary email address.

Best practice for former trainees is to provide a primary email address from a personal email account (e.g., Hotmail, Gmail, etc.) to streamline surveys conducted two (2) and five (5) years after they graduate from your training Program. If a trainee cannot provide an email address or the Trainee is deceased, enter the email address of a faculty/staff person or email group from your organization that can be reached regarding that Trainee.

Going down the form, other common errors in the main record include:

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- The first and last name fields should be checked to ensure that names are spelled correctly. Responses such as "N/A", "None", "Test", "TBD", "Update Later", or other fake names must be corrected.

- You should ensure that the addresses listed are error-free and not fake.

- For the "position of trainee at admission" and "position title at admission" fields, responses such as "N/A", "None", "Test", "TBD", "Update Later", or other placeholders must be corrected.

Every effort should be made to enhance your ability to track trainee alum outcome data.

Repeat this process and save the page after each Trainee's main record to preserve updates.

Go back to the "Manage Long/Med term Trainees" screen in the Trainees Dataset. Select "Edit" by clicking on the three dots under the "Manage Annual Rec" column.

Critical fields reported in the Trainee Annual record include:

- The "Degree Program" and "Discipline" fields must provide a valid degree. Responses such as "N/A", "None", "Test", "TBD", "Update Later", or other placeholders must be corrected,

- Ensure that the "Year Start" and "Completion Date" fields are in the correct format: MM/YYYY. For example, July must be written as a two (2) digit month (07 instead of 7), followed by a four (4) digit year (2026 instead of 26), and

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- For co-located UCEDD/LEND Centers/Programs, ensure that the Trainee is correctly identified as a UCEDD and/or LEND Trainee. LEND-only trainees and UCEDD/LEND trainees are reported to MCHB.

The following common errors should also be corrected in the annual record related to the following textbox fields:

- "Position in Program"
- "Other Discipline – Please Specify"
- "Other Support Type Description"
- "Presentation(s) by the Student this year".

Each field should be reviewed to ensure that they are free of grammatical errors and that responses such as "N/A", "None", "Test", "TBD", "Update Later", or other placeholders are corrected.

Every effort should be made to enhance your ability to track trainee alum outcome data.

Repeat this process and save the page after each Trainee's annual record to preserve updates.

Changes to the main and annual records for current trainees will be reflected in the Standard Reports in the Trainees Dataset and in export files in the Admin 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.

8.2 Data Cleaning in Products Dataset

Welcome to the video of the "NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "Data Cleaning in the Products Dataset".

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Keep in mind that the LEND and DBP Programs report on product data. LEAH Programs do not report on products.

This video outlines the steps you have to complete to provide accurate data in the Products Dataset for the Autism CARES Module completed in NIRS, as well as the data export files to assist with transferring records to MCHB's reporting platform (DGIS).

If your Center has fewer than 100 product records, you may complete the data review throughout July. It is highly recommended to start reviewing your data before July if your Center/Program has 100+ records to review and validate.

The reporting period ends on July 31. Your records will be locked for editing on August 1 of each year as NIRS moves into the new year of data collection, making it imperative that your Center/Program has complete and accurate data before July 31.

Data Cleaning ensures that your data is complete, accurate, error-free, and accurately reflects the impact of your Center/Program.

Data Cleaning is completed in three iterative stages before completing reporting to federal agencies:

1. Enter data into each applicable Dataset,
2. Run Standard Reports, and
3. Review records.

A tip sheet on data cleaning in NIRS can be found on the AUCD UCEDD Resource Center website. From aucd.org/urc, click on the "Training Courses, Demos, Tip Sheets" under the NIRS tab. The "Data Cleaning in NIRS" resource details common errors that affect data quality and the import of records into MCHB's reporting software.

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Let's start with Standard Reports. There are several Standard Reports in NIRS to assist with data cleaning in the Products Dataset. Both reports are found in the Products Dataset, section "Standard Reports", under the "ALL" column.

The "Product Data Entry Errors" report lists errors in your product records. To resolve the issue, read the error message under the "Missing" header, then click the record listed in blue under the "Title" header. 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.

The "Duplicate Products" will help you check whether a product has multiple titles with the same name. Click the product's name in blue to open the product record. Product records must have a unique title within the same year for data collection. Common solutions include adding the date of dissemination, a series number, or a version number to the title.

Data Coordinators should run both reports throughout the reporting period. Every effort should be made to resolve each of the errors listed in the report(s).

After the errors are resolved, the next task is to review the records.

To review records, navigate to "Manage Products" in the Products Dataset navigation menu. Select "Edit" by clicking on the three dots under the "Manage" column. To view all records in a specific material type, you may alternatively navigate to "Add Products" and click on the number listed under the "Total Type Items" column.

Critical fields to review in the Products Dataset include:

- For co-located UCEDD + LEND Centers/Programs, ensure that the correct "Program Type" is selected for each record. Only LEND-only and UCEDD/LEND records are included in the reporting to MCHB

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- Each record must also have a unique title.

- If author(s) are provided, ensure that the names provided are free of spelling errors. Common errors include "N/A", "None", your Center/Program name, or other placeholders.

There are several publicly available fields through the NIRS Public search to facilitate cross-agency and partner collaboration.
To avoid errors in those fields, be sure that:

- The "To Obtain Copies" field must be a valid email address or URL. Examples of incorrect entries might be "N/A" and different forms, such as "no," "NA", “etc.”, "None", "see the author(s)", "first/last name", any text other than a valid email address or URL, e.g., "Epub ahead of print", "TBD", or "Unknown".

- The "Publisher" field should also be reviewed for various N/A responses, such as "In press", "N/A,", and different forms, such as "no," "NA", “etc.”, "Unknown", "Under review", "Peer-reviewed article", or "Preparation for Submission".

- The "Product Description" field should also be reviewed. It is recommended to use plain language and include keywords to help others locate your record.
  Every effort should be made to enhance tracking of deliverables, disseminations, collaborations/partnerships, and to accurately show the impact of the developed products at your Center/Program.

Changes to the product records will be reflected in the Standard Reports and in export files in the Admin section.

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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.

8.3 Relationship Between NIRS and Reporting Requirements from the Federal Funder

Welcome to the video of the " NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "Relationship between NIRS and Reporting Requirements from the Federal Funder". This video will discuss the history of NIRS and LEND, LEAH, and DBP reporting and how NIRS supports LEND, LEAH, and DBP Programs in completing reporting requirements.

Beginning in 2003, LEND programs began using NIRS to collect data elements required for reporting to HRSA and MCHB. Three years later, in 2006, Leadership Education in Adolescent Health Programs (LEAH) and Pediatric Pulmonary Center (PPC) training Programs started tracking current and former trainee surveys through NIRS. The MCHB-funded Developmental Behavioral Pediatric (DBP) training Programs began using NIRS in 2009.

The Performance measures and program assignments are used by Programs to comply with reporting requirements.

Programs are expected to review the DGIS forms annually to ensure Program processes align with the most recent guidance. The DGIS forms are posted on MCHB's website. To access them, navigate to HRSA/MCHB's website at https://mchb.hrsa.gov/. Under the "Data and Research" tab, the DGIS forms are found under the "Discretionary Grants Information System (DGIS)" page (https://mchb.hrsa.gov/data-research/discretionary-grants-information-system-dgis).

The main benefits of NIRS include:

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- NIRS is updated annually based on new performance measures outlined in the Discretionary Grants Information System (DGIS) forms, which detail all Programs' reporting requirements.

- AUCD works closely with HRSA and MCHB to ensure that NIRS is updated annually to reflect changes.

- While MCHB's reporting software is only open for two to three months of the year, NIRS allows Programs to prepare a subset of forms year-round. NIRS provides tools and reports to help Programs prepare and comply with reporting requirements.

Additional reminders for reports include:

- LEND programs are not required to enter financial information into the Projects Dataset to meet requirements from MCHB. LEND Programs may enter financial information into the Projects Dataset, which includes several reports designed to support LEND reporting needs.

  As a reminder, for co-located UCEDD/LEND Centers/Programs, note that records with Program type UCEDD-only are not included in tools and reports that support MCHB reporting.

- As of 2026, LEND and DBP Programs report on current long-term trainees, former trainee surveys, and products/deliverables.

- As of 2026, LEAH Programs report only on current trainees and former trainee surveys.

- Historically, AUCD exported Program data from NIRS, which would then be uploaded into DGIS, a process called the "NIRS-DGIS Export/Import Process". Starting in 2025, this process was discontinued due to changes in federal processes.

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AUCD's NIRS team developed a tool ("DGIS Review 2025+") to help Programs easily transfer NIRS data to the DGIS system for Trainees (Long-Term and Former) and Products (see training video on “DGIS Export Tool (DGIS Export 2025+)”).

- LEND, DBP, and LEAH Performance Reports typically open in early July and must be submitted by the end of September or October, depending on the report type. It is important to check the Electronic Handbook (EHB) or contact your Project Officer at MCHB to verify the due date.

- LEND and DBP Programs complete the Autism Collaboration, Accountability, Research, Education, and Support Act (Autism CARES) module in NIRS. The Autism CARES Module ensures support for research, services, prevalence tracking, and other government activities. The module opens in NIRS in June each year and must be submitted in NIRS by the end of July.

Administrative access is required to access the Autism CARES Module. If you have administrative access, you will see that the Admin section is viewable in the navigation menu when logged into NIRS.

The Autism CARES Module is accessed by selecting "CARES Evaluations" under the Admin section navigation menu.

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

1. Log in to the NIRS application by going to aucd.org, clicking on the "About” Section and select "NIRS Login". Ensure you are on the correct login screen. Enter your credentials and select the name of your Center/Program from the drop-down menu.

2. Navigate to the Admin section “Manage NIRS Users Profiles” screen. Click on the three dots next to their name and select "Edit" to update

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their credentials.

3. Select the "Admin" option for the "Level of access" field. A description of each access level is also provided at the bottom of the page. Save the page.

Now the NIRS user will find that they have access to the Admin section on the navigation menu.

Programs should contact their project office at MCHB for any questions on what activities count for each performance measure. Programs should also contact MCHB for questions on classifying records within a specific topic area.

For questions on accessing NIRS resources on AUCD's ITAC website, message mchengage@aucd.org.

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.

8.4 DGIS Export Tool (DGIS Export 2025+)

Welcome to the video of the "NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "DGIS Export Tool". This video demonstrates how to use the NIRS “DGIS Export 2025+” tool.

The NIRS “DGIS Export 2025+” tool allows Programs to export all reportable data from Trainees, former trainee surveys, and Products at the end of the year. Programs should use the tool:

1) As a review tool to assist with data cleaning efforts,
2) To export all data from NIRS and, in tandem with MCHB's import templates, transfer data manually to MCHB's reporting platform (DGIS).

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To access the tool, you must have administrative access.
Select the NIRS "DGIS Export 2025+" tool in the Admin section.

On the page, you will see the name of your Center/Program as it appears in NIRS and the following tool options:

- "Fiscal Year" – It is recommended to select a single year when running the tool, as forms vary across years of data collection.

  The current reporting year will be selected by default.

- "Added on or after" – an optional field that allows you to enter two dates to refine your search for records within a specific time frame.

- "Include only" – this field has three options with checkboxes.

  A) Select the "trainees" checkbox to export current long-term trainees and former trainee surveys from alumni who completed the survey two and five years after graduating from your Program. By clicking the "Export" button, you will generate two files:
  - One for current trainees
  - One for former trainee survey responses.

  B) Select the "Publications, Conferences, and Web-based Products" checkbox to export products entered in the selected year of data collection from material types "Peer-reviewed publications in scholarly journals Published/In Press", "Peer-reviewed publications in scholarly journals submitted", "Conference presentations and posters presented ", and "Web-based products" in the Products Dataset. This option is for LEND and DBP Programs. This option exports a single file with three tabs. Each tab contains products for one material type.

  C) Select the "Products and Submissions Data" checkbox to export products entered in the selected year of data collection from material types:

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- Academic Course Development,
- Distance Learning Modules,
- Doctoral Dissertations and Master's Theses,
- Other,
- Book Chapter,
- Book,
- Reports and Monographs,
- Newsletters,
- Pamphlets, Brochures, or Fact Sheets,
- Press Communications, and
- Tools and Toolkits

  This option will export eleven (11) files, one for each product material type.

Once you have exported data, review the data in the Excel files before reporting to MCHB.

Review steps include:

1) Open each file:
   I. Ensure that all desired records are present.
   II. Go line by line and make sure that each response is complete, accurate, and free from grammatical errors.
   Please note that data entry must also be in English.

If you note any discrepancies, you need to return to NIRS and navigate to the applicable Dataset. Enter any missing records and edit the existing records. Then, regenerate export file(s) in the NIRS “DGIS Export 2025+” tool in the Admin section. Changes will be reflected in the export files.

You are ready for the next steps once all data is complete and accurate.

2) Log in to DGIS and download MCHB's import templates for Long-term and Former trainees, and publications. You must use the export

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files to copy and paste responses into MCHB's import templates. AUCD's templates cannot be used when importing data.

The rest of the report should be completed in MCHB's DGIS reporting platform. DGIS tutorials are available on MCHB's website through the Electronic Handbook. For the most up to date link to MCHB's DGIS tutorials, message a member of the NIRS team who will be able to assist you. In 2027, the link to the tutorials is: https://help.hrsa.gov/display/public/EHBSKBFG/DGIS+User+Guide. AUCD does not have access to MCHB's reporting platform.

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.

8.5 Overview of the Autism CARES Module for LEND and DBP Programs

Welcome to the video of the "NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "Overview of the Autism CARES module for LEND and DBP Programs". This video will discuss completing the Autism CARES Module in NIRS.

LEND and DBP Programs complete the Autism Collaboration, Accountability, Research, Education, and Support Act (Autism CARES) Module each year in NIRS. The Autism CARES Module is available for LEND and DBP Programs to provide quantitative data on their Programs to assist MCHB in evaluating the impact of CARES funding.

The Autism CARES module opens in June and must be submitted before the end of July each year.
The module is a short nine (9) question form that informs the impact of your LEND's and DBP's funding. The report covers a full year of data collection for its corresponding year. For example, the 2027 Autism CARES Module will cover initiatives completed July 1, 2026, through June 30, 2027. All questions are required.

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Administrative access is required to view the CARES Module.

To access the module:

- Log in to NIRS and select "CARES Evaluations" from the Admin section navigation menu.
  On the landing page, you will see CARES Modules organized by data collection year.
  You should locate the module for the current year of data collection at the top of the page.

- Locate the "CARES Evaluation for LEND/DBP (+ year)". Ensure that it is the correct reporting year.
  For example, the 2027 module is titled "CARES Evaluation for LEND/DBP 2027".

  Click on the three dots next to it.
  - If this is your first time accessing the module, you will see the "Add" option, which will populate the form for you.
  - If this is not your first time accessing the module, you will see the option "Edit" to make changes to the report, or
  - If you submitted the evaluation, click "View" to review a non-editable version of the evaluation.

  Click "Add" or "Edit" to enter the module.

- On the next page, you will see instructions at the top that you should read carefully to complete the module. There is also a link to the CARES Module Data Definitions in blue, which provides definitions from federal guidance for each module question.

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- The module can be edited or updated as many times as needed before submission. Click "Save" at the top of the page to save your information. You can then close the screen and come back later.

- The "Clear" option at the top of the page will remove all responses if you need to start over. Responses cannot be reverted once the form is cleared.

- The module has 4 sections:
  - Section 1: Topic Area I: Training Trainees (Questions 1 through 3),
  - Section 2: Topic Area II: Other Training Activities (Questions 4 through 7),
  - Section 3: Topic Area III: Service Delivery (Questions 8 through 9), and
  - Section 4: Topic Area IV: Research (Question 10)

- The Standard Report in Section 1 will pull responses from data entered in the Trainees Dataset.
  Question #1 on the number of long-, medium-, and short-term trainees has been purposely blocked. As that data is already provided in your annual performance report to MCHB, it is not included in the Autism CARES Module to reduce duplicate data entry.

- Standard Reports in Sections 2 and 3 pull data from the Activities Dataset.

  If you have not entered records in the Trainees Dataset or the Activities Dataset, the reports will not populate data to assist you with answering questions.

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To access the Standard Reports, scroll to the applicable section and click on the "click here" highlighted in blue under the section titles.

- Click in each of the text boxes for questions two (2) through ten (10). Type in numerical responses.

  Refer to the Data Definitions for the CARES Module for definitions on each question.

You can click the “SAVE” button at the top of the form which saves existing responses so you can return to complete the module at a later time.

If you have completed all questions and the module is ready for submission, scroll to the bottom of the CARES Module and click on the "Submit" button.

If you need to make any changes to the submitted module, message the NIRS team so we can reopen it for you.

For questions on classifying records, contact your Project Officer at MCHB.

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.

8.6 Overview of Custom Reports to Support Reporting for LEND, LEAH, and DBP Programs

Welcome to the video of the "NIRS Reporting for LEND, LEAH, and DBP Programs" section of the NIRS Learning Modules titled "Overview of Custom Reports to Support Reporting for LEND, LEAH, and DBP Programs". This video will walk through an example of using Custom Reports to pull data for MCHB reporting.

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Data Coordinators are tasked with verifying responses in performance measures for reporting to MCHB. Custom Reports can be used to search across records in the respective Datasets. Custom Reports allow you to select almost any field on the NIRS online form that is asked in an MCHB report.

To access Custom Reports, go to the applicable Dataset and select "Custom Reports" under the right-hand column in the navigation menu. All Custom Reports are unique to your Center/Program.

For this exercise, we will navigate to the Products Dataset “Custom Report” screen.

At the top of the page, you see a blue button, "ADD New Custom Report" to create a new report.

Custom Reports that have already been created can be organized into categories that will be listed on the page in the applicable order. There is also a group of Custom Reports that do not have a category. Those reports are grouped into the "no category" group. Click the "+" sign next to each category to expand it and view the existing Custom Reports.

When you expand the category, you will see the number 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.

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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 "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
    - The "Download-tab" will download the results to a .TXT file that can be opened in Notepad.
- "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 remind yourself of the Custom Report's general purpose and any instructions for updating it each 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.

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

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

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

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

    - The first drop-down box is a list of all fields as they appear on the form. Each field is listed in the following format: i) the form the field originates from is listed in capital letters.

      "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 identify the type of field. 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 either "Yes" or "No".

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- The second drop-down box is a comparator.

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

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

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

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

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

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

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

  "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 provided value.

  "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.

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"Like" returns results that match a given 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 certain pattern. This means that it will return records that are completely different from what is provided.

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

- 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 you aggregate totals for each category instead of plain numbers, such as the total within a specific category.

Let's do an example. Let's say that you are asked to review product records for the current year of data collection in preparation for completing the performance report.

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Follow these steps:

- In the "Title", you could call it "Products by Title, Author, Target Audience, and URL".
- I will keep the "Default" set to "Browse" because I prefer to view results in a web browser.
- For "Category", you could enter "Performance Report".
- For "Notes", leave a brief description on the purpose of the Custom Report.

  For example, say that this Custom Report is used to pull product records fields that are in the performance report.

- For "Selected fields", these are the fields from the online form. There are five (5) fields that I am interested in:
  1) Material type for each product record,
  2) Record Title,
  3) Author(s),
  4) Target Audience, and
  5) Contact URL.

  Optionally, you may also include additional fields if you are looking at specific material types, for example, the article DOI number, page, supplement, frequency of distribution, and so on.

  You know that all fields are listed in the Products Dataset, so you are looking for selected fields with "PRODUCT" listed in capital letters.

  You should scroll through the options to find the following fields listed on the left side and move them to the right side:
  - "PRODUCT Type of Material (S)",
  - "PRODUCT Title (T)",
  - "PRODUCT Author(s) (T)",
  - "PRODUCT Target Audience (L)",

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- "PRODUCT Contact URL (T)",

- For "Selection Criteria", you only need to view records for products entered in the current year of data collection and restrict records to only LEND or DBP, depending on if you are a LEND or DBP Program.

  Optionally, you may also choose to pull one product material type at a time.

  In total, there will be two (2) selection criteria.
  1. Select "PRODUCT Program Type (L)" in the first box, "like" in the second box, and select "LEND" in the third box. This will return all records with LEND or LEND + UCEDD selected.

     If working with DBP data, you can select DBP in the third box instead.

  2. Select "PRODUCT Fiscal Year (N)" in the first box, "equal to" in the second box, and then enter the desired year in the third box, for example, 2026, to return records entered between July 1, 2025 and June 30, 2026.

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

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

Now that you have created the report, you will see that a new category, "Performance Report," 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

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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 a previous version until you finalize your query.

All custom reports can be copied and pasted into an excel sheet. Run the report again. At the top of the page, ensure that all records are displayed in the "Show" box. Press CTRL + A to select all data, CTRL + C to copy it, and then open an Excel sheet. Paste the data using CTRL + V.

You now need to clean up the table format in Excel, so it is work-ready. Follow these steps:

- With the data selected, right-click and select "Remove Hyperlinks".
- Again, with the data selected, go to the Home tab, Styles, and select "Normal". That will remove formatting.
- Some of the field headers in rows two (2) and three (3) may be merged. In this case, you will see that with Title, Author(s), and Contact URL fields. Click on each of these, go to the Home tab, Alignment, and click "Merge & Center" to remove the merge.
- Now, copy and paste those fields you just unmerged into the third row.
- Delete rows one (1) and two (2), and the totals listed after the table. Now it is work-ready.

Now that you have a clean document, you can filter the responses. Click into the first row. In the Data tab, under Sort & Filter, click on the "Filter" option.

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If you want to view responses one product material type at a time, you can click on the drop-down under the field header to specify the filter parameters. For example, click on the arrow next to the header for “Peer-reviewed publications in scholarly journals Published/In Press”. A drop-down menu will appear. Uncheck the box for “Blanks”. You will now see only responses for that material type.

You can then review the spreadsheet. If any changes are needed, navigate to the Products Dataset in NIRS and complete the changes to the desired record.

You could follow the same steps for any of the fields, for example if you wanted to view the number of records with each target audience response category.

When creating Custom Reports, you may consider the following:

- Ask, "What do you want to capture in the Custom Report?"
- Break your question down into simple, actionable steps to guide your process.
- Begin with testing "selected fields" first.
    - Selected fields are the list of questions in the online form that you want to include in the report.
- Ask, "Which data points will help me verify the data I matched to?" These pieces of data may be helpful to include in "selected fields".
- Run the report after each revision to verify the responses in your query.
- Have the Dataset open in NIRS in a different browser (e.g., Chrome, Firefox, Microsoft Edge) to compare the form questions with the selected fields/selection criteria and ensure the options are accurate.
- Lastly, Custom Reports take practice.

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