

NLM OUTREACH APPLICATION AND ONLINE CONTRACT REPORTS SYSTEM

NN/LM Subcontractor Manual

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Table of Contents

NLM OUTREACH APPLICATION AND ONLINE CONTRACT REPORTS SYSTEM	1
Accessing the NLM Outreach Application and Online Contract Reports System	3
Assistance with the Portal and Applications	3
How to Report a Problem	3
Browsers	3
Computer Screen Resolution	4
Mobile Devices and Tablets	4
Registering to Use The Portal	4
Password and Username Recovery	8
Password Recovery	8
Username Recovery	10
Logging in to the Portal	11
Timing Out	11
Portal Icons	12
Roles	15
Actions	16
Group	17
Online Contract Reports (OCR) Application	19
The 3 Stages of a Report	19
Basic Menu	20
View Reports	21
Download and Print Online Contract Reports	22
Author Menu	23
Submit a Report	24
Edit a Report	24
Report Templates	28
NN/LM Interim/Quarterly Project Report Template	28

NN/LM Final Project Report Template	35
Activity Reports.....	45
Types of Activities to Enter	45
The 3 Stages of an Activity Report	45
Basic Menu	46
View Activities	47
Download and Print Activity Reports.....	47
Author Menu.....	48
Submit an Activity.....	49
Copy an Activity Report	58
Delete an Activity Report.....	59
Submit a Multi-Group Activity Report	60
Edit an Activity.....	62
Denied Activity Reports	64
Edit a Multi-Group Activity.....	64
Denied Multi-Group Activity Reports	66
Participant Information Form	66
Entering Participant Information Collected Manually	67
View Participant Information Entered Manually.....	69
Edit Participant Information Entered Manually	70
Requesting Participant Information Electronically.....	71
View Participant Information Submitted Electronically	74
Edit Participant Information Submitted Electronically.....	76
Combination: Entering Participant Information Collected Manually and Requesting Participant Information Electronically.....	76
View Combination.....	76
Edit Combination	77
Collecting Participant Information for Multiple-Session Activities.....	77
Activity Report and Participant Information Forms.....	78

Accessing the NLM Outreach Application and Online Contract Reports System

The URL for accessing the NLM Outreach Application and Online Contract Reports System, aka The Portal (<https://outreach.nlm.nih.gov>)

Assistance with the Portal and Applications

If you need assistance, please contact your RML Portal Administrator, 1.800.338.7657, Press 1.

How to Report a Problem

Please provide a screenshot when reporting a problem. This is *extremely* important because often, it is not possible for NLM Staff to replicate the reported problem. When NLM staff are unable to replicate a problem, it is often difficult to resolve, and may not be resolved until the problem is reported by another user, or a screenshot is provided.

In addition to providing a screenshot of the problem, include *at least* the following information when reporting problems with a particular report:

1. Username
2. Identify the application in which problem occurred:
 - a. Registration
 - b. Online Contract Reports
 - i. Identify the report type (RML, NTC, OERC, Web-STOC Quarterly or Annual, or NN/LM Project Interim/Quarterly or Final)
 - ii. Report ID #
 - c. Activity Reports
3. Operating System (OS), e.g. Windows 7, Mountain Lion
4. Web browser and version, e.g. Firefox 14.0.1, Internet Explorer 8.0
5. Error code produced by the application (if applicable)
6. Any other details that may be helpful in resolving the issue

Browsers

The NLM Outreach Application and Online Contract Reports System supports the following browsers:

- Firefox 3.6+, and
- Internet Explorer 7+

Browser versions can be identified under the Help tab of Firefox and Internet Explorer.

Computer Screen Resolution

The optimal computer screen resolution setting for the Portal is 1280x1024. The minimum acceptable screen resolution is 1152x864; Portal screens will not fully load if the screen resolution set lower than the minimum. On most computers, the screen resolution settings are located in the Control Panel.

Mobile Devices and Tablets

The NLM Outreach Application and Online Contract Reports System does not support tablets or mobile devices.

Registering to Use The Portal

Register to use the NLM Outreach Application and Online Contract Reports System (<https://outreach.nlm.nih.gov/>)

Select “Register” to begin the registration process.



Login into Outreach Applications
and
Online Contract Reports System

You need a user account to sign in.

User Name

Password

[Forgot Username or Password?](#)

[Register](#)

Login

Help

Outreach Applications and Online Contract Reports Registration Form

First Name:

Last Name:

User Name:

Password:

Passwords should be at least 8 characters long and contain one Capital letter and number.

Password Confirmation:

Email:

Security Question:

Security Answer:

Captcha Input: 

Access Selection: OCR Activity Reports
 OPD Web Exhibits

Group Selection:

[Login](#)

Complete the Portal Registration Form by entering the following information:

- **First Name**
- **Last Name**
- **Username** – select a username that is:
 - a minimum of 5 characters

- a maximum of 20 characters
- not currently in use

Note: *If a user is having difficulty registering, the Username chosen may already be in use in the Portal. Portal Administrators may suggest that a user try registering with a different Username. If registration problems persist, contact Renée Bougard or Preetham Nosum for assistance.*

- **Password** – select a password. Passwords must include:
 - a minimum of 8 characters
 - at least one uppercase letter
 - at least one number*Special characters are allowed.*
- **Password Confirmation** – re-enter the password
- **Email Address**
- **Security Question** – enter a question that you will be able to answer in the event you are not able to remember your password.
- **Security Answer** – answer to the Security Question
- **Captcha** – complete the Captcha

Note: *In some versions of Internet Explorer, the security question and/or Captcha may not appear on the registration form. This is usually accompanied by a notification bar that appears at the bottom of the browser screen. Users should select “Show All Content” to resolve the problem.*

- **Access Selection** – indicate applications you will need to access.

Note: *If you are unsure for which application to request access, contact your RML or Portal Administrator.*

- **Group Selection** – select your Region or Center
- Select **Register**

The User will see the following message at the top of the Registration screen, in green, indicating that registration is awaiting approval: **Your account has been registered, please wait for its approval by the RML/NLM Administrator.** Users will be notified of errors, in red, at the top of the Registration screen if there are errors.

Users will receive a system generated email when their registration has been approved. The email will be addressed from DO-NOT-REPLY@nlm.nih.gov with the Subject "Portal Account Approved."

Password and Username Recovery

Users who forget their password or username are able to recover these by selecting the "Forgot Username or Password?" link on the login page.

Login into Outreach Applications
and
Online Contract Reports System

You need a user account to sign in.

User Name

Password

[Forgot Username or Password?](#) [Register](#) [Login](#) [Help](#)

Password Recovery

The first option is assistance in recovering a password. Enter the Username and the email address associated with the account, and select "Next."

The user will be asked to submit the answer to the security question established by the user during registration.

Submitting the correct answer to security question will prompt the following message in green: **An email has been sent with a temporary password.** A system generated email will be sent to the user from “DO-NOT-REPLY@nlm.nih.gov” with the subject “Portal Application: Your temporary password.” The account password will be reset, and the email includes the temporary password to access the account.

Portal Application: Your temporary password
 DO-NOT-REPLY@nlm.nih.gov
 Sent: Wed 8/24/2011 3:48 PM
 To: user@library.org

Your password has been temporarily reset to 9unFOzGjOZ. Please log in here: <https://outreach.nlm.nih.gov> and immediately change your password under 'User Options' tab. If you require assistance, please contact Vishnu Nosum @ nosumv@nlm.nih.gov. DO NOT REPLY to this email.

Thank You

Users are encouraged to personalize their password after logging in to the Portal using the temporary password.

Username Recovery

The second option is assistance in recovering a username. Select **Forgot Username?**

Forgot Your Password?

To begin the recovery of your password, please enter your username and email address.

User Name:
Email Address:
[Forgot Username?](#) [Login](#) [Next](#) [Help](#)

The user will then be asked to enter the email address associated with the Portal account:

Forgot Your Username?

To recover your username, please enter your email address. An email will be sent to you with the username.

Email Address:
[Forgot Password?](#) [Login](#) [Submit](#) [Help](#)

The following message will be displayed in green: **An email has been sent with your username.** A system generated email will be sent to the user from “DO-NOT-REPLY@nlm.nih.gov” with the subject “Portal Application: Your Usernames” All usernames registered in the Portal with the email address submitted will be included in the email.

Portal Application: Your Usernames

DO-NOT-REPLY@nlm.nih.gov

Sent: Wed 8/24/2011 4:39 PM

To: Ima Newuser

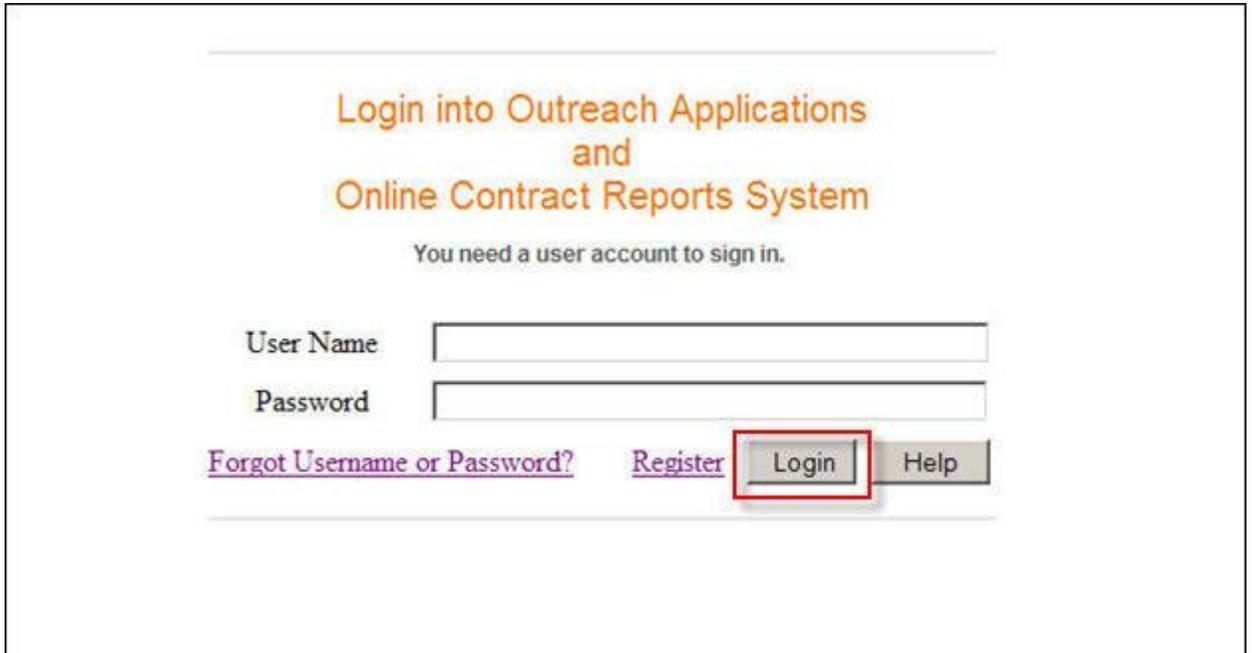
There are 2 usernames associated with this email address. The usernames are: imanewuser40, imanewuser45. To log in, click here: <https://outreach.nlm.nih.gov> If you require assistance, please contact Vishnu Nosum @ nosumv@nlm.nih.gov. DO NOT REPLY to this email.

Thank You

Logging in to the Portal

1. Access the NLM Outreach Application System and Online Contract Reports (<https://outreach.nlm.nih.gov/>)
2. Enter Username and Password
3. Select “Login”

If you need assistance, select “Help.”



Login into Outreach Applications
and
Online Contract Reports System

You need a user account to sign in.

User Name

Password

[Forgot Username or Password?](#) [Register](#)

The Portal screen is customized for each User. Users see only the application icons for which the User has been granted access.

Timing Out

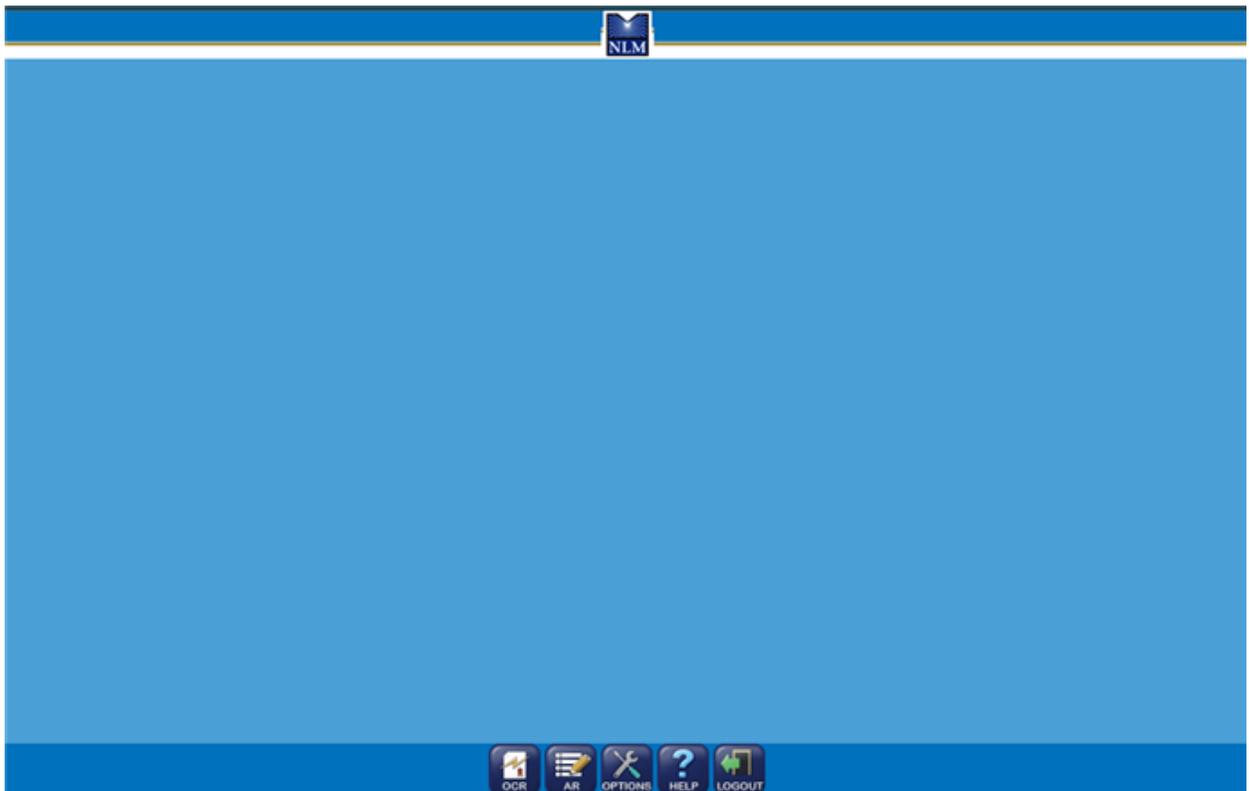
Users can be logged into the Portal, and inactive for 90 minutes before being timed out. At 90 minutes of inactivity, users will be logged out of the system, and data that was not saved will be lost.

After 85 minutes of inactivity, users will hear an alert with a pop-up box with a 5 minute warning to take action, or be logged off at the 90th minute:



If the user is inputting a report in the OCR, the most logical action is to select “Save.” If the user is not in a template, but wants to remain logged in to the Portal, the user should select a menu item, or select an item from a drop box. When a user performs an action (Save, selects a menu item, selects an item from a drop box), this restarts the 90 minute clock.

Users are encouraged to Save regularly, or after completing each section of a template. There are Save buttons conveniently located at the top and bottom of each template.



Portal Icons

Navigation icons are located at the bottom of the Portal screen. The icons correspond to applications Administrators and Users can access, provide an option for changing contact information and password, allow for administering the Portal, and a logout icon. When an icon is selected, it will be highlighted in burgundy. Navigation icons include:

- **OCR**

The Online Contract Reports (OCR) icon is selected to enter the reporting application. The OCR icon appears on Administrator screens, and User screens who have been granted access to the OCR.



- **AR**

The Activity Reports (AR) icon is selected to enter the activity reports application. The AR icon appears on Administrator screens, and User screens who have been granted access to the Activity Reports application.



- **OPTIONS**

The OPTIONS icon appears on all screens. Administrators and Users can change their contact information, including password, by selecting the OPTIONS icon. Administrators manage the Portal by selecting this icon.



The OPTIONS icon will direct both Administrators and Users to the User Options page. User information can be changed on this page.

The User Options page allows changes to be made to the following fields (refer to the following illustrations):

- First Name
- Last Name
- Email Address
- Security Question and Answer
- Password Change

- **HELP**

The HELP icon appears on all screens. It links to the *Subcontractor Manual*, Activity Reports application forms, and contact information for RMLs and Centers.



- **LOGOUT**

The LOGOUT icon appears on all screens, and is used to logout from the Portal.



User Options

Change User Information:

First Name:

Last Name:

Email:

Security Question:

Security Answer:

Change Password:

Current Password:

New Password:

Confirm New Password:



Roles

A User is assigned a Role for each application that is activated. Roles are defined by Actions the User can take. (Actions are defined in the following section).

Note: Roles assigned may vary across applications. ***Example:*** User A may have Approver Access in the OCR, Author Access in the AR, and Basic Access in the Exhibit application.

The 5 Roles that can be assigned to users of the Portal, including the Actions, are:

1. No Access
2. Basic Access – anyone who is provided basic access to an application
 - a. OCR

- i. View
 - ii. Download
 - b. AR
 - i. View
 - ii. Download
- 3. Author Access - RML & Center Staff, and Subcontractors
 - a. OCR
 - i. View
 - ii. Download
 - iii. Submit
 - iv. Edit
 - b. AR
 - i. View
 - ii. Download
 - iii. Submit reports for their Group and for Subcontractors
 - iv. Edit

Actions

This section describes the Actions that Roles can take in each application.

Note: *Actions may differ in scope, based on the Role assigned. Example: An Author (Subcontractor) will be able to View only reports for projects with which the Author is associated, while an Approver (Portal Administrator) will be able to View ALL RML and Center reports and reports for Subcontractors in the Approver's Region.*

- 1. Viewing
 - a. OCR
 - i. Subcontractors who have Basic or Author access may View reports submitted that are associated with their project
 - b. AR
 - i. Subcontractors who have Basic or Author access may View approved activities associated with their project
- 2. Downloading
 - a. OCR
 - i. Subcontractors who have Basic or Author access may Download only reports associated with their project
 - b. AR

- i. Subcontractors who have Basic or Author access may Download approved activities associated with their project
- 3. Submitting
 - a. OCR
 - i. Subcontractors who have Author Access may Submit a report for their Group
 - b. AR
 - i. Subcontractors who have Author Access may Submit an activity for their Group
- 4. Editing
 - a. OCR
 - i. Subcontractors who have Author Access may Edit a Report for the project with which they are associated.

Exception: After a Subcontractor submits a report to the RML or Center, the Subcontractor may no longer edit the report. Only RML and Center Staff who have Approver Access may edit the report.

- b. AR
 - i. Subcontractors who have Author Access may Edit an activity for the project with which they are associated

Exception: After a Subcontractor submits an activity to the RML or Center, the Subcontractor may no longer edit the activity. Only RML and Center Staff who have Approver Access may edit the activity.

Group

When a user registers in the Portal, the user makes a Group Selection (Region or Center). Region or Center can be viewed as the *first level* Group with which a user is identified. There is also a *sub* Group with which a user is identified.

- 1. OCR
 - a. Subcontractors - When a Portal Administrator provides a Subcontractor with access to the OCR, the Portal Administrator must associate the Subcontractor with a project on the Administrator Options page. Project can be viewed as a

sub Group with which the Subcontractor is identified. More than one Subcontractor may be associated with a project.

Subcontractors who have Author Access and are associated with a project can submit and edit project reports for their Group, as long as the reports have an incomplete status (are being saved in the OCR and have not been submitted to the RML or Center). In this case, a Subcontractor's Group would be all reports for a Project with which the Subcontractor is associated.

2. AR

- a. Subcontractors - More than one Subcontractor may be associated with a project. Subcontractors who have Author Access and are associated with a project can submit and edit activities for their Group, as long as the activities have an incomplete status (are being saved in the AR and have not been submitted to the RML or Center). In this case, a Subcontractor's Group would be all activities for a Project with which the Subcontractor is associated.

Online Contract Reports (OCR) Application

The Online Contract Reports (OCR) is the application RMLs, Centers, and Subcontractors use to submit Contract and project reports. Access the OCR by logging in to the Portal and selecting the OCR icon, as illustrated below:



A user's assigned Role in the OCR determines which Main Menu items appear on the screen. (Refer to the Roles section of the *Manual*).

***Note:** It is not possible to attach items to RML, Center, or Project reports. NLM no longer requires attachments (photos, copies of promotional items, workbooks, etc.) as part of Contract and Subcontractor reporting. The RML may, however, request that its Subcontractors submit this type of information, and these attachments will remain with the RML. Do not send attachments to NLM.*

The 3 Stages of a Report

Reports will be in one of the following stages at any given time:

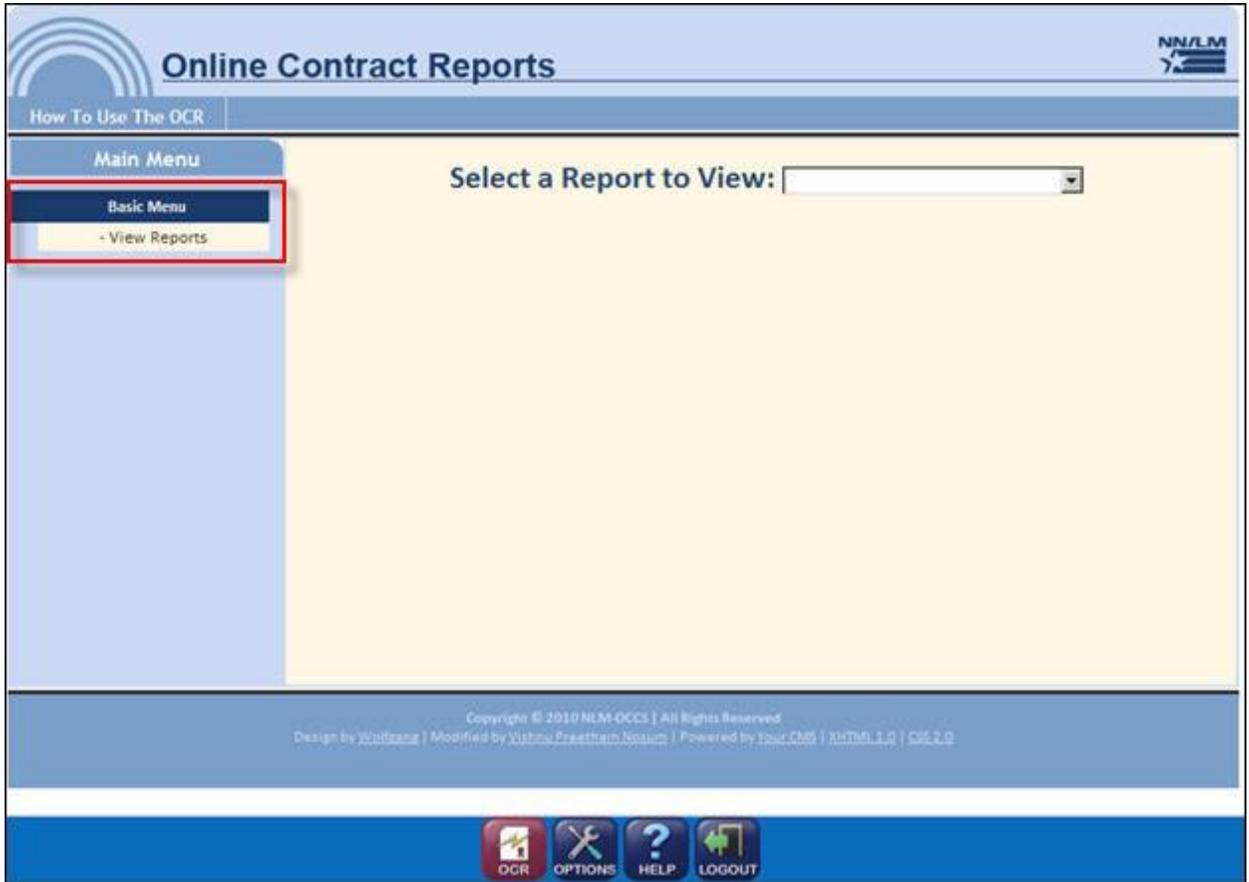
- **Incomplete** - a report that is:
 - in progress
 - saved in the OCR, and has not been "Submitted to the RML or Center or NLM" to be reviewed
 - "Denied" by the RML or Center

Authors and Approvers may access under **Edit a Report**. (Refer to **Edit a Report** section of the *Manual*).

- **Submitted** – a report that an Author has submitted to the RML or Center for review. A submitted report:
 - cannot be edited by the Author
 - can only be edited by RML and Center Approvers.
- **Approved** – a report that:
 - has been reviewed and **Approved** by an RML or Center Approver
 - is ready to be submitted to NLM as part of the RML or Center report

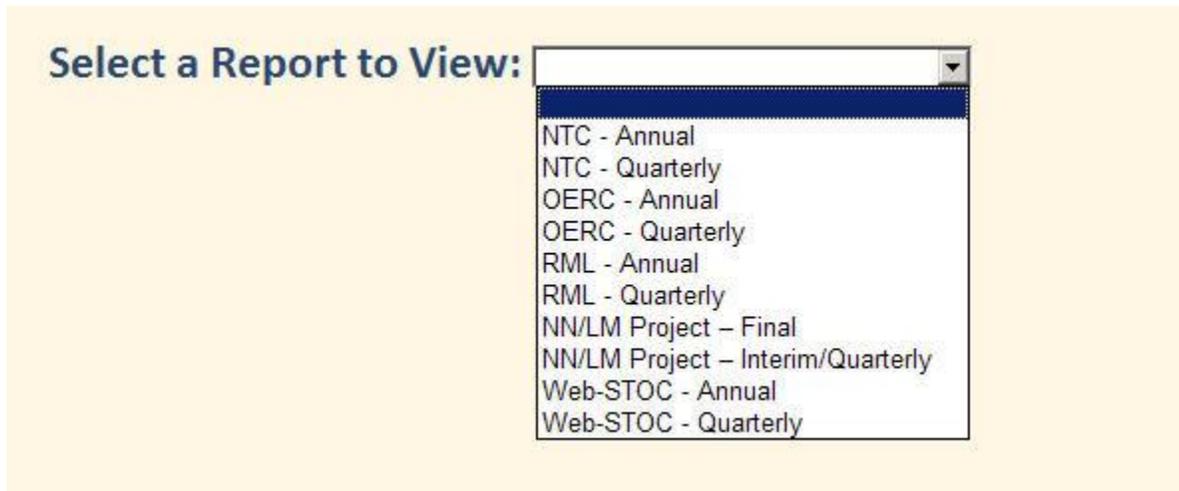
o is accessed under **View a Report**

Basic Menu



Users who are assigned **Basic Access** in the OCR see only the **Basic Menu**. The **Basic Menu** allows the user to **View** and **Download** reports.

View Reports



When a user selects **View Reports**, a list of reports the user may access (based upon the user’s Access level in the OCR) will list. Reports that appear under **View Reports** have been approved by an RML or Center. Subcontractors who have Basic or Author access may **View** only reports that are associated with their project

The following information will display when NN/LM Project reports are selected for viewing:

NN/LM Project – Interim/Quarterly Reports						
	ID	REPORTING PERIOD START DATE	REPORTING PERIOD END DATE	PROJECT TITLE	ORGANIZATION NAME	REGION
View	75	11/1/2011 12:00:00 AM	1/31/2012 12:00:00 AM	ARCH - Access to Resources for Community Health	MGH - Treadwell Library; Community Health Associates	NEW ENGLAND
View	213	10/1/2011 12:00:00 AM	3/31/2012 12:00:00 AM	CareLink Patient Education Initiative: Using MedlinePlus Videos to Reach the Underserved	University Health System	SOUTH CENTRAL
View	88	11/1/2011 12:00:00 AM	1/31/2012 12:00:00 AM	COA 2011-2012: Arizona Outreach	University of Arizona, Tucson, Arizona Health Sciences Library (Arizona Health Sciences Library)	PACIFIC SOUTHWEST

- **View** – select to view the report
- **ID** – a tracking number specific to the OCR

- **Reporting Period Start Date** – start date of the report
- **Reporting Period End Date** - end date of the report
- **Project Title** – title of the project
- **Organization Name** – name of the organization awarded the project
- **Region** – name of the Region where the Organization is located

All columns with headers can be sorted by clicking on the column header.

Download and Print Online Contract Reports

When a user selects **View Reports**, a list of reports the user may access (based upon the user's access level in the OCR) will list. Reports that appear under View Reports have been approved by an RML or Center. Subcontractors who have Basic or Author access may **Download** only reports associated with their project

A report can be downloaded (saved) and printed in Portable Document Format (PDF) after it has been **Approved** by the RML. To download or print a report:

1. Select **View Reports** under the Basic Menu
2. Select the type of report to save or print
3. Select **View** next to report to save or print
4. Select **Generate PDF** in the upper right corner of the report

The report will then open as a PDF in a separate window. The report can then be saved or printed.

Author Menu



Users who are assigned **Author Access** in the OCR see the **Author Menu**, in addition to the Basic Menu.

The **Author Menu** allows the user to **Submit a Report** and **Edit a Report**.

Submit a Report

Choose a Report Template

RML Quarterly Report	RML Annual Report
NTC Quarterly Report	NTC Annual Report
OERC Quarterly Report	OERC Annual Report
Web-STOC Quarterly Report	Web-STOC Annual Report
NN/LM Interim/Quarterly Project Report	NN/LM Final Project Report

Users who are assigned **Author Access** (or a higher level of access) in the OCR may **Submit a Report**. Templates that appear on an Author’s screen are based upon the Author’s Group Selection (Region or Center) when registering for the Portal, and if the Author is a Subcontractor. Subcontractors who have Author Access may **Submit a Report** for their Group

Each report template is discussed in a following section of the *Manual*.

Edit a Report

Select a Report to Edit:

▼

- NTC - Annual
- NTC - Quarterly
- OERC - Annual
- OERC - Quarterly
- RML - Annual
- RML - Quarterly
- Subcontractor - Final
- Subcontractor - Quarterly
- Web-STOC - Annual
- Web-STOC - Quarterly

Users who are assigned **Author Access** in the OCR may **Edit a Report**, as long as the report is incomplete. (Only incomplete reports that have not yet been submitted to the Approver appear under **Edit a Report**). An incomplete report is one that is in progress, is being saved, and has not been submitted to the RML or Center Approver or NLM. After a report is approved,

the RML or Center Approver then sends the RML or Center Quarterly or Annual Report to NLM as a final step.

Subcontractors who have Author Access may **Edit a Report** for the project with which they are associated

***Exception:** After a Subcontractor submits a report to the RML or Center, the Subcontractor may no longer edit the report. Only RML and Center Staff who have Approver Access and Portal Administrators may edit the report.*

When a user selects a report type to **Edit**, the reports selected will list. The following information will display when NN/LM Project reports are selected for editing:

NN/LM Project – Interim/Quarterly Reports				
	ID	REPORTING PERIOD COVERED START DATE	REPORTING PERIOD COVERED END DATE	PROJECT TITLE
Edit	26	9/15/2011 12:00:00 AM	11/15/2011 12:00:00 AM	Express Outreach Project - Bread for the City - BFC's Health Information Project
Edit	54	12/31/2999 12:00:00 AM	12/31/2999 12:00:00 AM	Express Outreach Project Award-Salisbury University-Health Info @ Point of Need for Eastern Shor
Edit	63	1/12/2011 12:00:00 AM	4/30/2012 12:00:00 AM	Consumer Health Outreach to Older Adults: Health Literacy Training
Edit	87	11/1/2011 12:00:00 AM	1/31/2012 12:00:00 AM	Express Outreach Follow-up Award - University of Miami
Edit	98	9/14/2011 12:00:00 AM	1/31/2012 12:00:00 AM	Express Library Technology Improvement - Southeastern Regional Medical Center
Edit	100	12/31/2999 12:00:00 AM	12/31/2999 12:00:00 AM	Yr1 DiPA - Preserving the History of Medicine In Arkansas
Edit	151	11/1/2011 12:00:00 AM	1/31/2012 12:00:00 AM	MAP Yr 1 Disseminate ICANFIT: A mobile application to promote physical activity and access to health

- **Edit** – select a report to edit
- **ID** – a tracking number specific to the OCR
- **Reporting Period Start Date** – start date of the report
- **Reporting Period End Date** - end date of the report
- **Project Title** – title of the project

All columns with headers can be sorted by clicking on the column header.

The Author then edits the report and saves the report, as needed, until the report is complete and ready to be submitted to the RML or Center Approver by selecting “Submit to RML” (for RMLs and Subcontractors) or “Submit to Center” (for Centers). When a report is successfully saved, the Author will see a message in green at the top of the template indicating: **Your report has been saved.**

***Note:** If an Author selects “Submit to RML” or “Submit to Center” before selecting “Save,” the edits will be saved in the system before the report is submitted.*

When an Author successfully submits a report to the RML or Center Approver, the Author is taken out of the template and back to the “View Reports” screen, where the Author will receive a confirmation message in green, at the top of the screen: **Your report has been submitted to your Group Administrator.**

Errors are indicated in red at the top of the template and also with an asterisk * at the end of the field where the error occurs.

The RML or Center Approvers will receive a Portal generated email indicating that a new report has been submitted for review.

When an Approver **Denies** a report, the Approver must include comments explaining why a report was denied in the “Comments on Report Denied Approval.” Denied reports are considered incomplete and are accessed in **Edit a Report**.

NN/LM Project Report Denied

DO-NOT-REPLY@nlm.nih.gov

Sent: Fri 10/14/2011 1:49 PM

To:  Bougard, Renee (NIH/NLM) [E]

A report submitted by you has been denied. Reason: The problems and barriers are incorrect. Please revise and resubmit this report. Thanks!

To log in and make corrections, click here: <https://outreach.nlm.nih.gov> If you require assistance, please contact your RML Portal Administrator at 1.800.338.7657, Press 1. DO NOT REPLY to this email.

Thank you.

The Author will then select **Edit a Report**, edit, and resubmit the report to the RML or Center for review.

When an NN/LM Project report is approved after an RML or Center submits its Quarterly report to NLM, the NN/LM Project report will autolist in the respective Quarterly report, based upon the End Date of the Reporting Period Covered.

Report Templates

NN/LM Interim/Quarterly Project Report Template

Note: Tabular data cannot be entered into text boxes.

NN/LM Interim/Quarterly Project Report

Award Type: *

Region/Center: *

Contract Number: *

Project Title: *

Name of Organization: *

Mailing Address: *

Name of the Person Submitting Report: *

Email: *

Voice Number: *

Fax Number: *

Reporting Period Covered: *

Project Date: *

Extended Project End Date (if applicable): *

Date Submitted: *

Special Funding Initiative: *

Subcontractor ≥ \$20,001 Project

MIDDLE ATLANTIC

SOUTHEASTERN ATLANTIC

GREATER MIDWEST

MIDCONTINENTAL

SOUTH CENTRAL

PACIFIC NORTHWEST

PACIFIC SOUTHWEST

NEW ENGLAND

NLM Training Center

Outreach Evaluation Resource Center

Web-STOC

City: *

State: *

Zip Code: *

Start - End (DD-MON-YYYY)

Start - End (DD-MON-YYYY)

DD-MON-YYYY

DD-MON-YYYY

Yes

Required fields are noted with an asterisk (*). These fields must be completed before the report is submitted to the RML.

- **Award Type:** If the report is for a project that is funded at \$20,001 or greater, check the box.
- ***Region or Center:** Select Region or Center from the drop box

- **Contract Number:** The Contract Number for the Region where the Author is located will automatically populate, based upon the user's Group Selection (Region) during Portal registration.
- ***Project Title:** The Project Title will automatically populate with the title entered by the Portal Administrator in the "Associated Project" field, on the Administrative Options page when processing a Subcontractor's registration request.

***Note:** When NN/LM Staff enters an Interim/Quarterly Project Report on behalf of a Subcontractor this will appear as a text field. It is extremely important that NN/LM Staff enter the Project Title exactly as the Portal Administrator entered the title in the Associated Project field when processing the Subcontractor's registration. If the Project Title is not entered exactly as it appears in the Associated Project field, the report will not be visible in the OCR.*

- ***Name of Organization:** Enter the exact Organization name as it appears in the Subcontract or Memorandum of Agreement/Understanding (MOA/MOU)
- ***Mailing Address:** Enter the subcontractor's mailing address.

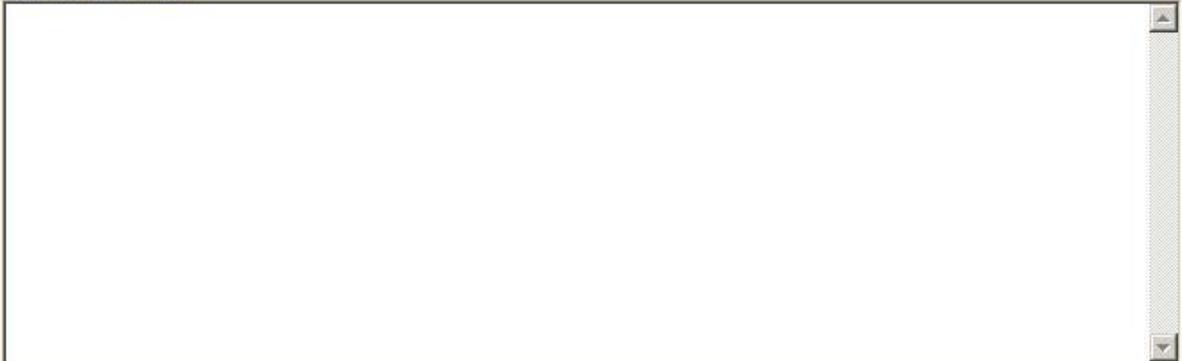
***Note:** State – use US Postal Service (USPS) 2 letter state abbreviation. Zip Code is required; +4 is optional.*

- ***Name of the Person Submitting the Report:** Enter the Author's personal name
- ***Email:** Enter the Author's email address
- ***Voice Number:** Enter the Author's phone number. Voice number is required.
- **Fax Number:** Enter the Author's fax number. Fax number is optional.
- ***Reporting Period Covered:** Your RML will establish reporting periods for the project. Enter the **Start Date** and the **End Date** covered in this report. Format = DD-MON-YYYY, e.g. 08-Apr-2011. The month may be entered in either upper or lowercase.

- ***Project Date:** Enter the **Start Date** and **End Date** of the project, as it appears in the subcontract/Memorandum of Agreement/Memorandum of Understanding. Format = DD-MON-YYYY, e.g. 08-Apr-2011. The month may be entered in either upper or lowercase.
- **Extended Project End Date (if applicable):** If the RML has formally extended the **End Date** of the project, enter the new **End Date** of the project. Format = DD-MON-YYYY, e.g. 08-Apr-2011. The month may be entered in either upper or lowercase.
- ***Date Submitted:** Enter the date the report is submitted to the RML. Do not enter the date the report was initially started, revision dates, etc. Format = DD-MON-YYYY, e.g. 08-Apr-2011. The month may be entered in either upper or lowercase.
- **Special Funding Initiative:** Contact your RML to determine if the project is a Special Funding Initiative.

Project Summary

Please provide a brief, one-paragraph narrative summarizing major accomplishments made during the reporting period.



Description of Progress Toward the Project's Major Objectives

Describe the specific steps or activities used in the following areas: Administrative/Planning Activities, Collaborations/Partnerships, and Web Site Development Activities.

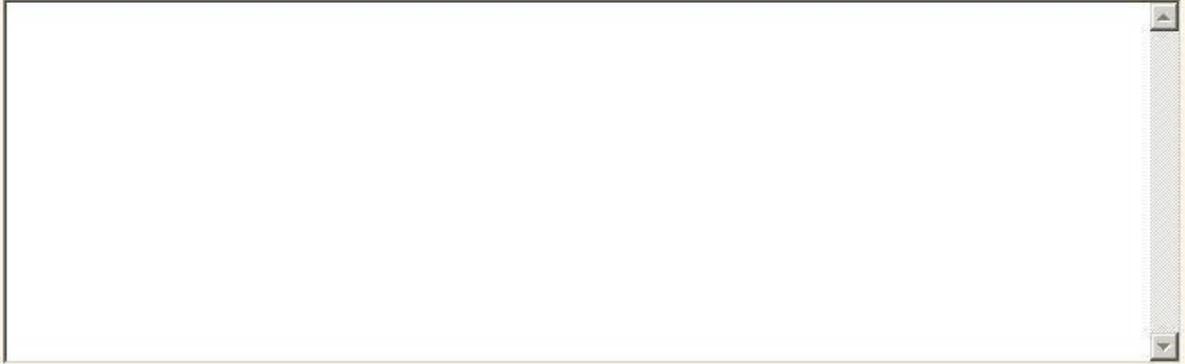


Note: The following sections of NN/LM Interim/Quarterly Project report template must have text in the fields before the report can be submitted: *Project Summary, Description of Progress Toward the Project's Major Objectives, Evaluation, and Other*. If no activity occurred during the reporting period, the Author should indicate this by entering *Not Applicable, or N/A*

- ***Project Summary:** Enter a summary of major accomplishments during the reporting period.
- ***Description of Progress Toward the Project's Major Objectives:** Enter information on Administrative/Planning Activities, Collaborations/Partnerships, and Web Site Development Activities.

Evaluation

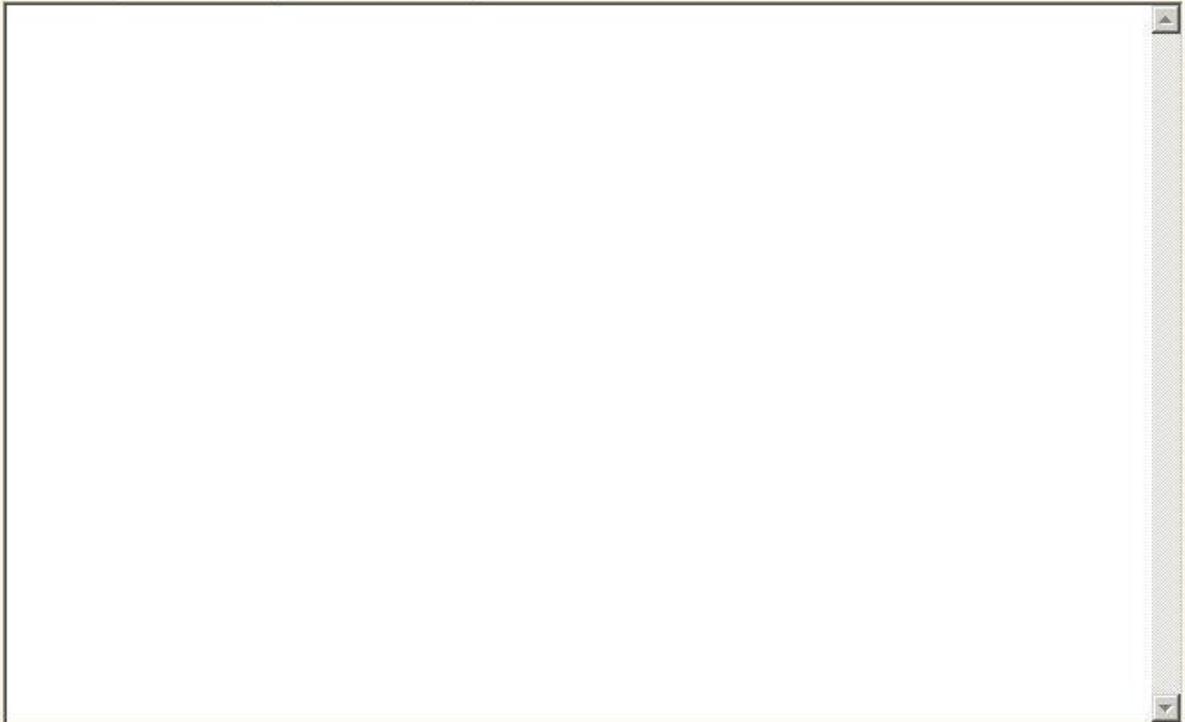
How is the project being evaluated? What results are being achieved based on the objectives of the project?



- ***Evaluation:** Explain how the project is being evaluated and indicate achievements toward objectives during the reporting period.

Other

Contact your RML or Center for additional reporting requirements for this field. If available, include URLs for press releases, advertisements, and newsletter articles.



- ***Other:** Contact your RML (1.800.338.7657, Press 1) for instructions on additional reporting requirements for this area of the report. In addition, if available, include URLs for press releases, advertisements, and newsletter articles.

Attachment 1
Activity Reporting Form (AR) summary data: Subcontractor activities

Attachment 2
Exhibit summary data: Subcontractor exhibits and health fairs

Save
Submit to RML

- **Attachment 1:**

Note: Until the Activity Reports (AR) application is linked to the Portal, disregard this attachment. When the Activity Reports (AR) application is linked to the Portal, this attachment will automatically populate with Subcontractor activities from the AR, for this reporting period. RMLs will be required to edit Subcontractor reports to populate this attachment.

- **Attachment 2:**

Note: Until the Exhibits application is linked to the Portal, disregard this attachment. When the Exhibits application is linked to the Portal, this attachment will automatically populate with Subcontractor exhibits and health fairs. RMLs will be required to edit Subcontractor reports to populate this attachment.

- **Save:** There are two “Save” buttons, located in the upper left and lower left of the template. “Save” allows the Author to save a report that is in progress, and to edit the report as needed. As long as a report is being saved, it is considered incomplete. “Save” does not send the report to the RML Approver.
- **Deny:** This function is available only to Approvers. It is located in the lower right of the report. An Approver may “Deny” a report that has been submitted to the RML. Denied reports are considered incomplete. The Author will receive an email indicating the report has been denied, and will have an opportunity to revise and resubmit the report to the RML Approver.

- **Submit to RML:** Select “Submit to RML” to submit the report for review.

Note: Approvers have a “Submit to NLM” button instead of “Submit to RML.”

NN/LM Final Project Report Template

Note: Tabular data cannot be entered into text boxes.

NN/LM Final Project Report

Award Type: *

Region/Center: *

Contract Number: *

Project Title: *

Name of Organization: *

Mailing Address: *

Subcontractor ≥ \$20,001 Project

▼

MIDDLE ATLANTIC

SOUTHEASTERN ATLANTIC

GREATER MIDWEST

MIDCONTINENTAL

SOUTH CENTRAL

PACIFIC NORTHWEST

PACIFIC SOUTHWEST

NEW ENGLAND

NLM Training Center

Outreach Evaluation Resource Center

Web-STOC

City:

State:

Zip Code: -

Name of the Person Submitting Report:

Email:

Voice Number: - -

Fax Number: - -

Reporting Period Covered: Start - End (DD-MON-YYYY)

Project Date: Start - End (DD-MON-YYYY)

Extended Project End Date (if applicable): DD-MON-YYYY

Date Submitted: DD-MON-YYYY

Special Funding Initiative: Yes

Minority Populations Served:

African Americans

American Indians/Alaska Natives

Asian Americans

Hispanics/Latinos

Native Hawaiians and Pacific Islanders

Other; please specify:

Required fields are noted with an asterisk (*). These fields must be completed before the report is submitted to the RML.

- **Award Type:** If the report is for a project that is funded at \$20,001 or greater, check the box.
- ***Region:** Select Region from the drop box.
- **Contract Number:** The Contract Number for the Region where the Author is located will automatically populate, based upon the user's Group Selection (Region) during Portal registration.
- ***Project Title:** The Project Title will automatically populate with the title entered by the Portal Administrator in the "Associated Project" field, on the Administrative Options page when processing a Subcontractor's registration request.

***Note:** When NN/LM Staff enters an Interim/Quarterly Project Report on behalf of a Subcontractor this will appear as a text field. It is extremely important that NN/LM Staff enter the Project Title exactly as the Portal Administrator entered the title in the Associated Project field when processing the Subcontractor's registration. If the Project Title is not entered exactly as it appears in the Associated Project field, the report will not be visible in the OCR.*

- ***Name of Organization:** Enter the exact Organization name as it appears in the Subcontract or Memorandum of Agreement/Understanding (MOA/MOU).
- ***Mailing Address:** Enter the subcontractor's mailing address.

***Note:** State – use US Postal Service (USPS) 2 letter state abbreviation. Zip Code is required; +4 is optional.*

- ***Name of the Person Submitting the Report:** Enter the Author's personal name.
- ***Email:** Enter the Author's email address.
- ***Voice Number:** Enter the Author's phone number. Voice number is required.
- **Fax Number:** Enter the Author's fax number. Fax number is optional.

- ***Period Covered:** Select the RML Contract Year in which the project was funded. Contact your RML for further instructions on completing this field.
- ***Project Start Date:** Enter the start date of the project as it appears in the subcontract/Memorandum of Agreement/Memorandum of Understanding.
- ***Project End Date:** Enter the end date of the project as it appears in the subcontract/Memorandum of Agreement/Memorandum of Understanding.
- ***Date Submitted:** Enter the date the report is submitted to the RML. Do not enter the date the report was initially started, revision dates, etc. Format = DD-MON-YYYY, e.g. 08-Apr-2011. The month may be entered in either upper or lowercase.
- **Special Funding Initiative:** Contact your RML to determine if the project is a Special Funding Initiative.
- **Minority Populations Present:** If applicable, indicate which minority populations were targeted in the project. There is a 24 character limit for this field.

Project Overview

The NN/LM will make these summaries available to the public via the NN/LM web site. The project overview should provide a concise summary of your project that can be shared publicly. Your summary should provide a brief description that presents the most important information about your project to those who do not have access to your full report.

Guiding questions:

1. What were your primary goals for this project?
2. What was the target population and why did you choose it?
3. What organizations and partners were also involved in implementing the program?
4. What were the project's major accomplishments? How did it make a difference?
5. If you have an article that is or will be published about this project, please include URLs or reference information.



- ***Project Overview:** Enter a brief overview, or an executive summary, for the project. As noted, the Project Overview will be available on a public website. Consider that readers will not have access to your full report when developing this overview. Use the guiding questions to assist you in developing the Project Overview: What were your primary goals for this project? What was the target population and why did you choose it? What organizations and partners were also involved in implementing the program? What were the project's major accomplishments? How did the project make a difference? If available, include a URL or reference information if an article or paper will be published about the project.

Approaches and Interventions Used

Describe the specific steps or activities used in the following areas: identifying and scheduling sessions; promotion/marketing; training; personnel/staffing; equipment/telecommunications; web site development.

Guiding questions:

1. List your goals and objectives for this project.
2. What were the steps and activities you used to accomplish your goals and objectives?
3. How did each team member contribute to the project?
4. Please list URLs to project resource material that is publicly available (e.g., abstracts, posters, promotional material, slide presentations.) URLs for all web-based training materials should also be submitted to the MLA Educational Clearinghouse (<http://cech.mlanet.org/>)



- ***Approaches and Interventions Used:** Describe steps or activities used in: identifying and scheduling sessions; promotion/marketing; training; personnel/staffing; equipment/telecommunications; web site development. Use the guiding questions to assist in developing this section: List the project goals and objectives; discuss the steps and activities used to accomplish the goals and objectives; and explain how each team member contributed to the project. Provide the URLs for abstracts, posters, promotional material, and slide presentations that are available on the Internet. All web-based training materials developed as part of this project should be submitted to the MLA Educational Clearinghouse. (Please consult with RML or Center Staff if assistance is required).

Problems or Barriers Encountered

The NN/LM will make this section available to the public via the NN/LM web site. List any major problems or barriers you encountered when pursuing your objectives, including (but not limited to) the areas of promotion/marketing; scheduling; training; equipment/telecommunications; personnel/staffing; unanticipated budgetary issues; web site and resource development; exhibiting; translations; and partnerships.



- ***Problems or Barriers Encountered:** List any major problems or barriers you encountered when pursuing your objectives, including (but not limited to) the areas of promotion/marketing; scheduling; training; equipment/telecommunications; personnel/staffing; unanticipated budgetary issues; web site and resource development; exhibiting; translations; and partnerships. As noted, Problems or Barriers Encountered will be available on a public website. Consider that readers will not have access to your full report when developing your response to this section.

Evaluation

How was the project evaluated? What results were achieved based on the objectives of the project?

Guiding questions:

1. What methods did you use to assess whether or not you met your goals and objectives?
2. Were your original project goals and objectives met?
3. What goals and objectives were not accomplished and why?



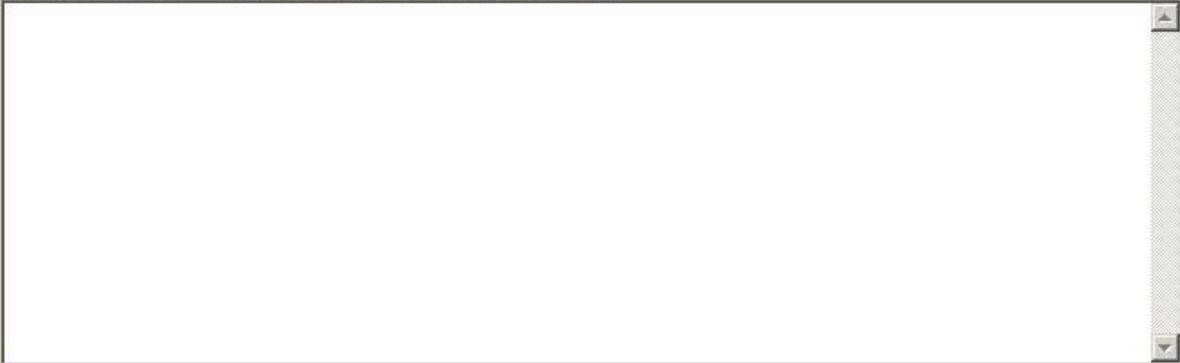
- ***Evaluation:** Explain how the project was evaluated and what results were achieved based on the objectives of the project. Use the guiding questions to assist in developing your response: what methods did you use to assess whether or not you met your goals and objectives; were your original project goals and objectives met; and what goals and objectives were not accomplished and why.

Continuation Plans

What parts of this project will continue and how?

Guiding questions

1. What activities will be continued and which partners will participate in the continuation?
2. If there are plans to expand or replicate this project, explain how this will be done. Who will provide the funding and staffing to continue project activities?



- ***Continuation Plans:** Indicate which parts of the project will continue and how, using the guiding questions: What activities will be continued and which partners will participate in the continuation; If there are plans to expand or replicate this project, explain how this will be done; and who will provide the funding and staffing to continue project activities?

Lessons Learned

The NN/LM will make this section available to the public via the NN/LM web site. If answers to these questions are contained elsewhere in your report, repeat them here.

Guiding questions

1. What unexpected results (positive or negative) did you have with the program?
2. What recommendations would you have for someone who wanted to apply your program in their region?
 - What significant lessons were learned which would be of interest or use to others conducting outreach projects?
 - Which strategies were the most effective in implementing the project?
 - Which of your strategies would you not use again and why?
 - If you offer this program in the future, what will you do differently?



- ***Lessons Learned:** Use the guiding questions to assist you in developing the Lessons Learned during your project: what unexpected results (positive or negative) did you have with the program; what recommendations would you have for someone who wanted to apply your program to their region; what significant lessons were learned which would be of interest or use to others conducting outreach projects; which strategies were the most effective in implementing the project; which of your strategies would you not use again and why; and if you offer this program in the future, what will you do differently. As noted, this section of your report will be available on a public website. Consider that readers will not have access to your full report when developing your response to this section.

Impact

The NN/LM will make this section available to the public via the NN/LM web site. Why do you think this project was important?

Guiding questions

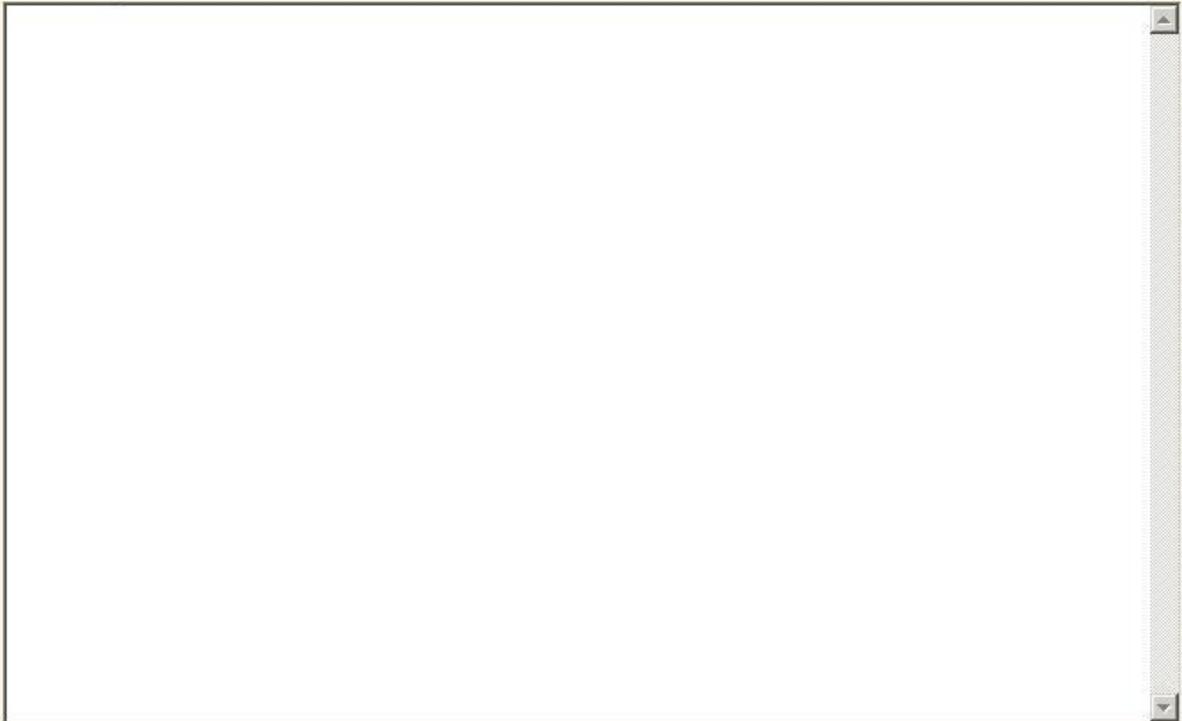
1. What was the impact of your project? For example, did the project:
 - Help a low-resource organization serve a high risk population?
 - Contribute toward the ability of your organization's or your partner organization's ability to meet its mission, values and priorities?
 - Benefit any of the partner organizations, e.g. raising visibility; increasing utilization)?
2. Please tell a "success story" that gives an example of your project's impact.
3. How do you plan to share your project and lessons learned with colleagues, such as through a conference presentation or publication?



- ***Impact:** Explain why you think this project is important. Use the guiding questions to assist you in developing your response: What was the impact of your project; how will you share your project and lessons learned with colleagues. Also, please include a success story as an example of the impact of your project. As noted, this section of your report will be available on a public website. Consider that readers will not have access to your full report when developing your response to this section.

Other

Contact your RML or Center for additional reporting requirements for this field. If available, include URLs for press releases, advertisements, and newsletter articles.



Attachment 1

Activity Reporting Form (AR) summary data: Subcontractor activities

Attachment 2

Exhibit summary data: Subcontractor exhibits and health fairs

Save

Submit to RML

- ***Other:** Contact your RML (1.800.338.7657, Press 1) for instructions on additional reporting requirements for this area of the report. In addition, if available, include URLs for press releases, advertisements, and newsletter articles.

- **Attachment 1:**

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- **Deny:** This function is available only to Approvers. It is located in the lower right of the report. An Approver may “Deny” a report that has been submitted to the RML. Denied reports are considered incomplete. The Author will receive an email indicating the report has been denied, and will have an opportunity to revise and resubmit the report to the RML Approver.
- **Submit to RML:** Select “Submit to RML” to submit the report for review.

Activity Reports

The Activity Reports (AR) application is used by RMLs, Centers, and Subcontractors to submit reports on activities conducted as part of a Contract, or a project funded by an RML or Center. Access the Activity Reports application by logging in to the Portal and selecting the AR icon, as illustrated below:



A user's assigned Role in the Activity Reports application determines which Main Menu items appear on the screen. (Refer to the "Roles" chapter of the *Manual*).

Types of Activities to Enter

Reports on the following activities performed under an NN/LM Contract or funded project should be submitted to the Activity Reports application:

- **Training** activities
- **Presentations** made at national, regional, state, and local events or conferences
- **Site Visits**

***Note:** Contracts and projects must have an entry in the Outreach Projects Database before activities can be submitted in the Activity Reports application.*

The 3 Stages of an Activity Report

Activity reports will be in one of the following stages at any given time:

- **Incomplete** – an activity report that is:
 - in progress
 - saved in the AR application, and has not been "Submitted to the RML or Center" to be reviewed
 - "Denied" by the RML or Center

Authors and Approvers may access incomplete Activity Reports under **Edit an Activity** or **Edit a Multi-Group Activity**. (Refer to the following sections of the *Manual*: Activity Reports, Author Menu, Edit an Activity, Edit a Multi-group Activity).

- **Submitted** – an activity report that an Author has submitted to the RML or Center for review. A **submitted** activity report:
 - cannot be edited by the Author
 - can only be edited by RML and Center Approvers. Approvers may access the report under **Edit Group Activities** or **Edit Multi-Group Activities**. (Refer to the following sections of the *Manual*: Activity Reports, Approver Menu, Edit Group Activities, Edit Multi-Group Activities)

- **Approved** – an Activity Report that:
 - has been reviewed and **Approved** by an RML or Center Approver
 - can auto-attach to the RML or Center’s Quarterly Report, and/or Subcontractor’s Interim/Quarterly or Final report
 - is accessed under **View Activities**

Basic Menu

The screenshot shows the 'Activity Reports' interface. At the top, there is a header with 'Activity Reports' and the NN/LM logo. Below the header, there is a navigation menu with 'How to use AR' and a 'BASIC' section containing 'View Activities'. The main content area is titled 'Activities' and contains a table with the following data:

ID	PROJECT TITLE	ORGANIZATION NAME	MULTI-SESSIONS
View 354	Salud! Upgrading and Expanding the Spanish Language Content in HealthyNJ (3)	University of Medicine and Dentistry of New Jersey	N
View 355	Outreach Library 2011-2016: The University of Iowa Library of the Health Sc	University of Iowa	N
View 366	Outreach Library 2011-2016: The University of Iowa Library of the Health Sc	University of Iowa	Y
View 373	Greater Midwest Region 2011-2016 (5003)	University of Illinois, Chicago	Y
View 374	Outreach Library 2011-2016: The University of Iowa Library of the Health Sc	University of Iowa	Y
View 375	Electronic Document Delivery Award - Vassar Brothers Medical Center (2681)	Vassar Brothers Medical Center	N
View 376	HIO Subcontract: Extending Statewide Outreach Services to Advanced Register	University of Kentucky	Y
View 395	Outreach Library 2011-2016: The University of Iowa Library of the Health Sc	University of Iowa	Y

At the bottom of the interface, there is a blue bar with four icons: 'AR' (Activity Reports), 'OPTIONS', 'HELP', and 'LOGOUT'.

Users who are assigned **Basic Access** in Activity Reports see only the **Basic Menu**. The **Basic Menu** allows the user to **View** and **Download** activity reports.

View Activities

When a user selects **View Activities**, a list of activity reports that have been approved by an RML or Center will list. Subcontractors who have Basic or Author access may **View** approved activities associated with their project.

The following information will display when activity reports are selected for viewing:

- **View** – select to view the report
- **ID** – a tracking number specific to the AR
- **Project Title** – title of the project
- **Organization Name** – name of the institution
- **Multi-sessions** – **Y** indicates a multi-session activity; **N** indicates the activity was only one session

All columns with headers can be sorted by clicking on the column header.

Download and Print Activity Reports

When a user selects **View Activities**, a list of activity reports approved by an RML or Center will list.

- Subcontractors who have Basic or Author access may **Download** approved activities associated with their project
- Subcontractors who have Basic or Author access may **Download** activities submitted that are associated with their project

An activity report can be downloaded (saved) and printed in Portable Document Format (PDF) or HyperText Markup Language (HTML) after it has been **Approved** by the RML or Center. (Note: the PDF format is not 508 compliant).



To download or print an activity report:

1. Select **View Activities** under the Basic Menu
2. Select **View** next to the report to download or print
3. Select **PDF or HTML** from the Output Format drop box in the upper right corner of the Activity Report and select **Generate**

The activity report will then open as a PDF or HTML in a separate window. The activity report can then be saved or printed.

Author Menu



Users who are assigned **Author Access** in the Activity Reports application see the **Author Menu**, in addition to the Basic Menu.

The **Author Menu** allows the user to **Submit an Activity**, **Edit an Activity**, and **Edit a Multi-Group Activity**.

Submit an Activity

Users who are assigned **Author Access** (or a higher level of access) in the Activity Reports application may **Submit an Activity**. Subcontractors who have Author Access may **Submit** an activity for their Group.

The Activity Reports application has one template to be completed by all users of the application. The Activity Report template fields are explained below.

The screenshot shows the 'Activity Reports' application interface. At the top, there is a red header with the text 'Activity Reports' and the 'NN/LM' logo. Below the header, there is a navigation menu on the left with two sections: 'BASIC' and 'AUTHOR'. Under 'BASIC', there is a link for 'View Activities'. Under 'AUTHOR', there are three links: 'Submit an Activity' (highlighted with a red box), 'Edit an Activity', and 'Edit a Multi-Group Activity'. The main content area is titled 'Activity Report' and contains several form fields and buttons. At the top of the form area, there are buttons for 'Save', 'Copy', and 'Delete'. The form fields include: 'Multi-Group Activity' (checkbox), 'Region/Center' (dropdown menu), 'Contract Number' (text input), 'Project Title' (text input with an 'Add Project' button), a list of projects (with a 'Remove Project' button), 'Name of Organization and Component' (dropdown menus), and 'Add Organization-Component' and 'Remove Organization-Component' buttons.

Required fields are noted below with an asterisk (*). These fields must be completed before the report is submitted to the RML or Center for review.

- **Multi-Group Activity:** This field will be discussed in the following section **Submitting a Multi-Group Activity Report**.
- **Region or Center:** The Author's assigned Region or Center will automatically populate this field. If this information is incorrect, contact the RML or Center Portal Administrator for assistance.

- **Contract Number:** The Contract Number for the Region or Center where the Author is located will automatically populate.
- ***Project Title:** Enter one word from the project's title. **This field is case sensitive! If you think the word begins with an uppercase letter, enter it beginning with an uppercase letter.**

Example: If the title of the project is Outreach to African-American Teens, enter any of the main words in the title: Outreach or African-American or Teens. Make sure to enter the word starting with an uppercase letter.

- Highlight the correct title if more than one appears, and select **Add Project** to add the project to the box below. If the incorrect project is selected, highlight the project name and select **Remove Project**. If the correct project title does not appear, contact the RML or Center Portal Administrator for assistance.
- ***Name of Organization:** Identify the Organization name from the drop box and click to select.
- ***Component Name:** Identify the Component name from the drop box and click to highlight. Select **Add Organization-Component** to add to box below. If the incorrect Organization and/or Component are added to the box, highlight the Organization and Component and select **Remove Organization-Component**. If the correct Organization and/or Component do not display, contact the RML or Center Portal Administrator for assistance.

Name of Person Submitting the Activity:

Name of Person Who Conducted the Activity (if different from Person Submitting Report):

Email (Person Who Conducted the Activity):

Voice Number (Person Who Conducted the Activity): - -

Date Submitted: DD-MON-YYYY

- ***Name of Person Submitting the Activity:** Enter the name of the person who is completing the activity report.
- **Name of Person Who Conducted the Activity (if different from Person Submitting Report):** Enter the person’s name who conducted if the activity, if the person completing the activity report is different than the person who conducted the activity.
- **Email (Person Who Conducted the Activity):** Enter the email address of the person who conducted the activity.
- ***Voice Number (Person Who Conducted the Activity):** Enter the voice number of the person who conducted the activity.
- ***Date Submitted:** Select the date on the calendar when the activity report is submitted to the RML or Center.

Activity Information

Activity Name:

Activity Description (optional):

Types of Organizations Associated with Activity – Identify for the following :

- Individual who conducted the activity
- Location where activity was conducted
- Entities sponsoring the activity

(check all that apply – e.g. if you are an academic health sciences library, check both Health Sciences Library as well as Academic Institution)

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> Academic Institution | <input type="checkbox"/> Community Based Organization | <input type="checkbox"/> Government Agency | <input type="checkbox"/> K-12 |
| <input checked="" type="checkbox"/> Association | <input type="checkbox"/> Community College | <input type="checkbox"/> Health Sciences Library | <input type="checkbox"/> Public Health |
| <input type="checkbox"/> Clinic/Other Health Care | <input type="checkbox"/> Faith Based Organization | <input type="checkbox"/> Hospital | <input type="checkbox"/> Public Library |

Other (please specify)

Activity Content (check all that apply):

- | | | | |
|---|--------------------------------------|---|---------------------------------|
| <input type="checkbox"/> ClinicalTrials.gov | <input type="checkbox"/> DOCLINE | <input type="checkbox"/> MedlinePlus Connect | <input type="checkbox"/> PubMed |
| <input type="checkbox"/> ClinicalTrials.gov Results | <input type="checkbox"/> MedlinePlus | <input type="checkbox"/> NCBI (other than PubMed) | <input type="checkbox"/> TOXNET |

Other, technology content (please specify)

Other, non-technology content (please specify)

- ***Activity Name:** Enter the name of the activity, e.g. title of the class or presentation, or name/description of the site visit.
- **Activity Description (optional):** Description of the activity. Contact the RML or Center to determine if this field needs to be completed.

- ***Types of Organizations Associated with Activity - Identify for the following:**
 - Individual who conducted the activity
 - Location where activity was conducted
 - Entities sponsoring the activity

Check all of the organizations that identify the three criteria above.

***Example:** If you are in an academic health sciences library, check both Health Sciences Library as well as Academic Institution.*

If none of the organizations listed identify the individual who conducted the activity, location where the activity was conducted, or the entities that sponsored the activity, check “Other” and enter the organization type in the text box.

***Note:** “Government Agency” refers to Federal Government agencies. Do not check if the entity is a state or local government agency, or a Federal Government contractor.*

- ***Activity Content** (check all that apply): Check all of the content which were included in the activity.

If the activity included technology content that is not listed, check “Other, technology content” and enter the technology/technologies, in the text box.

If the activity included non-technology content that is not listed, check “Other, non-technology content” and enter the content covered, in the text box.

Activity was Conducted:

In-Person (person conducting activity and participants were face-to-face)

Enter ZIP Code where activity occurred:

Find County

▼

Add ZIP Code & County

Remove ZIP Code & County

- ***Activity was Conducted:**

- **In-person** (person conducting activity and participants were face-to-face): Select “In-person” if the person who conducted the activity was face-to-face with the participants.

Exception: If the person who conducted the activity was not face-to-face with the participants, but was in the same ZIP Code and County where the participants were located, select “In-Person.”

- **Enter ZIP Code where activity occurred:** Enter the ZIP Code for the location where the activity occurred and select **Find County**. Identify the county in the drop box and select **Add ZIP Code & County** to add to the box below. If the incorrect ZIP Code and County are selected, highlight and select **Remove ZIP Code & County**. If the activity consists of multiple sessions and more than one session was conducted in-person in different ZIP Codes and/or Counties, repeat the steps above for each ZIP Code.

Note: A ZIP Code may have multiple counties associated with it. It is important to identify the county where the activity occurred.

Activity was Conducted:

In-Person (person conducting activity and participants were face-to-face)

Remotely (person conducting activity and participants were in different locations)

Enter ZIP Code where person conducting activity was located:

- **Remotely** (person conducting activity and participants were in different locations): Select “Remotely” if the person who conducted the activity and the participants were in different ZIP Codes. This category includes teleconferences, web conferences, or an activity in which the person who conducted the activity was in a different ZIP Code and City, than the participants.
- **Enter ZIP Code where person conducting activity was located:** Enter the ZIP Code where the person was located while conducting the activity and

select **Find County**. Identify the county in the drop box and select **Add ZIP Code & County** to add to the box below. If the incorrect ZIP Code and County are selected, highlight and select **Remove ZIP Code & County**. If the activity consists of multiple sessions and there was more than one in-person session held in different locations (ZIP Codes and/or Counties), repeat the steps above for each ZIP Code.

Note: A ZIP Code may have multiple counties associated with it. It is important to identify the county where the person conducting the activity was located.

Activity was Conducted:

In-Person (person conducting activity and participants were face-to-face)

Remotely (person conducting activity and participants were in different locations)

Combination of in-person and remotely

Enter ZIP Code where in-person activity occurred:

- **Combination of In-person and Remotely:** Select “Combination of In-person and Remotely” if an activity consisted of more than one session where at least one session was conducted “In-person” and at least one session was conducted “Remotely.”
 - **Enter ZIP Code where in-person activity occurred:** Enter the ZIP Code for the location where the in-person activity occurred and select **Find County**. Identify the county in the drop box and select **Add ZIP Code & County** to add to the box below. If the incorrect ZIP Code and County are selected, highlight and select **Remove ZIP Code & County**. If the activity consists of multiple sessions and there was more than one in-person session held in different locations (ZIP Codes and/or Counties), repeat the steps above for each ZIP Code.

Note: A ZIP Code may have multiple counties associated with it. It is important to identify the county where the activity occurred.

The **Activity was Conducted** field captures where the person conducting the activity was located at the time of the activity. **Activity was Conducted** does **not** capture the types of users who benefit from an activity, and only partially represents where the activity occurred. Participant Information form data must be entered to capture data identifying the types of users who benefit from an activity and the location where impact is made. **The Participant Information form must be completed for each activity so that each Region, Center, and Network member can accurately demonstrate their impact in the NN/LM.**

Activity Included Multiple Sessions: Yes (If Yes, enter the date and number of participants for each session)

Date of Activity: DD-MON-YYYY

- **Activity Included Multiple Sessions:** Skip this field if the activity consisted of only one session.
- ***Date of Activity:** If the activity was only one session, select the date from the calendar on which the activity occurred.

Activity Included Multiple Sessions: Yes (If Yes, enter the date and number of participants for each session)

Date (DD-MON-YYYY): **Number of Participants:**

Multi-Session List:

- **Activity Included Multiple Sessions:** Check “Yes” if the activity consisted of multiple sessions.

Note: When “Activity Included Multiple Sessions” is checked, Date of Activity is replaced with Date and Number of Participants.

1. **Date:** Enter the dates for each of the sessions. Click inside the **Date** box and a calendar will display. Select the **Date** on which the first session occurred.

2. **Number of Participants:** Enter the number of individuals who participated in each session
3. Select **Add Session** and the Date and Number of Participants for the session will be added to the Multi-Session List
4. Repeat Steps 1-3 for each session that is part of the activity

Authors can edit an error in the Multi-Session list by highlighting the Date and Number of Participants in the Multi-Session box and selecting **Remove Session**. Re-enter the correct session information by following steps 1-3 above.

Participant Information

Estimated Number of Participants:

Minority Populations Present (Please report only when ≥50% of participants are minorities. Check ALL that apply):

African American
 Asian American
 Native Hawaiians and Pacific Islanders
 American Indian/Alaska Native
 Hispanic/Latino

Participant Information (Add, edit, or send an email to collect the Role, ZIP Code, and County for Activity Participants):

ID	Role	ZIP Code	County	Participants
<input type="button" value="Save"/>		<input type="button" value="Submit to Group"/>		

- ***Estimated Number of Participants:** Enter the estimated number of individuals who participated in the activity. (If Yes was checked for **Activity Included Multiple Sessions**, this field will not appear).
- **Minority Populations Present** (Please report only when ≥50% of participants are minorities. Check ALL that apply): If 50% or more of the participants are from minority populations, identify all minority populations represented.

- **Participant Information** (Add, edit, view, or send an email to collect the Role, ZIP Code, and County for Activity Participants): Select **Go to Participant Information Form** to do the following:
 - Manually add Participant Information collected on paper forms
 - Edit Participant Information
 - View Participant Information
 - Send an email to Participants requesting they submit their Role, ZIP Code, and County information, electronically

The Participant Information form is discussed in detail in the “Participant Information Form” section of the *Manual*.

- **Save:** There are two “Save” buttons, located in the upper left and lower left of the template. Save allows the Author to save a report that is in progress, and to edit the report as needed. As long as a report is being saved, it is considered incomplete. Save does not send the report to the RML or Center Approver for review.
- **Submit to Group:** Select “Submit to Group” to submit the report for review.

Note: Approvers will not see a “Submit to Group” option. The Approver will “Save” the activity, then “Approve” the activity report.

Copy an Activity Report

An Author may **Copy** an activity report. The activity report must be saved before it can be copied; it can be one that is incomplete or approved. A copied activity report can be **Saved** and edited in the future (under **Edit an Activity**, or **Edit a Multi-Group Activity** in the case of a Multi-Group Activity), or it can be completed and submitted.

Note: If a form with Participant Information data is copied, the Participant Information data will also be copied. This data can be edited or deleted on the copied form.

1. Identify an activity report to be copied. The activity report will be one of the following:
 - a. An activity report the Author is currently working on
 - b. An activity report that has been approved and is located under **View Activities**
 - c. An activity report that has been saved, has not been submitted, and is located under **Edit an Activity** or **Edit a Multi-Group Activity**



2. Select **Copy** in the upper left area of the activity report form. The application will respond with “Form has been copied” in green in the upper left of the Activity Report



3. Under the Author menu, select **Submit an Activity**. A new activity report form will load
4. Select **Paste** in the upper left area of the form to paste the copied activity report
5. Select **Save**. The activity report can be edited now, or in the future

Delete an Activity Report

Located in the upper left corner of the activity report form is the **Delete** button.



If an Author decides not to complete an activity report and does not want to save the report, the report can be deleted.

***Note:** If Delete was selected in error, contact the Portal Administrator to restore the activity report. The following information must be provided on the report so it can be retrieved: Portal username, project title, and date the report was deleted.*

Submit a Multi-Group Activity Report

A Multi-Group Activity is an activity conducted by two or more different Groups (RMLs, Centers, or Subcontractors). One activity report is submitted and each of the Groups who conducted the activity are identified on the report. The activity will reflect in each Group's Activity Report statistics (i.e. each Group will get "credit" when participating in a multi-group activity).

***Example:** If a Subcontractor and RML staff co-teach a class, the RML (Author or Approver) enters the activity report, making sure to check indicate this was a "Multi-Group Activity" by checking the "Yes" box. The same applies for the following scenarios when two or more individuals from different Groups conduct the same activity: Center staff and RML staff; RML staff from Region A and RML Staff from Region Z; a Subcontractor and Center staff; Subcontractor from Project B and Subcontractor from Project Y.*

***Important:** An RML or Center Author or Approver who co-conducted the activity must enter the activity report (instead of a Subcontractor who co-conducted the activity). A Subcontractor who co-conducts an activity with RML or Center staff has an opportunity to review the report before it is submitted.*

***Note:** A limit of 11 Groups can conduct a single activity.*

Only the fields affected by selecting "Multi-Group Activity" are explained below. All other fields are completed as explained in the **Submit an Activity** section of the *Manual*.

Activity Reports

BASIC

- View Activities

AUTHOR

- **Submit an Activity**
- Edit an Activity
- Edit a Multi-Group Activity

Activity Report

Multi-Group Activity: (If Yes, identify ALL Regions/Centers that participated in the activity) Yes

Region/Center:

<input type="checkbox"/> MIDDLE ATLANTIC	<input checked="" type="checkbox"/> SOUTHEASTERN ATLANTIC
<input checked="" type="checkbox"/> GREATER MIDWEST	<input type="checkbox"/> MIDCONTINENTAL
<input checked="" type="checkbox"/> SOUTH CENTRAL	<input type="checkbox"/> PACIFIC NORTHWEST
<input type="checkbox"/> PACIFIC SOUTHWEST	<input type="checkbox"/> NEW ENGLAND
<input type="checkbox"/> NLM Training Center	<input type="checkbox"/> Outreach Evaluation Resource Center
<input type="checkbox"/> Web Services Technology Operations Center	<input type="checkbox"/> TEST

Contract Number: HHS-N-276-2011-00004-C, HHS-N-276-2011-00005-C, HHS-N-276-2011-00007-C

Project Title:

South Central Region Contract 2011 - 2016 (5005)
 National Network of Libraries of Medicine Souteastern/Atlantic Region 2011-2016 (Outreach Library 2011-2016: The University of Iowa Library of the Health Sciences

Name of Organization and Component:

Organization:

Component:

Houston Academy of Medicine (6024) /// Texas Medical Center Library (2292)
 University of Maryland, Baltimore (5038) /// Health Sciences & Human Services Lit
 University of Iowa (1406) /// Hardin Library for the Health Sciences (2547)

- **Multi-Group Activity:** Check **Yes**.
- **Region or Center:** The Region or Center for the Author will automatically populate, based upon the assigned Region or Center when the Author’s application was processed. Check the Region or Center boxes for all of the other individuals who conducted the activity.
- **Contract Number:** The contract number for the Region or Center where the Author is located will automatically populate, based upon the assigned Region or Center when the Author’s application was processed. As the Author selects Regions or Centers for others who also conducted the activity in **Region or Center**, the corresponding contract numbers will automatically populate this field.

- ***Project Title:** Enter project titles for each Group who conducted the activity. (For Subcontractors, this will be the Subcontractor’s project title). Start by entering the project title for the main project on which the activity was conducted, click on the correct title if more than one appears, and select **Add Project** to add the project to box below. **This field is case sensitive!**

Note: When an RML or Center Author or Approver checks “Yes” for Multi-Group Activity and selects the Regions/Centers, project titles for all Regions/Centers checked will load from the OPD.

- ***Name of Organization:** Identify the organization name from the drop box and click to select.
- ***Component Name:** Identify the component name from the drop boxes and click to select. Select **Add Organization-Component** to add to box below. If the incorrect organization and/or component are added to the box, highlight the organization and component and select **Remove Organization-Component**. If the correct organization and/or component do not display, contact the RML or Center Portal Administrator for assistance.
- **Name of Person Who Conducted the Activity** (if different from Person Submitting Report): Enter the names of the individuals who also conducted the activity, separated by commas.

Edit an Activity

Users who are assigned **Author Access** in the AR may **Edit an Activity**, as long as the activity report is incomplete. (Only incomplete activity reports that have not yet been submitted, appear under **Edit an Activity**). An incomplete activity report is one that is: in progress, is being saved, has not been submitted to the RML or Center Approver for review, or has been denied by the RML or Center and requires the Author to edit the activity report.

Approved Subcontractor activity reports will automatically list under “Attachment 1: Activity Reports summary data: Subcontractor activities” of the Subcontractor’s NN/LM Interim/Quarterly or Final Report.

- RML and Center Staff who have Author Access may **Edit** any activity report from their Group (RML or Center reports, as well as Subcontractor reports).

Note: The last person who edits an activity report becomes the Author of that report.

Note: After an Author submits an activity report to the RML or Center Approver, the Author may no longer edit the activity report. Only RML and Center Staff with Approver Access or Portal Administrators can edit the activity report.

- Subcontractors who have Author Access may **Edit an Activity** for the project with which they are associated

Exception: After a Subcontractor submits an activity report to the RML or Center, the Subcontractor may no longer edit the activity report. Only RML and Center Staff who have Approver Access and Portal Administrators may edit the report.

When a user selects **Edit an Activity**, the activity reports on which the user is an Author will list. The following information will display:

The screenshot shows the 'Activity Reports' interface. On the left is a navigation menu with 'BASIC' and 'AUTHOR' sections. Under 'AUTHOR', 'Edit an Activity' is highlighted with a red box. The main area displays a table titled 'Activities' with columns for ID, PROJECT TITLE, and ORGANIZATION NAME. The table contains three rows of activity data.

ID	PROJECT TITLE	ORGANIZATION NAME
Edit 364	Training Award - Coastal AHEC and Cape Fear Community College (2768)	Cape Fear Community College
Edit 394	Southeastern Atlantic Region (2)	University of Maryland, Baltimore
Edit 397	National Network of Libraries of Medicine Souteastern/Atlantic Region 2011-	University of Maryland, Baltimore

- **Edit** – select an activity report to edit
- **ID** – a tracking number specific to the Activity Reports application
- **Project Title** – name of the project
- **Organization Name** – name of the RML, Center, or Subcontractor’s institution

All columns with headers can be sorted by clicking on the column header.

The Author edits the activity report and saves the report as needed, until the report is complete and ready to be submitted to the RML or Center Approver by selecting “Submit to Group.”

When an activity report is successfully saved, the Author will see a message in green at the top of the template indicating: **Your report has been saved.**

***Note:** If an Author selects “Submit to Group” before selecting “Save,” the edits will be saved in the system before the report is submitted.*

When an Author successfully submits an activity report to the RML or Center Approver, the Author is taken out of the template and back to the “View Reports” screen, where the Author will receive a confirmation message in green, at the top of the screen: **Your report has been submitted to your Group Administrator.**

Errors are indicated in red at the top of the template and also with an asterisk * at the end of the field where the error occurs.

The RML and Center Approvers will receive a Portal generated email indicating that a new activity report has been submitted for review.

Denied Activity Reports

When an activity report is denied, the Portal will send the Author an email indicating the reasons the report was denied.



A denied activity report is considered incomplete. The Author accesses the denied activity report under **Edit an Activity**, makes the necessary edits, and resubmits the report for review. Until an activity report is approved, it will not auto-list on a Subcontractor’s Online Contract Report.

Edit a Multi-Group Activity

Users who are assigned **Author Access** in the AR and are included in a multi-group activity may **Edit a Multi-Group Activity**, as long as the multi-group activity report is incomplete. Only incomplete multi-group activity reports that have not yet been submitted, appear under **Edit a Multi-Group Activity**.

An incomplete multi-group activity report is one that is: in progress, is being saved, has not been submitted to the RML or Center Approver for review, or has been denied by the RML or Center and requires the Author to edit the multi-group activity report.

The screenshot shows the 'Activity Reports' interface. On the left, there is a navigation menu with 'BASIC' and 'AUTHOR' sections. Under 'AUTHOR', the option 'Edit a Multi-Group Activity' is highlighted with a red box. The main content area is titled 'Multi-Group Activities' and contains a table with the following data:

ID	PROJECT TITLE	ORGANIZATION NAME
Edit 339	Wicomico County Health Department - Electronic Access to Health Information	Wicomico County Health Department
Edit 390	Outreach Library 2011-2016: The University of Iowa Library of the Health Sc	University of Iowa

Approved multi-group activity reports in which RML staff participated will automatically list under “Attachment 1: Quarterly Activity Reports summary data: RML staff activities” of the RML Quarterly Report based upon the Date of Activity entered.

Approved multi-group activity reports in which Subcontractors participated will automatically list under “Attachment 1: Activity Reports summary data: Subcontractor activities” of the Subcontractor’s NN/LM Interim/Quarterly or Final Report.

When a user selects **Edit a Multi-Group Activity**, the activity reports on which the user is an Author will list. The following information will display:

- **Edit** – select an activity report to edit.
- **ID** – a tracking number specific to the Activity Reports application.
- **Project Title** – name of the project.
- **Organization Name** – name of the RML, Center, or Subcontractor’s institution.

All columns with headers can be sorted by clicking on the column header.

The Author edits the multi-group activity report and saves the report as needed, until the report is complete and ready to be submitted to the RML or Center Approver by selecting “Submit to Group.” When an activity report is successfully saved, the Author will see a message in green at the top of the template indicating: **Your report has been saved.**

***Note:** If an Author selects “Submit to Group” before selecting “Save,” the edits will be saved in the system before the report is submitted.*

When an Author successfully submits a multi-group activity report to the RML or Center Approver, the Author is taken out of the template and back to the “View Reports” screen, where the Author will receive a confirmation message in green, at the top of the screen: **Your report has been submitted to your Group Administrator.**

Errors are indicated in red at the top of the template and also with an asterisk * at the end of the field where the error occurs.

The RML and/or Center Approvers of the users represented on the activity will receive a Portal generated email indicating that a new multi-group activity report has been submitted for review.

Denied Multi-Group Activity Reports

When a multi-group activity report is denied, the Portal will send the Author an email indicating the reasons the report was denied.

Activity Report Denied

 DO-NOT-REPLY@nlm.nih.gov

Sent: Thu 4/25/2013 10:32 AM

To:  Bougard, Renee (NIH/NLM) [E]

An activity report submitted by you has been denied. Reason: Forgot to add session for 4.17.13.

To log in and make corrections, click here: <https://opdqa.nlm.nih.gov>. If you require assistance, please contact your RML Portal Administrator at 1.800.338.7657, Press 1. DO NOT REPLY to this email.

Thank you.

A denied activity report is considered incomplete. The Author accesses the denied activity report under **Edit a Multi-Group Activity**, makes the necessary edits, and resubmits the report for review. Until a multi-group activity report is approved, it will not auto-list on a Subcontractor’s Online Contract Report.

Participant Information Form

It is important to note that the **Activity was Conducted** field on the activity report form captures where the person conducting the activity was located at the time of the activity, only. **Activity was Conducted** does **not** capture the types of users who benefit from an activity, and only partially represents where the activity occurred. Participant Information form data must be entered to capture data identifying the types of users who benefit from an activity and the location where impact is made. **The Participant Information form must be completed for each activity so that each Region, Center, and Network member can accurately demonstrate their impact in the NN/LM.**

The Participant Information form captures the following information:

1. Roles of individuals who participate in an activity
2. Geographical location of the participant

This data is used to demonstrate the types of users who benefit from NN/LM activities and where NN/LM activities make an impact, geographically. This information is important to all users of the Activity Reports application. **Without Participant Information data, each Region, Center, and Network member is unable to accurately demonstrate their impact in the NN/LM.**

There are three ways to collect participant information:

1. Manually, using the Participant Information form. The Participant Information form is located at (<http://guides.nnlm.gov/content.php?pid=412686&sid=3371546>) It can be printed and made available for participants to complete during an in-person activity.
2. Generating an email in the Activity Reports application, requesting that participants submit the information, electronically.
3. Combination, using both the manual and electronic.

Entering Participant Information Collected Manually

Authors who manually collect participant information on an activity enter the information into the Participant Information form, which is part of the Activity Report.

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. Select **Submit an Activity**
4. Complete the activity report form
5. Select **Save** in the lower left of the activity report form
6. Near the end of the Activity Report form, select **Go to Participant Information Form**
7. Select **Enter or Edit Participant Information (manual)**

8. Under **I am a:** select the corresponding roles.

Note: When “General Public” is selected, no other category should be checked.

9. Under **ZIP Code**, enter the ZIP Code and select **Find County**. The ZIP Code will automatically map to the County. If more than 2 counties are associated with a ZIP Code, select the correct county.

Note: In rare circumstances, a ZIP Code may not map to a county. The Author will see “NO COUNTY FOUND.” Contact the Portal Administrator and include the following information for the participant: Activity ID #, Organization Name, Project Title, Activity Name, Date of Activity, Role, ZIP Code, County, and Number of Participants.

10. Enter the **Number of Participants** with this role, ZIP Code, and County. If more than one participant has identical information, enter the number of participants who have matching information (instead of entering a row for each participant).

11. Select **Save**

12. Determine the number of remaining Participant Information records that will be entered, manually. Enter that number in the box and Select **Add Row (s)**. The Portal will

provide the number of additional rows entered in the box. (Repeat this step if additional rows are needed).

13. Follow steps in 8-11. Repeat these steps until all of the information collected on the participants has been entered.
14. When all participant records are entered, select **Back to Activity Report** in the lower right corner.
15. After the Author returns to the Activity Report form, the Author may:
 - a. Edit the Activity Form
 - b. Save the Activity Form
 - c. Submit the Activity Form and Participant Information to the RML or Center for review (Submit to Group)

The Author of the activity report can also view the participant information entered manually by selecting **Enter or Edit Participant Information (manual)**.

View Participant Information Entered Manually

Participant information entered manually can be viewed in two locations. The first location is at the bottom of the activity report form:

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. If the activity report has been approved, select **View Activities** under the Basic Menu
4. Under the Author Menu, select an activity to view
5. Scroll to the bottom of the activity report. Under **Go to Participant Information Form**, a summary of the participant information entered manually (and collected electronically) is displayed, along with the number of participants on which data has been collected.

***Note:** It is usually possible to accurately estimate the number of participants in an activity, but there are times when information may not be collected on all activity participants; therefore, the Estimated Number of Participants and the Number of Participant Info Data Collected may not be the same number.*

Participant Information

Estimated Number of Participants:

Minority Populations Present (Please report only when ≥50% of participants are minorities. Check ALL that apply):

African American
 Asian American
 Native Hawaiians and Pacific Islanders
 American Indian/Alaska Native
 Hispanic/Latino

Participant Information (Add, edit, or send an email to collect the Role, ZIP Code, and County for Activity Participants):

[Go to Participant Information Form](#)

ID	Role	ZIP Code	County	Participants
1	Health Professional (including health professional students)	20912	Prince Georges	1
2	Health Professional (including health professional students)	70542	Cameron	1
3	Health Professional (including health professional students)	70542	Cameron	1
4	General Public	20912	Montgomery	5

Number of Participant Info Data Collected: 8

The second way an Author may view participant information entered manually is on the Participant Information form:

1. Login to the Portal
2. Select **the Activity Reports (AR)** icon
3. Under the Author Menu, select **Edit an Activity**
4. Identify the activity to view submitted participant information data and select **Edit** next to the activity
5. Scroll to the bottom of the activity report. Select **Go to Participant Information Form**
6. Select **Enter or Edit Participant Information (manual)**. The participant information entered manually will display.

Edit Participant Information Entered Manually

An Author may **Edit** participant information entered manually as long as the activity report has not been submitted to the RML or Center.

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. Under the Author Menu, select **Edit an Activity**

4. Scroll to the bottom of the activity report. Select **Go to Participant Information Form**
5. Select **Enter or Edit Participant Information (manual)**
6. Make necessary edits
7. To delete a row of participant information, check the **Delete** box and select **Delete Selected Row(s)**
8. Select **Save**

Requesting Participant Information Electronically

Authors may request that participants submit their information electronically, before, during, or following an activity. The Activity Reports application is used to generate the email that is sent to the participants. Email addresses of activity participants are required for this option.

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. Under the Author Menu, select **Submit an Activity**
4. The following fields on the Activity Report form **must** be completed before the Participant Information form can be accessed:
 - a. Project Title
 - b. Organization Name
 - c. Component Name
 - d. Activity Name
 - e. Date of Activity OR Activity Included Multiple Sessions. If “Activity Included Multiple Sessions” is checked, only the dates of the sessions must be entered at this time.
5. Select **Save** on the lower left of the form
6. Select **Go to Participant Information Form**

Activity Reports NN/LM

Participant Information

Note: The information collected is for project evaluation purposes, only.

Enter or Edit Participant Information (manual)

Request or Edit Participant Information (electronic)

Email Activity Participants to submit their Participant Information (Role, ZIP Code, and County) to you, electronically.

Password for this Activity: NSIs3CHGnLgdjAV

Note: The Activity Password is unique to this activity. Do NOT use this password for other activities. This password along with a link will be sent to all the emails listed below.

Add Email Addresses for Activity Participants

Note: Use a comma to separate email addresses.

nurse@hospital.org, doctor@clinic.com, librarian@hsl.edu

Email Participants

Remove Participants

Note: Please enter the email addresses of the participants that need to be removed. Use a comma to separate email addresses.

Remove Participant(s)

Imported Participant Data

Note: The data below updates as participants complete the Participant Information Sheet.

I am a: (Check ALL that apply) ZIP Code

[Back to Activity Report](#)

7. Check **Request or Edit Participant Information (electronic)**
8. An **Activity Password** is automatically generated for the activity. This password is unique and specific for this activity. Do NOT use this password for other activities. If participants use the same password for different activities, their information will map only to the activity for which this password “belongs,” thereby skewing the data.
9. **Add Email Addresses for Activity Participants** – Enter the email addresses of individuals registered/who attended an activity. Separate email addresses with commas
10. Send the request to the participants by selecting **Email Participants**. A confirmation message in green will appear at the top of the form: **Email has been sent to the participants.**

Note: If “Email Participants” is clicked more than once, multiple emails will be sent to the participants.

The email generated by will include:

- name of the activity
- date(s) of the activity
- a URL for a login page where the participant will enter:
 - the email address they provided to the Author
 - a password specific to the activity included in the email (passwords are case sensitive)

The email will look similar to the one below:

Participant Information Requested for Upcoming Class/Activity

DO-NOT-REPLY@nlm.nih.gov
 You forwarded this message on 10/23/2012 12:34 PM.
 Sent: Tue 10/23/2012 12:27 PM
 To: Bougard, Renee (NIH/NLM) [E]

Activity Name: Multi Date Test
 Date(s) of Activity(ies): 09-OCT-2011, 10-OCT-2011, 11-OCT-2011

Please complete the three question Participant Information profile located at (<https://preqa.nlm.nih.gov/participant>) Enter the email address where you received this message, and enter this password: 7suFATKikHKYyq

Participant Information is collected for project evaluation purposes, only. Thank you!

The participant is taken to the following web page. The address where the email was received, and the password included in the email are entered.

The participant information form will display:

The participant will:

1. Identify his/her role(s) by checking the appropriate boxes under **I am a:**
2. Enter **ZIP Code**
3. Select **Find County**
4. Select **Submit**
5. Select **Logout**

View Participant Information Submitted Electronically

Authors may view participant information responses as they are submitted.

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. Under the Author Menu, select **Edit an Activity**
4. Identify the activity to view submitted participant information data and select **Edit** next to the activity
5. Scroll to the bottom of the Activity Report, and select **Go to Participant Information Form**
6. Check **Request or Edit Participant Information (electronic)**

Activity Reports NN/LM

Participant Information

Note: The information collected is for project evaluation purposes, only.

- Enter or Edit Participant Information (manual)
- Request or Edit Participant Information (electronic)

Email Activity Participants to submit their Participant Information (Role, ZIP Code, and County) to you, electronically.

Password for this Activity: kCpCKWtlySkEtJ4

Note: The Activity Password is unique to this activity. Do NOT use this password for other activities. This password along with a link will be sent to all the emails listed below.

Add Email Addresses for Activity Participants

Note: Use a comma to separate email addresses.

nurse@hospital.org, doctor@clinic.com, librarian@hsl.edu

Remove Participants

Note: Please enter the email addresses of the participants that need to be removed. Use a comma to separate email addresses.

Imported Participant Data

Note: The data below updates as participants complete the Participant Information Sheet.

I am a: (Check ALL that apply)			ZIP Code
<input type="checkbox"/> General Public	<input type="checkbox"/> Library Staff – Health Sciences	<input type="checkbox"/> Student – College	70542
<input checked="" type="checkbox"/> Health Professional (including health professional students)	<input type="checkbox"/> Library Staff – Public	<input type="checkbox"/> Student – K-12	County Vermilion ▾
<input type="checkbox"/> Information Specialist (not Library Staff)	<input type="checkbox"/> Library Staff – Other	<input type="checkbox"/> Staff – K-12	Number of Participants: 1
<input type="checkbox"/> Library Staff – Community College	<input type="checkbox"/> Public Health Worker		
<input type="checkbox"/> Other (please specify): <input style="width: 150px;" type="text"/>			

7. Scroll down to **Imported Participant Data** section. The table will update as participants submit their information.
8. Select **Back to Activity Report** in the lower right corner. At this point, the Author may:
 - a. Exit the Activity Reports application by selecting another application in the Portal, or selecting **Logout** at the bottom of the Portal screen

- b. Complete a portion or all of the Activity Reports. Select **Save** to save the data entered to continue working on the activity report at a later time.
- c. Complete the Activity Report and send the activity report to the RML or Center for review by clicking **Submit to Group**

Edit Participant Information Submitted Electronically

An Author may **Edit** participant information that was submitted electronically as long as the activity report has not been submitted to the RML or Center.

1. Login to the Portal
2. Select the **Activity Reports (AR)** icon
3. Under the Author Menu, select **Edit an Activity**
4. Scroll to the bottom of the activity report. Select **Go to Participant Information Form**
5. Select **Request or Edit Participant Information (electronic)**
6. Make necessary edits
7. To delete (a row of) participant information that was submitted electronically:
 - a. Identify the **Delete Participants** section of the participant information form
 - b. Enter the email addresses for participants to be deleted. Separate email addresses with commas.
 - c. Select **Delete Participants**
8. Select **Save**

Combination: Entering Participant Information Collected Manually and Requesting Participant Information Electronically

Authors may use a combination of manually and electronically collecting Participant Information. This combination might be used when the Author does not receive an optimal response to the electronic request for participant information. The process is a two-step process:

1. Follow the instructions in the Entering Participant Information Collected Manually section
2. Follow the instructions in the Requesting Participant Information Electronically section

View Combination

There are two ways to view participant information:

1. On the Participant Information form:
 - a. Select **Enter or Edit Participant Information (manual)** to view the data entered manually.

- b. Select **Request or Edit Participant Information (electronic)** to view the data submitted electronically by participants.
2. On the Activity Report form, at the end of the Participant Information section. This summary view shows the manual and electronic participant information, combined.

***Note:** The Author must first view the participant information collected electronically on the Participant Information form before the data collected electronically will appear at the bottom of the activity report form.*

When the Participant Information form is printed, there will be no distinction between information collected manually or electronically.

Edit Combination

Follow the instructions in the sections Edit Participant Information Entered Manually and Edit Participant Information Electronically.

Collecting Participant Information for Multiple-Session Activities

If an activity consists of multiple sessions, participants should be accounted for only once on the Participant Information form. Only information on unique participants should appear on the PI form. A single PI form can be used for all sessions in a multi-session activity.

***Example:** A PubMed class consists of 3 (multiple) sessions:*

Session 1 is an in-person class with 20 participants. Capture participant information from everyone who attends Session 1.

Session 2 is conducted remotely with 22 attendees (20 are the same from Session 1; 2 new attendees have joined the class in Session 2). Determine which participants did not provide their participant information in Session 1 and capture this information only for those individuals. (Theoretically, only 2 participants will provide participant information because they did not attend Session 1).

Session 3 is conducted remotely with 18 attendees. (There are no new attendees. These 18 participants attended either or both Sessions 1 & 2). All participant data has been captured; there is no need to obtain participant information from any attendees in Session 3.

In this example, there are an estimated number of 22 participants in the activity. (The highest number of unique participants in any of the sessions

is used to determine this value).

Activity Report and Participant Information Forms

The Activity Report and Participant Information forms are available in Portable Document Format (PDF) at the following locations:

1. Selecting the **Help** icon in The Portal
2. On the NN/LM Outreach Evaluation Resource Center website
(<http://guides.nlm.gov/content.php?pid=412686&sid=3371546>)

Both forms are interactive, and can be filled-in, saved, emailed, and printed.