Instruction Manual for Grantees of the National Research Service Award in Primary Care

Annual Performance Report
Welcome

Welcome to the Bureau of Health Workforce’s Performance Measures Handbook (BPMH)! This instruction manual has been carefully designed to assist your organization in completing the required Performance Report for Grants and Cooperative Agreements (PRGCA). Please read through this manual carefully, as it contains examples and a series of step-by-step instructions that will aid you in completing all required forms.

1. All required performance measures are linked to the following legislative purpose(s) of the National Research Service Award in Primary Care grant program:
   - Develop or enhance postdoctoral research training opportunities for individuals who are planning to pursue careers in primary care research.

2. Data submitted by grantees of the program must cover all activities that took place between July 01, 2017 - June 30, 2018 (Referred to as Annual Performance Report).

3. The PRGCA is due no later than July 31, 2018. Failure to submit a PRGCA by this date may place your grant in a noncompliant status.

4. Officials at the Health Resources and Services Administration (HRSA) will review and approve all PRGCAs submitted by grantees. In the case that revisions are needed, you will be granted the ability to re-enter the BPMH system, make corrections, and submit a revised PRGCA. All revisions must be resubmitted within five (5) business days of the initial request. Failure to resubmit a revised PRGCA within five (5) business days may place your grant in a noncompliant status.

5. We appreciate your feedback and assistance during this process. If you have any questions or require further assistance in completing your PRGCA, please visit the grants homepage or contact the HRSA Contact Center. All requests for technical assistance will be coordinated through the Call Center and responded to promptly: Call Center Phone Number: 877-G04-HRSA (877-464-4772) or Call Center Online Assistance Form: click here.
Getting Started

The Office of Management and Budget (OMB) has issued a 3-year approval for the annual collection of performance measures across all grants and cooperative agreements funded through the Health Resources and Services Administration's Bureau of Health Workforces (BHW) (OMB # 0915-0061; Expiration Date: 06/30/2019). The BPMH system has been significantly enhanced to incorporate all approved subforms, as well as increase system performance and functionality. Throughout the manual, there are several icons that identify tips and other important information that will assist you in completing each subform accurately (see below).

 Marks a warning statement. Please read information in bold carefully in order to complete each subform accurately.

 Marks a tip or important note for completing a specific column or subform in the BPMH system.

 Marks the end of a subform and provides instructions for initiating required validations checks.

Due to the nature of annual reporting, the BPMH system has been recently enhanced to prepopulate specific columns within certain subforms with data submitted in a previous reporting period. In addition, a "View Prior Period Data" link has been added at the top of each subform in order to provide you with easy access to data submitted by your organization in prior reporting periods.

![Figure 1. Screenshot of View Prior Period Data Link](image-url)
Getting Started - How Performance Measure Data Fields Are Identified in the Forms

There are two (2) types of data entry field identifiers. Each data entry field in a performance measure is identified with both types of numbers when the measure appears like the example in the above Figure.

1. **Column Numbers**: The first is a Column number. It is contained in parentheses above the Block number. Column numbers are unique to the field in a particular form and are used to identify error messages. If you receive an error message, it will refer to a Column Number. In that circumstance, find the Column number in the form to locate the error. Data fields that are prepopulated may only be identified with a Column number as shown in Column #1 in the above Figure.

2. **Block Numbers**: The second type of identifier is a Block number. Block numbers are also unique to a data entry field and correspond to the paper version of the performance measures. If you print the performance measures or received paper copies, the data fields are identified with a Block number. The Block numbers here in the EHB are the same as what appears in the paper copies of the performance measures. Nearly all fields where you enter data will be identified with a Block number.
Getting Started: Browser Settings

⚠️ Warning: Check your browser settings before beginning your PRGCA. Incompatible browsers or incorrect settings will cause forms to display incorrectly.

1. HRSA’s Electronic Handbook system (EHB) is compatible only with certain Internet browsers that have specific settings. Please check your settings by logging into EHB and clicking the ‘Recommended Settings’ tab that appears in the yellow banner at the top left of your home screen. The system will check your browser and its settings for compatibility.

2. There are multiple checks that are performed, and you must receive green check marks next to each setting in order to proceed. The following link will direct you to a page that displays the list of the checks performed: [Recommended Settings](#).

3. Opening this link in your browser will automatically perform the recommended settings checks. Alternatively, you can access the recommended settings page in the EHBs system by clicking the ‘Recommended Settings’ tab on your EHBs home screen. It is highly recommended to check your settings prior to entering data in the BPMH system.

4. Using different browsers or settings than what is described above may produce unpredictable results. If you find that you are unable to see dropdown menus, cannot enter data into a field, or a form is not appearing, you most likely have a browser compatibility problem.

5. Please check these settings prior to calling the HRSA Call Center or your Government Project Officer. You may be asked to provide a screenshot showing the results of the ‘Recommended Settings’ tab.
Getting Started: Helpful Resources and Recommendations

The following is a list of resources and tips you may find helpful in the event you need assistance:

1. Begin PRGCA data entry early and submit your report prior to the deadline.
2. **Browser Settings:** Check your Internet browser and its settings by using ‘Recommended Settings’ tab on the EHB home screen within the yellow banner in the top left corner of the screen. Look for green check marks for all system requirements in order to meet system requirements and proceed.
3. **Reporting on Your Grant:** Several resources are available through HRSA’s “Reporting on Your Grant” link [https://bhw.hrsa.gov/grants/reportonyourgrant](https://bhw.hrsa.gov/grants/reportonyourgrant) including general EHB guidance as well as links to the performance measures and program manual.
4. **Resource Links:** Several resources are available via the ‘Resource’ tab on the EHB home screen including the following links:
   1. View Prior Period Data- Previously submitted PRGCA data are available in read-only mode
   2. Glossary- Current definitions of key terms
   3. Instruction Manual- Electronic copy of this program manual (can also be found on the HRSA.gov website)
5. **Video Recordings:**
6. **Grant Personnel:** Review your grant personnel listed in EHB and update this list as necessary. Ensure that listed personnel have appropriate authorizations (i.e., PRGCA submission, etc.). Make sure you have a backup person in place to submit your report!
7. **Sequence of Forms:** Complete PRGCA forms in the order they appear (i.e., complete EXP-1 prior to EXP-2)
8. **Saving and Validating:** You must click ‘Save and Validate’ in order to move to the next form. Save your work frequently (every 15-20 minutes) and print a hard copy of your report prior to submission.
9. **Government Project Officers:** Contact your Government Project Officer if you need further assistance on the content of your report.
10. **HRSA Call Center:** If you need additional assistance, contact the HRSA Call Center. If you have contacted the Call Center and are waiting for a reply, you should follow-up with them 48 hours after the initial contact. Have your ticket number ready (the same ticket number will be used at all tier levels now). Do not wait for the Call Center to return a phone call or email: Call Center Phone Number: 877-Go4-HRSA/877-464-4772 or Call Center Online Assistance Form [click here](https://help.hrsa.gov/display/public/EHBSKBFG/BPMH+Videos).
The following table shows the order that subforms will appear throughout the BPMH system for your specific grant program. Please note that clicking on the "Save and Validate" button at the end of each subform will cause the system to check all Blocks for errors and route you to the next required subform on the list. If you need to go back to any subform for any reason, simply click on the Form ID on the left sidebar of the Electronic Handbook (EHB). Please note that changing data that has already been saved will require you to click on the "Save and Validate" button and go through the validation process once more.

<table>
<thead>
<tr>
<th>Order</th>
<th>Type of Form</th>
<th>Parent Form</th>
<th>Form ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Faculty Development</td>
</tr>
<tr>
<td>2</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>IND-GEN</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>INDGEN-PY</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>Course Development and Enhancement-CDE Subforms</td>
<td>CDE-1</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>Course Development and Enhancement-CDE Subforms</td>
<td>CDE-2</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-1a</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-1b</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-2a</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-2b</td>
</tr>
<tr>
<td>Order</td>
<td>Type of Form</td>
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<td>10</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-4a</td>
</tr>
<tr>
<td>11</td>
<td>Performance Data Form</td>
<td>Faculty Development, Instruction, and Recruitment-FD Subforms</td>
<td>FD-4b</td>
</tr>
</tbody>
</table>
Faculty Development – Setup

Selecting Faculty Development Activities

<table>
<thead>
<tr>
<th>Faculty Development Activities</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structured Faculty Development Training Program</td>
<td>☐</td>
</tr>
<tr>
<td>Faculty Development Activity</td>
<td>☐</td>
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<tr>
<td>Faculty Instruction</td>
<td>☐</td>
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<tr>
<td>No faculty-related activities conducted</td>
<td>☐</td>
</tr>
</tbody>
</table>

Figure 3. Selecting Faculty Development Activities

The Faculty Development Setup form will configure all subforms specific to faculty development.

- Select the type(s) of faculty development activities supported with grant funds during the current reporting period under Block 1.
- Options for the Faculty Setup form are pre-selected based on your prior annual reporting.
- Please see the warning statement below regarding unchecking an option.

**Warning:** Options for the Faculty Setup form will be automatically selected if you have previously reported one or more training programs or activities through the FD-1a or FD-2a subforms. You may uncheck “Faculty Development Activity” if you have nothing to report. You may uncheck “Structured Faculty Development Training Program” only if you have no training programs still in progress. Please refer to the Faculty Development—FD Subforms page (initial instructions page immediately following CDE forms) for instructions on how to update the status of each previously-reported structured faculty development program.

*Reference:* Refer to the glossary for a definition of each type of faculty development activity.

To Complete the Form: Click on "Save and Validate" on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Individual-level Data—INDGEN Subforms

INDGEN - Introduction

Notice to Grantees about Individual-level Data:

- You must complete an INDGEN record for each individual who received a BHW-funded financial award during the annual reporting period. In addition, annual updates are required for individuals who were previously reported on INDGEN and were not marked as having graduated, completed or attrited from their training program by July 01, 2017 - June 30, 2018.

- For prior records, the BPMH system will prepopulate certain blocks in the INDGEN subform with data submitted in previous reporting periods for each individual. All other fields must be updated on an annual basis until the individual graduates from, completes, or permanently leaves their training program.

- The INDGEN subform will automatically calculate and display read-only columns labeled "Academic Year Total" and "Cumulative BHW Financial Award Total."
1. The Academic Year Total will display the amount entered for a given academic year.

2. The Cumulative BHW Financial Award Total will sum all amounts entered for this individual in the BMPH system.

   Individuals who were reported as having graduated from or completed their training program in the previous reporting period will automatically be transferred from INDGEN to the INDGEN-PY subform after one (1) full calendar year has passed from the moment of graduation/completion. At that point, 1-year post-graduation/completion employment status data must be provided for each individual.
Note: To view data submitted in previous reporting period, click on the "View Prior Period Data" link on top of the form.
### IND-GEN: Individual Characteristics

#### IND-GEN - Setup

| Do you have either a) individuals who received direct financial support (e.g., scholarships, stipends, loans, loan repayment) from a HRSA-funded grant OR b) updates to provide for individuals who received direct financial support in a previous reporting period? | Yes (complete IND-GEN)  No (click Save and Validate button to proceed to the next form) |

**Figure 4. IND-GEN - Setup**

**Warning:** If you have used the INDGEN form before, this answer is pre-selected ‘Yes’ for you. You do not need to answer this question again. Please move ahead to the INDGEN form by using the form list located on the left side of your screen.

**Warning:** If you are unable to enter data into the INDGEN form, edit prior records, or see drop-down menus despite the question above being answered ‘Yes’, you have a browser compatibility problem. Please refer to the Getting Started-Browser Settings page at the beginning of this manual.

**Warning:** Gray fields in prior records cannot be edited.

**Warning:** Prior records cannot be deleted.
IND-GEN - Entering Trainee Unique ID

**Trainee Unique ID:** Enter a seven (7) alphanumeric unique identifier for each individual in the textbox in Column 2 (Block 1).

**Warning:** It is the responsibility of each grantee to keep a log of all unique IDs used, as these will be required to provide annual updates and 1-year follow-up data for each individual.

**Note:** This column will prepopulate for prior records with data submitted in previous reporting periods. Prior data cannot be altered or deleted.
IND-GEN - Selecting Individual's Training or Awardee Category

Select Individual's Training or Awardee Category: Select each individual's training category by clicking on the drop-down menu in Column 3 (Block 2) and choosing one of the following options:

- Faculty
- Fellow

Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior data cannot be altered or deleted.
IND-GEN - Selecting Highest Degree Held by Individual

**Select Highest Degree Held by Individual**: Select the highest degree held by each individual by clicking the on the drop-down menu in Column 3b and selecting one of the following options:

- DDS
- DO
- MMSc
- PharmD
- Doctoral Degree (not otherwise specified)
- DMD
- MD
- MPAS
- PhD
- DNP
- MHS
- MSN
- PsyD
IND-GEN - Selecting Individual's Enrollment/Employment Status

Figure 8. IND-GEN - Selecting Individual's Enrollment/Employment Status

Select Individual's Enrollment / Employment Status: Select each individual’s current enrollment or employment status in the program by clicking on the drop-down menu in Column 4 (Block 3) and choosing one of the following options:

- Both Full-time and Part-time
- Full-time
- Part-time
- On leave of absence
- Inactive
IND-GEN - Selecting Individual's Gender

Select Individual's Gender: Select each individual’s gender by clicking on the drop-down menu in Column 5 (Block 4) and choosing one of the following options:

- Female
- Male
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior data cannot be altered or deleted.
IND-GEN - Entering Year of Birth

Enter Year of Birth: Select each individual's age by clicking on the drop-down menu in Column 6a.

- 1917
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Health Resources and Services Administration
Bureau of Health Workforce

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- 2017
- 1985
- 1988
- 1991
- 1994
- 1997
- 2000
- 2003
- 2006
- 2009
- 2012
- 2015
- Not Reported
IND-GEN - Selecting Individual's Ethnicity

Select Individual's Ethnicity: Select each individual’s ethnicity by clicking on the drop-down menu in Column 7 (Block 8) and choosing one of the following options:

- Hispanic/Latino
- Non-Hispanic/Non-Latino
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior records cannot be altered or deleted.
IND-GEN - Selecting Individual's Race

Select Individual's Race: Select each individual’s race by clicking on the drop-down menu in Column 8 (Block 7) and choosing all that apply from the available options. You may select more than one option for individuals of multiple races:

- American Indian or Alaska Native
- Black or African-American
- White
- Asian
- Native Hawaiian or Other Pacific Islander
- Not Reported

⚠️ Warning: You may not select ”Not Reported” in combination with any other option. In addition, the 'Not Reported' option may not be selected for prior records.

💡 Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior records cannot be altered or deleted.
IND-GEN - Selecting if Individual is from a Rural Residential Background

Select Whether Individual is from a Rural Residential Background: Select whether each individual is from a rural residential background by clicking on the drop-down menu in Column 9 (Block 8) and choosing one of the following options:

- Yes
- No
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

Reference: Refer to the glossary for a definition of "rural setting."
IND-GEN - Selecting if Individual is from a Disadvantaged Background

Select Whether Individual is from a Disadvantaged Background: Select whether each individual is from a disadvantaged background by clicking on the drop-down menu in Column 10 (Block 9) and choosing one of the following options:

- Yes
- No
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior data cannot be altered or deleted.

Reference: Refer to the glossary for a definition of "disadvantaged background."
IND-GEN - Selecting Individual's Veteran Status

Select Individual's Veteran Status: Select each individual's current veteran status by clicking on the drop-down menu in Column 11 (Block 10) and choosing one of the following options:

- Active Duty Military
- Reservist
- Veteran - Retired
- Individual is not a Veteran
- Veteran - Prior Service
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in previous reporting periods. Prior records cannot be altered or deleted.

Reference: Refer to the glossary for a definition of the various types of veteran statuses.
### IND-GEN - Entering BHW-Funded Financial Award Information

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Whether Individual Received BHW Financial Award?</th>
<th>Enter Individual's Financial Award Amount (BHW funds only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(12) Block 11</td>
<td>Stipend</td>
</tr>
<tr>
<td>(13) Block 11</td>
<td></td>
</tr>
<tr>
<td>(14) Block 11</td>
<td></td>
</tr>
<tr>
<td>(20) Block 11</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 16. IND-GEN - Entering BHW-Funded Financial Award Information**

**Select Whether Individual Received BHW Financial Award?:** Select whether each individual received a BHW-funded financial award during the current reporting period by clicking on the drop-down menu in Column 12 (Block 11) and choosing one of the available options. If the individual did not receive a financial award, select “No,” and enter “0” in all financial award columns where no money was disbursed.

- Yes
- No

**Enter Individual's Financial Award Amount (BHW funds only): Stipend:**

- If the individual is a fellow, faculty, or community provider and received a BHW-funded financial award (Stipend), enter the total amount of BHW dollars provided during the current reporting period in the textbox under Stipend in Column 13 (Block 11).
- If the individual did not receive a Stipend, enter "0".

**Enter Individual's Financial Award Amount (BHW funds only): Traineeship:**

- If the individual is a fellow, faculty, or community provider and received a BHW-funded financial award (Traineeship), enter the total amount of BHW dollars provided during the current reporting period in the textbox under Traineeship in Column 14 (Block 11).
- If the individual did not receive a Traineeship, enter "0".

Enter Individual's Financial Award Amount (BHW funds only): Fellowship:

- If the individual is a fellow, faculty, or community provider and received a BHW-funded financial award (Fellowship), enter the total amount of BHW dollars provided during the current reporting period in the textbox under Fellowship in Column 20 (Block 11).
- If the individual did not receive a Fellowship, enter "0".
IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

<table>
<thead>
<tr>
<th>Enter # of Academic Years the Individual has Received BHW Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>(22)</td>
</tr>
<tr>
<td>Block 12</td>
</tr>
</tbody>
</table>

**Figure 17. IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding**

**Enter # of Academic Years the Individual has Received BHW Funding:** Select the cumulative number of academic years that each student has received a BHW-funded financial award by clicking on the drop-down menu under Column 22 and choosing one of the following options:

- 0
- 1
- 2
- 3
- 4
- 5 or more

**Note:** The number of academic years receiving BHW-funded financial awards does not need to be consecutive; rather, the cumulative total number of years should be reported.

**Note:** If an individual has received money for ½ an academic year, please round up to the nearest whole number. (e.g., if an individual has received a financial award for 1 ½ years, please enter 2 in Column 22).

**Note:** If an individual received a BHW-funded financial award for the first time during the current reporting period, select "1" in Column 22.
IND-GEN - Selecting Individual's Academic or Training Year

Select Individual's Academic or Training Year: Select each student's current training year by clicking on the drop-down menu under Block 15 and choosing one of the following options:

- Faculty
- Fellowship Year 2
- Non-degree Training Program Year 2
- Fellowship Year 1
- Fellowship Year 3
- Non-degree Training Year 1

Note: For faculty or preceptors, select N/A.
IND-GEN - Selecting any HHS Priority Topic Area on which an Individual Received Training

Select any HHS Priority Topic Area on which an Individual Received Training: Use the dropdown menu in Column 26b to select all that apply from the list of topic areas on which the individual was trained.

- Individual received a SAMHSA waiver to prescribe medication assisted treatment (MAT)
- Individual received training in opioid use treatment
- Individual received training in telehealth
- Individual received training in medication assisted treatment (MAT) for SUD/OUD
- Individual received training in substance use treatment
- None of the above
Select Individual's Primary Discipline: Select each individual's profession/discipline by clicking on the drop-down menu in Column 27 (Block 16) and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- Medicine - Urology
- Nursing - Public health nurse
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Administration
- Behavioral Health - Clinical Social Work
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Behavioral Health - Other Psychology
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Medicine - Thoracic Surgery - Integrated
- Nursing - Other
Health Resources and Services Administration
Bureau of Health Workforce

- Public Health - Injury Control & Prevention
- Public Health - Other

- Nursing - Researcher/Scientist
- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Maternal and Child Health
- Public Health - Social & Behavioral Sciences
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Infectious Disease Control
- Public Health - Nutrition

Note: **This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.**
IND-GEN - Entering Training Information in a Primary Care Setting

<table>
<thead>
<tr>
<th>Training in a Primary Care Setting</th>
<th>Select Whether Individual Received Training</th>
<th>Enter # of Contact Hours</th>
<th>Enter # of Patient Encounters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(28) Block 17</td>
<td>(29) Block 17a</td>
<td>(30) Block 17b</td>
</tr>
</tbody>
</table>

Figure 21. IND-GEN - Entering Training Information in a Primary Care Setting

**Training in a Primary Care Setting: Select Whether Individual Received Training:** Select whether each individual received clinical or experiential training in a primary care setting during the current reporting period by clicking on the drop-down menu in Column 28 (Block 17) and choosing one of the following options:

- Yes
- No
- N/A

**Training in a Primary Care Setting: Enter # of Contact Hours:**

- **If the individual received clinical or experiential training in a primary care setting,** enter the total number of hours spent in this type of setting during the current reporting period in the textbox in Column 29 (Block 17a).
- **If the individual did not receive clinical or experiential training in a primary care setting,** leave the textbox in Column 29 (Block 17a) blank.

**Training in a Primary Care Setting: Enter # of Patient Encounters:**

- **If the individual received clinical or experiential training in a primary care setting,** enter the total number of patient encounters in this type of setting during the current reporting period in the textbox in Column 30 (Block 17b).
• If the individual did not receive clinical or experiential training in a primary care setting, leave the textbox in Column 30 (Block 17b) blank.

⚠️ Warning: Select "N/A" in the drop-down menu in Column 28 (Block 17) for faculty.
IND-GEN - Entering Training Information in a Medically Underserved Community

⚠ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Training in a Medically Underserved Community</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Whether Individual Received Training</td>
<td>Enter # of Contact Hours</td>
</tr>
<tr>
<td>(31) Block 18</td>
<td>(32) Block 18a</td>
</tr>
</tbody>
</table>

Figure 22. IND-GEN - Entering Training Information in a Medically Underserved Community

Training in a Medically Underserved Community: Select Whether Individual Received Training:

Select whether each individual received experiential training in a medically underserved community (MUC) during the annual reporting period by clicking on the drop-down menu under Column 31 and choosing one of the following options:

- Yes
- No
- N/A

Training in a Medically Underserved Community: Enter # of Contact Hours:

If the individual received clinical or experiential training in a MUC, enter the total number of hours spent in this type of setting during the current reporting period in the textbox in Column 31 (Block 18a). If the individual did not receive clinical or experiential training in a MUC, leave the textbox in Column 31 (Block 18a) blank.
IND-GEN - Entering Training Information in a Rural Area

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

![Figure 23. IND-GEN - Entering Training Information in a Rural Area](image)

Training in a Rural Area: Select Whether Individual Received Training:

Select whether each individual received experiential training in a rural area during the annual reporting period by clicking on the drop-down menu and choosing one of the following options:

- Yes
- No
- N/A

Training in a Rural Area: Enter # of Contact Hours:

- **If the individual received clinical or experiential training in a rural area**, enter the total number of hours spent in this type of setting during the current reporting period in the textbox.
- **If the individual did not receive clinical or experiential training in a rural area**, leave the textbox blank.
Select Whether Individual Left the Program Before Completion: Select whether each individual permanently left their training program or faculty development program before completion during the current reporting period by clicking on the drop-down menu in Column 36 (Block 21) and choosing one of the following options:

- Yes
- No
### IND-GEN - Entering Graduation/Completion Information

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Whether Individual Graduated/Completed the Program</th>
<th>Select Degree Earned</th>
<th>Select Individual's Post-Graduation/Completion Intentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>(37) Block 22</td>
<td>(38) Block 22a</td>
<td>(39) Block 22b</td>
</tr>
</tbody>
</table>

**Figure 25. IND-GEN - Entering Graduation/Completion Information**

**Select Whether Individual Graduated/Completed the Program:** Select whether each individual completed their training program during the current reporting period by clicking on the drop-down menu in Column 37 (Block 22) and choosing one of the following options:

- Yes
- No

**Select Degree Earned:**

- **If an individual graduated from their NRSA fellowship program during the current reporting period,** select any degree earned through the program by clicking on the drop-down menu in Column 38 (Block 22a) and choosing one of the available options.

- **If an individual did not graduate during the current reporting period or is a faculty member,** select "N/A" in Column 38 (Block 22a).

- **If the individual is a community provider who completed faculty development,** select "N/A" in Column 38 (Block 22a).

- Doctoral Degree Not Otherwise Specified
- MBA
- MPH
- MSC
- MA
- MEd
- MS
- MSCR
- Master's Degree Not Otherwise Specified
- MHA
- MS-CTS
- MSPH
Select Individual's Post-Graduation/Completion Intentions:

- Select the individual's training or employment intentions by clicking on the drop-down menu in Column 39 (Block 22b) and choosing from the available options.
- If an individual did not graduate during the current reporting period or is a faculty member, select "N/A" in Column 39 (Block 22b).
- If the individual is a community provider who completed faculty development, select all applicable options in Column 39 (Block 22b).

- Individual intends to conduct research
- Individual intends to practice in a primary care setting
- Individual intends to teach
- Not Reported

- Individual intends to practice in a medically underserved area
- Individual intends to practice in a rural area
- None of the above
- N/A

⚠️ Warning: For Column 39 (Block 22b), “None of the above” and “Not reported” cannot be selected in combination with any other option.
**IND-GEN - Entering the % FTE Individual Spent in Different Roles**

⚠️ **Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter the % FTE Individual Spent on the Following Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
</tr>
<tr>
<td>(40) Block 24a</td>
</tr>
</tbody>
</table>

**Figure 26. IND-GEN - Entering the % FTE Individual Spent in Different Roles**

**Enter the % FTE Individual Spent on the Following Roles: Research:** Enter the percentage of NRSA-funded time each faculty member spent in 'Research' during the current reporting period in Column 40 (Block 24a).

**Enter the % FTE Individual Spent on the Following Roles: Teaching:** Enter the percentage of NRSA-funded time each faculty member spent in 'Teaching' during the current reporting period in Column 41 (Block 24b).

**Enter the % FTE Individual Spent on the Following Roles: Administration:** Enter the percentage of NRSA-funded time each faculty member spent in 'Administration' during the current reporting period in Column 42 (Block 24c).

**Enter the % FTE Individual Spent on the Following Roles: Clinical:** Enter the percentage of NRSA-funded time each faculty member spent in 'Clinical' during the current reporting period in Column 43 (Block 24d).

💡 **Note:** Percentages across Columns 40-43 must sum to 100%.
**IND-GEN - Entering # of Articles Published**

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter # of Articles Published in Peer-Reviewed Journals:

<table>
<thead>
<tr>
<th>(44)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block 25</td>
</tr>
</tbody>
</table>

Figure 27. IND-GEN - Entering # of Articles Published

**Enter # of Articles Published in Peer-Reviewed Journals:** Enter the number of articles published by each individual in peer-reviewed journals during the current reporting period in the textbox in Column 44 (Block 25). You may count any articles that have been accepted and are currently “in press.”
### Enter # of Peer-Reviewed Conference Presentations

<table>
<thead>
<tr>
<th>(45)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block 26</td>
</tr>
</tbody>
</table>

**Figure 28. IND-GEN - Entering # of Peer-Reviewed Conference Presentations**

**Enter # of Peer-Reviewed Conference Presentations:** Enter the number of peer-reviewed conference presentations made by each individual during the current reporting period.
IND-GEN - Entering # of Grants Awarded by Type & Amount

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter # of Grants Awarded by Type and Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research(&lt;$100,000)</td>
</tr>
<tr>
<td>(46) Block 27</td>
</tr>
</tbody>
</table>

Figure 29. IND-GEN - Entering # of Grants Awarded by Type & Amount

Enter # of Grants Awarded by Type and Amount: Research (<$100,000): Enter the total number of awarded research grants under $100,000 achieved by the individual during the current reporting period in Column 46 (Block 27).

Enter # of Grants Awarded by Type and Amount: Research (>=$100,000): Enter the total number of awarded research grants greater than or equal to $100,000 achieved by the individual during the current reporting period in Column 47 (Block 27).

Enter # of Grants Awarded by Type and Amount: Education (<$100,000): Enter the total number of awarded education grants under $100,000 achieved by the individual during the current reporting period in Column 48 (Block 27).

Enter # of Grants Awarded by Type and Amount: Education (>=$100,000): Enter the total number of awarded education grants greater than or equal to $100,000 achieved by the individual during the current reporting period in Column 49 (Block 27).

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
INDGEN-PY: Individual Prior Year

**INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion**

<table>
<thead>
<tr>
<th>Select whether status/employment data are available for the individual 1-year post graduation/completion</th>
<th>Select Individual's Current Training/Employment Status</th>
<th>Select Whether Your Organization Hired this Individual</th>
<th>Select Whether a Partner Organization Hired this Individual</th>
<th>Select Employment Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>(13) Block 23</td>
<td>(14) Block 23a</td>
<td>(16)</td>
<td>(17)</td>
<td>(18)</td>
</tr>
</tbody>
</table>

**Figure 30. INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion**

**Select whether status/employment data are available for the individual 1-year post graduation/completion:** Select whether current employment data are available for each fellow or faculty member who received a BHW-funded financial award and completed their fellowship one year prior to this report by clicking on the drop-down menu in Column 13 (Block 23) and choosing one of the following options:

- Yes
- No

**Select Individual's Current Training/Employment Status:**

Choose each former fellow’s current employment status by clicking on the drop-down menu in Column 14 (Block 23a) choosing all that apply from the available options. If employment data are not available, select "N/A" in Column 14.

- Individual currently practices in a medically underserved area
- Individual currently practices in a primary care setting
Health Resources and Services Administration
Bureau of Health Workforce

- Individual currently practices in a rural area
- Individual is currently teaching
- N/A

- Individual is currently conducting research
- None of the above

Select Whether Your Organization Hired this Individual: Select whether your organization hired this individual following training program completion by clicking on the drop-down menu in Column 16 and choosing one of the options below. If employment data are not available, select "N/A" in Column 16.
- No
- Yes
- N/A

Select Whether a Partner Organization Hired this Individual: Select whether a partner organization hired this individual following training program completion by clicking on the drop-down menu under Column 17 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”
- Yes
- No
- N/A

Select Employment Location:
Select the type of employment location where the individual was hired following training program completion by clicking on the drop-down menu under Column 18 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”
- Academic Institution
- Critical Access Hospital
- Other Clinical Training Site
- None of the Above
- Area Health Education Center
- FQHC or Look-Alike
- Rural Health Clinic
- N/A
Warning: “None of the above” and “N/A” cannot be selected in combination with any other option.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Course Development and Enhancement—CDE Subforms

CDE - Introduction

**Purpose of CDE forms:** The CDE forms are used to collect information about curriculum development and enhancement activities, including development status, delivery mode, course topic, etc. for courses offered during the current reporting period.

- CDE-1: Collects information about newly developed or enhanced courses offered during the current reporting period.
- CDE-2: Collects the number of individuals who participated in the CDE courses and training activities (grouped by course and primary discipline).

**Order of Forms:**
- The CDE forms MUST be completed in order, otherwise drop-down menus will not populate correctly.
- You must complete and click ‘Save and Validate’ in CDE-1 before proceeding to CDE-2.

**Pre-population of Prior Records:**
- The BPMH system will prepopulate saved information for each previously offered courses (i.e. “Prior Records”) in the CDE-1 data table.
- For “Prior Records” you must indicate whether the course was offered during the current reporting period.

**Creation of New Records:**
- The BPMH system will allow you to enter information for newly offered courses or training activities (i.e., “New Record”) in the CDE-1 data table. “New Records” will populate below all “Prior Records”
- For “New Records” you must indicate whether the course was offered during the current reporting period.

Detailed guidance on how to make the correct selections for the CDE forms can be found below.
CDE-1: Course Development and Enhancement - Course Information
CDE-1 - Setup

| Have you used BHW resources or received in-kind support to develop or enhance a course or other training activity associated with the grant? | Yes (complete CDE-1 and CDE-2) No (Click Save and Validate to proceed to the next form) |

Figure 31. CDE-1 - Setup

To begin providing data about courses and other training activities that have been developed or enhanced through the grantor to provide updates on previously reported activities, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.

⚠️ Warning: If you have used the CDE form before, this answer is pre-selected ‘Yes’ for you. You do not need to answer this question again. Please move ahead to the CDE form by using the form list located on the left side of your screen.
**CDE-1 - Entering the Name of Course/Training Activity**

*Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.*

<table>
<thead>
<tr>
<th>Name of Course or Training Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
</tr>
<tr>
<td>Block 1</td>
</tr>
</tbody>
</table>

Figure 32. CDE-1 - Entering the Name of Course/Training Activity

**Name of Course or Training Activity:**

Enter the name of each course or training activity that was developed or enhanced through the grant at any point during the entire project period. All previously reported courses will be saved in the data table from your past performance reports and labeled as “Prior Records.” To report on a NEW course, enter the course name in the “Add Course” box at the top of your screen. Click ‘Add Record’ after each entry and the new courses will appear at the bottom of the data table below, in column 1. Repeat this process to enter each course or training activity that was developed or enhanced through the grant separately.

*Warning: Complete the CDE-1 Setup form only if grant funds were used to develop or enhance NEW courses or training activities other than those previously reported.*
CDE-1 - Selecting Type of Course or Training Activity

Select Type of Course or Training Activity: Select the type of course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu in Column 2 (Block 2) and choosing one of the following options:

- Academic course
- Clinical rotation
- Faculty development programs or activities
- Field placement/practicum
- Grand rounds
### CDE-1 - Selecting whether Course was Newly Developed or Enhanced

<table>
<thead>
<tr>
<th>Select whether Course or Training Activity was Newly Developed or Enhanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3)</td>
</tr>
<tr>
<td>Block 3</td>
</tr>
</tbody>
</table>

Figure 34. CDE-1 - Selecting whether Course was Newly Developed or Enhanced

**Select whether Course or Training Activity was Newly Developed or Enhanced:** Select whether each course or training activity identified under Column 1 (Block 1) was newly developed or was enhanced by clicking on the drop-down menu in Column 3 (Block 3) and choosing one of the following options:

- Enhanced
- Newly developed

**Note:** Select 'Newly Developed' for courses or training activities that were not in existence and were developed in their entirety through the grant.

**Note:** Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.
CDE-1 - Entering Development/Enhancement Status

警告：此部分需要多步骤完成，请仔细阅读说明。

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Status of Development or Enhancements</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4)</td>
</tr>
<tr>
<td>Block 4</td>
</tr>
</tbody>
</table>

图35. CDE-1 - Entering Development/Enhancement Status

Select Status of Development or Enhancements: 选择每门课程或培训活动的当前状态，通过点击对应列（第4列，Block 4）的下拉菜单，选择以下选项之一:

- Developed not yet implemented
- Implemented
- Under development
Select Delivery Mode Used to Offer this Course or Training Activity: Select the primary mode used to deliver each course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu in Column 8 (Block 6) and choosing one of the following options:

- Classroom-based
- Clinical Rotation
- Grand rounds
- Simulation-based Training
- Distance learning (Online Webinar)
- Experiential/Field-based
- Hybrid

Figure 36. CDE-1 - Selecting Delivery Mode
Select Primary Topic Area: Select the primary topic area for each course or training activity that was developed or enhanced by clicking on the drop-down menu under Column 11 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed

- Behavioral Health - Substance Abuse - General
- Behavioral Health - Treatment
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural

- Behavioral Health - Substance Abuse - Opioids
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
Note: Clinical Training - Public health incorporates the following topic areas: health promotion and disease prevention, health policy/advocacy, emergency preparedness and response, environmental health, nutrition, epidemiology, and data collection and analysis. Clinical Training - Technology - Other incorporates the following topic areas: telemedicine, informatics, and electronic medical records.
Select Whether the Course or Training Activity was Offered in the Current Reporting Period:

Select whether the course or training activity that was developed or enhanced was offered, re-offered or not offered in the current reporting period by clicking on the drop-down menu under Column 12 and selecting one of the options below:

- Offered
- Not Offered
- Re-offered

Note: Information on courses that were ‘Offered’ or ‘Re-offered’ will carry over onto the CDE-2 form.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
CDE-2: Course Development and Enhancement - Trainees by Profession/Discipline
CDE-2 - Adding Courses and Profession/Disciplines

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Name of Course or Training Activity</th>
<th>Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Block 1</td>
<td>(2) Block 7</td>
</tr>
</tbody>
</table>

Figure 39. CDE-2 - Adding Courses and Profession/Disciplines

Name of Course or Training Activity:

Begin by selecting the name of the course or training activity from the dropdown menu at the top of the screen. Available course names will prepopulate from the CDE-1 form. Only the names of courses that were marked as "Offered" or “Re-offered” from CDE-1 form will appear as options in the drop-down menu.

Profession and Discipline of Individuals Trained: Select the profession(s) and discipline(s) of individuals trained through each course offered (or re-offered) during the current reporting period by choosing all that apply from the options listed below. Click on the "Add Record" button to save your entry. Repeat this process to capture the profession and discipline of all individuals trained in each course or training activity during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
<table>
<thead>
<tr>
<th>Profession/Field</th>
<th>Code 2017</th>
<th>Code 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dentistry - General Dentistry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Dental Hygiene/Public Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Public Health Dentistry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Aerospace Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Colon and Rectal Surgery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Family Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Integrative Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Internal Medicine/Pediatrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Neurology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Occupational Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Pediatrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Plastic Surgery - Integrated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Preventive Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/Public Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Radiation Oncology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Thoracic Surgery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Vascular Surgery - Integrated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Geropsychiatric</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Psychiatric/Mental health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Licensed practical/vocational nurse (LPN/LVN)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Adult gerontology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Emergency care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Geropsychiatric</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Women's health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Pathology Dentistry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Periodontic Dentistry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - General Dentistry/Public Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Allergy and Immunology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Dermatology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Geriatric Psychiatry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Internal Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Medical Genetics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Nuclear Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Ophthalmology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Otolaryngology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Physical Medicine and Rehabilitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Preventive Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/Public Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Radiology - Diagnostic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Thoracic Surgery - Integrated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Adult gerontology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Neonatal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Women's health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Acute care adult gerontology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Adult Psychiatric/Mental health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Family</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Neonatal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse administrator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse informaticist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Registered Nurse</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Chiropractic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentistry - Prosthodontic Dentistry</td>
<td></td>
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<tr>
<td>Dentistry - Radiology Dentistry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Anesthesiology</td>
<td></td>
<td></td>
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<tr>
<td>Medicine - Emergency Medicine</td>
<td></td>
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<tr>
<td>Medicine - Geriatrics</td>
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<tr>
<td>Medicine - Internal Medicine/Family Medicine</td>
<td></td>
<td></td>
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<tr>
<td>Medicine - Neurological Surgery</td>
<td></td>
<td></td>
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<tr>
<td>Medicine - Obstetrics and Gynecology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Orthopaedic Surgery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Pathology - Anatomical and Clinical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Plastic Surgery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/Family Medicine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Psychiatry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Surgery - General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicine - Urology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Family</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Pediatrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Home Health Aide</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Acute care pediatric</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Child/Adolescent Psychiatric/Mental Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Family Psychiatric/Mental Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Pediatrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse anesthetist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse midwife</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing - Researcher/Scientist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Community Health Worker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - First Responder/EMT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Lay and Family Caregiver</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Midwife</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Optometry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Profession Not Listed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other - Respiratory Therapy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Health Resources and Services Administration
Bureau of Health Workforce

- Nursing - Nurse educator
- Nursing - Public health nurse
- Other - Audiology
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Radiologic technology
- Other - Speech Pathology
- Other - Occupational Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Nutrition
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women's health
- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Health Informatics
- Student - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - NP - Acute care pediatric
- Student - NP - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Medical Laboratory Technology
- Other - Office/Support Staff
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Other - Physical Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Student - CNS - Family
- Student - CNS - Pediatrics
- Student - Dental Assistant
- Student - Diploma/Certificate
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Home Health Aide
- Student - Medical School
- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Physical Therapy
- Student - Registered nurse (RN)
- Student - Undergraduate - Public Health

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- Other - Veterinary Medicine
- Other - Speech Therapy
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Administration
- Public Health - Injury Control & Prevention
- Student - Alternative/Complementary Nursing
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Dental Hygiene
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Other Behavioral Health
- Student - Graduate - Social Work
- Student - Law School
- Student - NP - Acute care adult gerontology
- Student - NP - Adult Psychiatric/Mental health
- Student - NP - Family
- Student - NP - Neonatal
- Student - NP - Women's health
- Student - Physician Assistant
- Student - Registered Nurse - BSN
- Student - Dental Hygiene/Public Health
National Research Service Award in Primary Care

- Student - NP - Other advanced nurse specialists
- Student - Pharmacy School
- Student - Post - high school / Pre - college
- Student - Undergraduate - Other
- Student - Dental School/Public Health
CDE-2 - Entering # Trained in the Profession and Discipline

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter # Trained in this Profession and Discipline

| (3) |
| Block 7 |

Figure 40. CDE-2 - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline:

For each course, enter the number of participants from the professions/disciplines you have indicated under Column 3 (Block 7). Repeat this process to capture all the individuals trained in each course or training activity during the current reporting period. Once you have completed Columns 1 through 3 for all rows, click ‘Save and Validate’ to automatically populate Columns 4 through 9 with responses from CDE-1.

💡 Click save and validate to complete the form.
CDE-2 - Selecting Type of Course or Training Activity

Figure 41. CDE-2 - Selecting Type of Course or Training Activity

Select Type of Course or Training Activity:

Column 4 (Block 2), Type of Course or Training Activity will automatically populate with response from CDE-1 form.
Select whether Course or Training Activity was Newly Developed or Enhanced: Following the selection of whether the Course or Training Activity was Newly Developed or Enhanced in CDE-1, the Newly Developed or Enhanced course or Training Activity will be automatically populated when the save and validate button is selected.
**Select Delivery Mode Used to Offer this Course or Training Activity**

<table>
<thead>
<tr>
<th>(7) Block 6</th>
</tr>
</thead>
</table>

**Figure 43. CDE-2 - Selecting Delivery Mode**

Select Delivery Mode Used to Offer this Course or Training Activity:

Column 5 (Block 3), selection of whether the Course or Training Activity was Newly Developed or Enhanced will automatically populate with response from CDE-1 form.
**Select Primary Topic Area:**

Column 8, Primary Topic Area will automatically populate with response from CDE-1 form.
CDE-2 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

Select Whether the Course or Training Activity was Offered in the Current Reporting Period:

Column 9, selection of whether the course was offered will automatically populate with response from CDE-1 form.

💡 To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Faculty Development, Instruction, and Recruitment—FD Subforms

FD - Introduction

Purpose of FD forms:

- The FD-1 subforms collect information about the characteristics and the trainees of structured faculty development programs.
- The FD-2 subforms collect information about the characteristics and the trainees of faculty development activities.
- The FD-4 subforms collect information about the characteristics of faculty-instructed courses.

⚠️ Warning: The FD-1a and FD-1b subforms will only appear if "Structured Faculty Development Training Program" was selected in the Faculty Development Setup Form.

⚠️ Warning: The FD-2a and FD-2b subforms will only appear if "Faculty Development Training Activity" was selected in the Faculty Development Setup Form.

⚠️ Warning: The FD-4a and FD-4b subforms will only appear if "Faculty Instruction" was selected in the Faculty Development Setup Form.
FD-1a: Faculty Development - Structured Faculty Development Training Programs

FD-1a - Adding Structured Faculty Development Programs

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

**Program Name:** Enter the name of each new structured faculty development program coordinated and/or supported through the grant during the current reporting period. Next, click the "Add Record" button to save your entry. Repeat this process to enter each new structured faculty development program that was coordinated and/or supported through the grant during the current reporting period.

⚠️ Warning: If a previously-completed program (prior record) is being offered again with a new cohort, it will need to be re-created as a new record.

*Example:* The School of Medicine used BHW funds to support TeamSTEPPS training for ten (10) faculty members. In the first semester, the school used grant funds to pay for the costs of training three (3) faculty members. In the second semester, the school used grant funds to pay for the costs of training an additional seven (7) faculty members. Since each faculty development program supported through the grant must be reported separately, the School of Medicine would have 2 entries—TeamSTEPPS #1 and TeamSTEPPS #2 (names are for illustrative purposes only). The School of Medicine would complete the FD-1a and FD-1b subforms for each of these programs.
Select Program Status in the Current Reporting Period: Select the status of each structured faculty development program at the end of the current reporting period by clicking on the drop-down menu in Column 1a and choosing one of the following options:

- Complete
- Ongoing

Note: Select "Ongoing" if the training program did not conclude by the end of the current reporting period.

Note: Select "Complete" if the training program concluded at some point during the current reporting period.
FD-1a - Entering Program Information for Degree/Non-Degree Programs

<table>
<thead>
<tr>
<th>Select Whether this was a Degree Bearing Program</th>
<th>For Degree-bearing Programs</th>
<th>For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2) Block 2</td>
<td>(3) Block 2a</td>
<td>(5) Block 3</td>
</tr>
<tr>
<td></td>
<td>Select Type of Degree Offered</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Primary Focus Area</td>
<td></td>
</tr>
</tbody>
</table>

Figure 48. FD-1a - Entering Program Information for Degree/Non-Degree Programs

Select Whether this was a Degree Bearing Program: Select whether each structured faculty development program that was supported through the grant during the current reporting period culminates in awarding participants with a professional certificate or academic degree by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Yes
- No

For Degree-bearing Programs: Select Type of Degree Offered:

- If "Yes" was selected in Column 2 (Block 2), select the type of degree that participants will earn when completing each program by clicking on the drop-down menu in Column 3 (Block 2a) and choosing one of the available options.
- If "No" was selected in Column 2 (Block 2), select "N/A" in Column 3 (Block 2a).

- BA
- BS
- BSW
- DDS/MPH
- DMD
- DO
- BCHS
- Certificate
- DC
- DDS/MSPH
- DMD/MPH
- DO/DrPH
- BPH
- BSN
- DDS
- Diploma
- DDS/MSPH
- DMD/MPH
- DO/MPH
For Degree-bearing Programs: Select Primary Focus Area:

- **If "Yes" was selected in Column 2 (Block 2)**, select the primary focus of the degree-bearing structured faculty development program by clicking on the drop-down menu in Column 4 (Block 2b) and choosing one of the available options.
- **If "No" was selected in Column 2 (Block 2)**, select "N/A" in Column 4 (Block 2b).

- Business Administration
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Health Administration
- Public Health - Disease Prevention & Health Promotion
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Education
- Leadership
- Public Health - Environmental Health
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Education and Clinical Research
- Public Health - Biostatistics
- Public Health - Epidemiology

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Health Resources and Services Administration
Bureau of Health Workforce

- Public Health - Health Policy & Management
- Public Health - Maternal and Child Health
- Teaching
- Public Health - Infectious Disease Control
- Public Health - Nutrition
- Other Focus Area
- Public Health - Injury Control & Prevention
- Public Health - Social & Behavioral Sciences
- N/A

For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours:

- If "Yes" was selected in Column 2 (Block 2), enter zero ("0") in Column 5 (Block 3).
- If "No" was selected in Column 2 (Block 2), enter the length of each non-degree bearing structured faculty development program in clock hours in the textbox in Column 5 (Block 3).
FD-1a - Entering % of Time Spent Developing Competencies in Different Roles

Enter the % of Time Spent Developing Competencies for the Following Roles:

<table>
<thead>
<tr>
<th>Role</th>
<th>Column</th>
<th>Block</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinician</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Administrator</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Educator</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Researcher</td>
<td>9</td>
<td>5</td>
</tr>
</tbody>
</table>

Figure 49. FD-1a - Entering % of Time Spent Developing Competencies in Different Roles

**Enter the % of Time Spent Developing Competencies for the Following Roles: Clinician:** Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Clinician' in Column 6 (Block 5).

**Enter the % of Time Spent Developing Competencies for the Following Roles: Administrator:** Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Administrator' in Column 7 (Block 5).

**Enter the % of Time Spent Developing Competencies for the Following Roles: Educator:** Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Educator' in Column 8 (Block 5).

**Enter the % of Time Spent Developing Competencies for the Following Roles: Researcher:** Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Researcher' in Column 9 (Block 5).

**Note:** Percentages of time spent across the four roles must sum up to 100%.
FD-1a - Entering # of Faculty Who Completed the Program

Enter # of Faculty Who Completed the Program

(10)
Block 6

Figure 50. FD-1a - Entering # of Faculty Who Completed the Program

Enter # of Faculty Who Completed the Program:

- If you marked a program as "Complete" in Block 1a, enter the number of individuals who completed each structured faculty development program during the current reporting period in the textbox in Column 10 (Block 6).
- If you selected "Ongoing" in Block 1a, enter a zero ("0") in the textbox in Column 10 (Block 6).
Select whether any Faculty Received any type of BHW-Funded Financial Award during the Training Program

(11)
Block 7

Figure 51. FD-1a - Selecting whether Faculty Received BHW-Funded Financial Award

Select whether any Faculty Received any type of BHW-Funded Financial Award during the Training Program: Select whether any individual who participated in a structured faculty development program received any type of BHW-funded financial award by clicking on the drop-down menu in Column 11 (Block 7) and choosing from the following options:

- Yes
- No

Warning: You must complete an INDGEN subform for each individual who received a BHW-funded financial award during the current reporting period for participating in a structured faculty development program.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-1b: Faculty Development - Faculty Trained By Profession/Discipline
FD-1b - Adding Profession and Discipline for Structured Programs

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Program Name: Select a program name by clicking on the drop-down menu next to "Program Name" and choosing one of the available options (available options will be those entered and saved in the FD-1a subform).

Profession and Discipline of Faculty Trained: Select the profession(s) and discipline(s) of all individuals who participated in each structured faculty development program during the current reporting period by choosing all that apply from the available options. Next, click on the "Add Record" button to save your entry. Repeat this process to capture the profession/discipline of all individuals who participated in each structured faculty development program during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work
- Substance Abuse/Addictions Counseling
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Family Medicine
- Nursing - NP - Family
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
National Research Service Award in Primary Care

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- Medicine - Other
- Medicine - Pediatrics
- Other - Direct Service Worker
- Other - Health Education Specialist
- Nursing - Other
- Medicine - Anesthesiology
- Other - Physical Therapy
- Other - Profession Not Listed
- Other - Unknown
- Public Health - Health Policy & Management
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Geropsychiatric
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Neonatal
- Other - Health Informatics/Health Information Technology
- Nursing - NP - Acute care pediatric
- Other - Speech Therapy
- Nursing - Nurse midwife

- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Aerospace Medicine
- Medicine - Medical Genetics
- Other - Occupational Therapy
- Other - Pharmacy
- Medicine - Obstetrics and Gynecology
- Medicine - Occupational Medicine
- Physician Assistant
- Public Health - Nutrition
- Medicine - Preventive Medicine/Family Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- Medicine - Plastic Surgery - Integrated
- Nursing - NP - Emergency care
- Medicine - Radiation Oncology
- Medicine - Radiology - Diagnostic

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- Medicine - Geriatrics
- Medicine - Integrative Medicine
- Other - Community Health Worker
- Medicine - Preventive Medicine
- Medicine - Psychiatry
- Medicine - Allergy and Immunology
- Other - Office/Support Staff
- Medicine - Colon and Rectal Surgery
- Medicine - Dermatology
- Other - Registered Dietician
- Public Health - Health Administration
- Public Health - Other
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Adult
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Other - Facility Administrator

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<table>
<thead>
<tr>
<th>Health Resources and Services Administration</th>
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<tbody>
<tr>
<td>Bureau of Health Workforce</td>
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<tr>
<td>• Other - Chiropractic</td>
</tr>
<tr>
<td>• Other - Midwife</td>
</tr>
<tr>
<td>• Other - Speech Pathology</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Performance Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year 2017-2018</td>
</tr>
<tr>
<td>• Nursing - CNS - Pediatrics</td>
</tr>
<tr>
<td>• Other - Optometry</td>
</tr>
<tr>
<td>• Other - Respiratory Therapy</td>
</tr>
<tr>
<td>• Nursing - NP - Pediatrics</td>
</tr>
<tr>
<td>• Other - Audiology</td>
</tr>
<tr>
<td>• Other - Medical Laboratory Technology</td>
</tr>
<tr>
<td>• Other - Radiologic technology</td>
</tr>
</tbody>
</table>

| National Research Service Award in Primary Care |
FD-1b - Entering # Trained in the Profession and Discipline

Figure 53. FD-1b - Entering # Trained in the Profession and Discipline

**Enter # Trained in this Profession and Discipline:** For each structured faculty development program, enter the number of individuals in each profession/discipline who participated in the program during the current reporting period in the textbox in Column 3 (Block 4). Repeat this step as many times as necessary to capture the total number of individuals by profession/discipline who participated in each program.

💡 **To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-2a: Faculty Development - Faculty Development Activities
FD-2a - Entering Faculty Development Activities

⚠ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

![Activity Name Table]

Figure 54. FD-2a - Entering Faculty Development Activities

**Activity Name:** Enter the name of each faculty development activity coordinated and/or supported through the grant during the current reporting period. Select "Add Record" to save your entry. Repeat this process to enter each faculty development activity coordinated and/or supported through the grant during the current reporting period.

⚠ Warning: If a previously-completed faculty development activity (prior record) is being offered again with a new cohort, it will need to be re-created as a new record.

**Example:** The School of Medicine used BHW funds to pay for the cost of sending five (5) fellow and faculty members to the annual Academy Health conference. In addition, the school also used BHW funds to pay for the cost of sending two (2) faculty members to a local workshop on the integration of behavioral health and primary care. Since each faculty development activity supported through the grant must be reported separately, the School of Medicine would have 2 entries—one entry for the Academy Health Annual Conference and one for the Integration of Behavioral Health and Primary Care workshop (names are for illustrative purposes only). The School of Medicine would complete the FD-2a and FD-2b subforms for each of these activities.
FD-2a - Selecting Type of Faculty Development Activity Offered

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Type of Faculty Development Activity Offered</th>
<th>For Courses or Workshops</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select Whether Activity is Accredited for Continuing Education Credit</td>
</tr>
<tr>
<td>(2) Block 8</td>
<td>(3) Block 8a</td>
</tr>
</tbody>
</table>

Figure 55. FD-2a - Selecting Type of Faculty Development Activity Offered

Select Type of Faculty Development Activity Offered: Select the type of faculty development activity supported and/or coordinated through the grant during the current reporting period by clicking on the drop-down menu in Column 2 (Block 8) and choosing one of the following options:

- Academic Course for Continuing Education
- Clinical Rotation for Continuing Education
- Grand Rounds for Continuing Education
- Professional Conference
- Training/Workshop for Continuing Education

For Courses or Workshops: Select Whether Activity is Accredited for Continuing Education Credit:

- For Academic Course and Trainings/Workshops for Continuing Education (as selected in Column 2, Block 8), select whether these activities are accredited for continuing education credit by clicking on the drop-down menu in Column 3 (Block 8a) and choosing one of the available options.
- For Clinical Rotations and Grand Rounds for Continuing Education (as selected in Column 2, Block 8), select "N/A" for Column 3 (Block 8a).
For Courses or Workshops: Select Whether Attendance was to Acquire or Maintain Professional Certification:

- For Academic Course and Trainings/Workshops for Continuing Education (as selected in Column 2, Block 8), select whether attendance by faculty was for the purposes of acquiring or maintaining professional certification by clicking on the drop-down menu in Column 4 (Block 8b) and choosing one of the available options.
- For Clinical Rotations and Grand Rounds for Continuing Education (as selected in Column 2, Block 8), select "N/A" for Column 4 (Block 8b).

- Yes
- No
- N/A
Enter Duration of Training Activity in Clock Hours

(5)
Block 9

Figure 56. FD-2a - Entering Duration of Training Activity

Enter Duration of Training Activity in Clock Hours: Enter the duration (in clock hours) of each faculty development activity in the textbox in Column 5 (Block 9).

💡 Note: For activities less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60. (e.g., a 15-minute course would entered as 15/60 = .25.)
FD-2a - Selecting Delivery Mode

Select Delivery Mode Used to Offer Training Activity

<table>
<thead>
<tr>
<th>Block 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>(6)</td>
</tr>
</tbody>
</table>

Figure 57. FD-2a - Selecting Delivery Mode

Select Delivery Mode Used to Offer Training Activity: Select the primary delivery mode used to offer each faculty development activity by clicking on the drop-down menu in Column 6 (Block 10) and choosing one of the following options:

- Classroom-based
- Distance learning (Online Webinar)
- Experiential/Field-based
- Clinical Rotation
- Hybrid
- Grand Rounds
FD-2a - Selecting Faculty Role(s)

Select the Faculty Role(s) Addressed at Training Activity: Select the faculty role(s) addressed in each faculty development activity by clicking on the drop-down menu in Column 7 (Block 11) and choosing all that apply from the following options:

- Administrator
- Clinician
- Educator
- Researcher

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-2b: Faculty Development - Faculty Trained By Profession/Discipline

FD-2b - Adding Profession and Discipline for Activities

<table>
<thead>
<tr>
<th>Activity Name</th>
<th>Profession and Discipline of Faculty Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(1)</td>
</tr>
<tr>
<td></td>
<td>(2) Block 12</td>
</tr>
</tbody>
</table>

Figure 59. FD-2b - Adding Profession and Discipline for Activities

**Activity Name:** Select an activity name by clicking on the drop-down menu next to "Activity Name" and choosing one of the available options (available options will be those entered and saved in the FD-2a subform).

**Profession and Discipline of Faculty Trained:** Select the profession(s) and discipline(s) of all individuals who participated in each faculty development activity during the current reporting period by choosing all that apply from the available options. Select "Add Record." Repeat this process to capture the professions and disciplines of all individuals who participated in each faculty development activity during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Family Medicine
- Nursing - NP - Family
- Medicine - Other
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Medicine - Geriatrics
- Medicine - Integrative Medicine

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- Medicine - Pediatrics
- Other - Direct Service Worker
- Other - Health Education Specialist
- Nursing - Other
- Medicine - Anesthesiology
- Other - Physical Therapy
- Other - Profession Not Listed
- Other - Unknown
- Public Health - Health Policy & Management
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Geropsychiatric
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Neonatal
- Other - Health Informatics/Health Information Technology
- Nursing - NP - Acute care pediatric
- Other - Speech Therapy
- Nursing - Nurse midwife
- Other - Chiropractic

- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Aerospace Medicine
- Medicine - Medical Genetics
- Other - Occupational Therapy
- Other - Pharmacy
- Medicine - Obstetrics and Gynecology
- Medicine - Occupational Medicine
- Physician Assistant
- Public Health - Nutrition
- Medicine - Preventive Medicine/Family Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- Medicine - Plastic Surgery - Integrated
- Nursing - NP - Emergency care
- Medicine - Radiation Oncology
- Medicine - Radiology - Diagnostic
- Medicine - Surgery - General

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- Other - Community Health Worker
- Medicine - Preventive Medicine
- Medicine - Psychiatry
- Medicine - Allergy and Immunology
- Other - Office/Support Staff
- Medicine - Colon and Rectal Surgery
- Medicine - Dermatology
- Other - Registered Dietician
- Public Health - Health Administration
- Public Health - Other
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Adult
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Psychiatry/Mental Health
- Nursing - NP - Women's health
- Nursing - Nurse anesthetist
- Medicine - Thoracic Surgery
- Medicine - Urology
- Other - Facility Administrator
- Nursing - CNS - Pediatrics
- Other - Optometry
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- Other - Midwife
- Other - Speech Pathology

- Medicine - Thoracic Surgery - Integrated
- Nursing - Researcher/Scientist
- Other - First Responder/EMT
- Other - Medical Assistant
- Other - Podiatry
- Nursing - NP - Neonatal
- Nursing - Public health nurse
- Other - Lay and Family Caregiver
- Other - Midwife (non - nurse)
- Other - Veterinary Medicine

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- Other - Respiratory Therapy
- Nursing - NP - Pediatrics
- Other - Audiology
- Other - Medical Laboratory Technology
- Other - Radiologic technology
Enter # Trained in this Profession and Discipline: Enter the number of individuals in each profession/discipline who participated in each faculty development activity during the current reporting period in the textbox in Column 3 (Block 12). Repeat this step as many times as necessary to capture the total number of individuals by profession/discipline who participated in each faculty development activity during the current reporting period.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next subform or click on the "Submit" button in the left hand side of the EHB to begin the submission process of your PRGCA.
FD-4a: Faculty Development - Faculty Instruction
FD-4a - Adding Faculty Instructional Activities

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Name of the Course or Workshop Offered by the Faculty

<table>
<thead>
<tr>
<th>Block 17</th>
</tr>
</thead>
</table>

Figure 61. FD-4a - Adding Faculty Instructional Activities

Name of the Course or Workshop Offered by the Faculty: Enter the name of an instructional activity offered during the current reporting period in the textbox next to "Enter the Name of the Course or Workshop Offered by the Faculty." Next, click on the "Add Record" button to save your entry. Repeat this process to capture all instructional activities during the current reporting period.

⚠️ Warning: Only complete the Setup for new instructional activities. The FD-4a subform will prepopulate the name of instructional activities previously reported. If no new instructional activities were offered other than those previously reported, skip to the next page.
FD-4a - Selecting Whether the Course was Offered in the Current Period

Select Whether the Course/Workshop was Offered in the Current Reporting Period: Select whether each instructional activity was offered during the current reporting period by clicking on the drop-down menu in Column 1a and choosing one of the following options:

- Yes
- No

⚠️ Warning: For new records, you must select "Yes" under Column 1a.

⚠️ Warning: If "Yes" is selected for a prior record, then the remaining Blocks in the FD-4a subform must be completed. If "No" is selected for a prior record, do not complete any other columns in the FD-4 subform.
Select the Content Area Of the Course or Workshop:

Select the content area of each instructional activity offered during the current reporting period by clicking on the drop-down menu in Column 2 (Block 18) and choosing one of the following options:

- Acute care
- Alcohol and substance misuse/prevention
- Alzheimer’s disease/dementia
- Asian Americans
- Behavioral assessment and consultation in primary care
- Bioterrorism/preparedness
- Cancer
- Clinical Practice Information
- Communications
- Community collaboration
- Computer - based instructions
- Cultural competence in nursing
- Delirium
- Diabetes
- Drug - resistant diseases
- Emergency preparedness
- Epidemiology
- Evidence - Based Practices
- Experiences
- Advocacy/health policy
- Alternative/complementary medicine
- Ambulatory care
- Asthma
- Behavioral health
- Border Health
- Chronic Disease
- Clinical preventive services
- Community - Based Care
- Community health nursing
- Consumers' rights
- Cultural Competencies
- Dementia
- Domestic Violence
- E - Learning technology
- Emergency training
- Ethics and confidentiality
- Evidence Based Medicine
- Extended care
- African - Americans
- Alzheimer's disease
- American Indian/Alaska Natives
- Basic restorative skills
- Behavioral interventions for primary care
- Border health activities
- Chronic disease management
- Communication Skills
- Community - based continuity of care
- Community needs assessment
- Crisis intervention
- Data collection and analysis
- Depression
- Domestic Violence/Interpersonal violence
- Elder abuse
- Environmental health
- Ethics/bioethics
- Evidence Based Medicine/Practice
- Financial planning and management (including budgeting)
- Focus groups
- Genomics
- Geriatrics
- Health care and older adults
- Health literacy
- Health Reform/Health Insurance Marketplaces
- Hepatitis
- HIV/AIDS and other infectious diseases
- Homeless
- Improving communication skills
- Informatics
- Interactive simulated case studies
- Interprofessional Education
- Leadership Training
- Long - Term Care
- Mannequin - based and patient simulators
- Medication basics
- Mental health
- Minority Health
- Needs - specific training
- Nursing leadership and management
- Obesity
- Other simulated or virtual methods
- Palliative care
- Perioperative care
- Physical activity/active lifestyles
- Primary care
- Program evaluation
- Project management
- Public health policy development
- Quality improvement and patient safety
- Research
- Food borne Disease
- Geriatric education for direct care providers
- Gerontological nursing
- Health Disparities
- Health promotion
- Healthy aging
- Hispanics
- Home health
- Homelessness
- Infection control
- Information Technology
- Interdisciplinary training
- Interprofessional integrated models of care
- Leadership/Management
- Long - term care nursing
- Maternal and child health
- Medications/drugs
- Mental health and older adults
- Minority health issues
- Negotiations
- Nutrition
- Oral health
- Pain management
- Pastoral/Spiritual Care
- Personal care skills
- Prescription drug abuse
- Professional development
- Program management
- Public health infrastructure
- Public health science
- Rehabilitation
- Genetics
- Geriatric medicine
- Grant writing
- Health information technology
- Health Promotion and disease prevention
- Heart disease
- HIV/AIDS
- Home health care
- Hypertension
- Influenza
- Injury prevention
- Interpersonal skills
- Interprofessional team training
- Lesbian/Gay/Bisexual/Transgender individuals
- Managed Care
- Medical economics
- Meeting facilitation
- Migrant health initiatives
- Native Hawaiian/Pacific Islander
- Nursing care for vulnerable populations
- Nutrition/healthy eating
- Other
- Palliative and end of life care
- Patient safety (medical errors)
- Pharmacology
- Prevention/Primary care
- Program design
- Program planning
- Public health law
- Quality Improvement
- Rehabilitation Therapies
- Secondary care Technology
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- Sexual health
- Social marketing
- Suicide
- Teledentistry
- Tertiary care
- Transitional care
- Urban health
- Veterans Health
- Women's health
- Workforce development

- Rural Health
- Sexually transmitted infections
- Stroke
- Survey design
- Telehealth
- Tobacco cessation
- Trauma
- Urgent care
- Violence
- Women's health issues
- Wound care

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- Skills - based training (including coalition building)
- Substance Abuse
- Sustainability
- Telemedicine/telehealth
- Training
- Tuberculosis
- Veteran Related
- Virtual simulation
- Worker and patient safety
Enter the Length of the Course or Workshop in Clock Hours

| (3) | Block 19 |

Figure 64. FD-4a - Entering Course/Workshop Length

**Enter the Length of the Course or Workshop in Clock Hours:** Enter the duration, in clock hours, of each instructional activity offered during the current reporting period in the textbox in Column 3 (Block 19).

- **Note:** For courses less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60 (e.g., a 15-minute course would entered as 15/60 = .25).
- **Note:** For instructional activities offered via distance learning, enter the intended duration of each activity in this Block.
- **Note:** This column will prepopulate for prior records with data submitted in the previous reporting period.
FD-4a - Entering # of Times the Course or Workshop was Offered

Figure 65. FD-4a - Entering # of Times the Course or Workshop was Offered

Enter # of Times the Course or Workshop was Offered: Enter the number of times each instructional activity was offered during the current reporting period in the textbox in Column 4 (Block 20).
FD-4a - Selecting Delivery Mode

Select the Delivery Mode Used to Offer the Course or Workshop: Select the delivery mode used to offer each instructional activity during the annual reporting period by clicking on the drop-down menu in Column 5 (Block 22) and choosing one of the following options:

- Classroom-based
- Clinical Rotation
- Hybrid
- Real-time/Live distance learning
- Archived/Self-paced distance learning
- Grand Rounds
- Other

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-4b: Faculty Development - Faculty Trained by Profession/Discipline

FD-4b - Adding Profession and Discipline for Faculty Instructional Activities

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Name of the Course or Workshop Offered by the Faculty</th>
<th>Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Block 17</td>
<td>(2) Block 21</td>
</tr>
</tbody>
</table>

Figure 67. FD-4b - Adding Profession and Discipline for Faculty Instructional Activities

**Name of the Course or Workshop Offered by the Faculty:** Select the name of the course of workshop offered by faculty by choosing one of the available options from the drop-down menu (available options will be those marked as “offered” in the FD-4a subform).

**Profession and Discipline of Individuals Trained:** Select profession(s) and discipline(s) of all individuals trained in each instructional activity offered during the current reporting period by choosing all that apply from the options listed below. Next, click on the "Add Record" button to save your entry. Repeat this process as necessary to identify the profession/discipline of all individuals trained in each instructional activity offered by during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - Geriatric Psychiatry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
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- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Primary Care
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Nursing - Midwife
- Nursing - NP - Adult
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractic
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Medical Laboratory Technology
- Other - Optometry
- Other - Profession Not Listed
- Other - Respiratory Therapy

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- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- Medicine - Urology
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - Home Health Aide
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Other
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Midwife (non - nurse)
- Other - Pharmacy
- Other - Radiologic technology
- Other - Speech Pathology
- Other - Occupational Therapy
- Physician Assistant

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- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Public Health - Other
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women's health
- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Home Health Aide
- Student - Medical School
- Student - NP - Acute care pediatric
- Student - NP - Family
- Student - NP - Other advanced nurse specialists
- Student - NP - Women's health
- Student - Post - high school / Pre - college
- Student - Undergraduate - Public Health

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FD-4b - Entering # Trained in the Profession and Discipline

Figure 68. FD-4b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline: Enter the number of individuals trained in each profession/discipline in Column 3 (Block 21).

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next subform or click on the “Submit” button in the left hand side of the EHB to begin the submission process of your PRGCA.
Printing Your Performance Report

- To print the entire performance report, expand the left side menu of your report and click the ‘Review’ link under the ‘Review and submit’ section. You will be directed to the Review page.
- Next, click the ‘Print All Forms’ button below the Resources section of the Review Page.

Figure 69. Screenshot of Printing Your Performance Report
Submitting Your Performance Report

1. To submit your performance report, expand the left side menu of your report and click the ‘Submit’ link under the ‘Review and submit’ section. You will be directed to the Submit Report. On the Submit Report page, ensure that the status of all forms is ‘Complete’ with a green check mark. Click the ‘Submit’ button on the bottom right corner of this page.

Figure 70. Screenshot of the Submit Report Page
2. After step 1, you will be directed to the Submit Report-Confirm page. On this page, check the box under the ‘Certification’ section and click the ‘Confirm’ button on the bottom right corner of your screen to submit your report to HRSA. You will receive a confirmation message on your next screen.

![Submit Report - Confirm](image)

Figure 71. Screenshot of the Submit Report - Confirm Page
Appendix A: Glossary

This glossary contains general definitions for terms that are used throughout the BPMH system. Some terms may be defined in multiple ways by different programs due to their authorizing statutes and/or the nature of training activities offered. If you are unsure about how to define a term that is central to your program, please refer to the authorizing statute, the Funding Opportunity Announcement and/or your Government Project Officer for clarification.

Active Duty Military is a person who is serving full-time duty in the Armed Forces, Regular or Reserve Corps of the Public Health Service, or National Oceanic and Atmospheric Administration other than active duty for training; or a cadet at the United States Military, Air Force, or Coast Guard Academy; or a midshipman at the United States Naval Academy.

Attrition is the act of permanently leaving a training program or training activity before completion. An individual is counted as having attrited if s/he leaves a training program or training activity for any reason before completing all training requirements. This does not include those who have taken a leave of absence from a training program/training activity.

BHW-funded financial awards are monies from a grant funded by BHW that are provided to an individual by a grantee institution or organization for the purposes of defraying costs associated with participation in a training program or training activity. The types and definitions of BHW-funded financial awards are listed below:

   Career Award: A financial award provided to current faculty for the purposes of facilitating professional growth and advancement in the academic setting.

   Fellowship: A financial award provided to a Fellow for the purposes of defraying costs associated with advanced training in a specific content area.

   Loan: A financial award provided to a student enrolled in a degree program at an educational institution for the purposes of defraying costs associated with that degree program. Loans must be repaid in accordance with terms specified in a promissory note.

   Loan Repayment: A financial award provided to an individual that is conditional on their agreement to provide specific types of services for a specified amount of time. Under this agreement, an individual may have part or all of their student loans paid off so long as they meet all specified requirements.

   Scholarship: A financial award provided to a student enrolled in a degree program at an educational institution for the sole purpose of covering expenses associated with tuition.

   Stipend: A financial award provided to an individual for the purposes of defraying costs associated with a training program or training activity.

   Traineeship: A financial award provided to a student enrolled in an advanced training program at an educational institution for the purposes of defraying costs associated with advanced training in a specific content area.
Campus-based degree program is a degree program that requires students to complete all academic coursework at the college or university campus.

Contact hours are the number of hours that an individual receives training in a specific setting.

Continuing education is a training activity or series of training activities offered to members of the current workforce who have already completed a training program in their profession. Continuing education sessions are offered to existing professionals and do not include students as primary participants.

Curriculum is the aggregate content of multiple learning activities offered by an organization in a specific topic area. Commonly, the term curriculum is used to describe the number and type of academic courses within a degree program. The term can also be used to describe the number and type of learning activities for faculty and other non-degree-bearing training programs.

Didactic training is the process of instruction between a designated faculty and an individual or group of individuals.

Direct financial support program is a type of grant that provides individuals, via grantee organizations, with a BHW-funded financial award to help defray costs associated with participation in a training program or training activity.

Disadvantaged background refers to a citizen, national, or a lawful permanent resident of the United States, the Commonwealths of Puerto Rico or the Marianas Islands, the U.S. Virgin Islands, Guam, American Samoa, the Trust Territory of the Pacific Islands, the Republic of Palau, the Republic of the Marshall Islands, or the Federated State of Micronesia who:

1. Comes from an environment that has inhibited them from obtaining the knowledge, skills, and abilities required to enroll in and graduate from a health professions or nursing school (Environmentally Disadvantaged);
   AND/OR
2. Comes from a family with an annual income below a level based on low-income thresholds established by the U.S. Census Bureau, adjusted annually for changes in the Consumer Price Index (Economically Disadvantaged). The Secretary defines a “low income family” for various health professions and nursing programs included in Titles III, VII and VIII of the Public Health Service Act as having an annual income that does not exceed 200 percent of the Department’s poverty guidelines. A family is a group of two or more individuals.

Enhanced course or other training activity is a specific type of training activity that was already in existence at the institution or organization and has been modified or restructured as part of the federal award.

Enrollee is an individual who is actively matriculated or registered in a training program or training activity. For the purposes of performance reporting, the training category of "enrollees" does not include graduates, program completers, fellows, or residents.
Ethnicity is the ethnic ancestry or origin of an individual or group of individuals. For the purposes of performance reporting, the Office of Management and Budget requires that ethnicity be classified as "Hispanic or Latino Origin" and "Non-Hispanic or Latino Origin". Individuals identifying as "Hispanic or Latino" are of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.

Experiential training is the process of instruction between a designated faculty and an individual or group of individuals that includes a component of direct work experience.

Faculty is an individual or group of individuals who are deemed qualified by an organization to provide instruction to others on a specific topic area.

Faculty development activity is generally a stand-alone single training activity provided to faculty for the purposes of additional training and/or faculty development. Faculty development activities may include conferences, workshops, or grand rounds and are not necessarily offered at the grantee institution or organization.

Faculty development program is a series of curriculum-based training activities that are provided to faculty over a specific amount of time for the purposes of additional training and/or faculty development. Structured faculty development programs can be degree bearing or certificate bearing and are not necessarily offered at the grantee institution or organization.

Faculty instruction are those courses, workshops, seminars, grand rounds or other training activities that are led by faculty for the purposes of providing training to other individuals (e.g., students, fellows, residents). Faculty instruction does not refer to training activities undertaken by faculty for the purposes of additional training or faculty development (see Structured Faculty Development Program and/or Unstructured Faculty Development Activity).

Federally Qualified Health Centers (FQHC) are public and private non-profit health care organizations that meet certain criteria under the Medicare and Medicaid Programs (respectively, Sections 1861(aa)(4) and 1905(l)(2)(B) of the Social Security Act and receive funds under the Health Center Program (Section 330 of the Public Health Service Act).

Fellowship is a training program that provides an individual or group of individuals (known as "fellows") with advanced training in a general content area. Fellows generally receive a financial award to help defray costs associated with advanced training (also referred to as a "fellowship").

Full-time refers to the number of days per week and/or months per year representing full-time effort at the applicant/recipient organization, as specified in organizational policy. For a student, it means one who is enrolled full time as defined by the organization. The organization’s policy must be applied consistently, regardless of the source of support.
Graduate is an individual who has completed all the requirements of a degree-bearing training program at an educational institution. (See "Program completer" for individuals who complete all requirements of a non-degree-bearing training program or training activity).

Hybrid degree program is a degree program that requires students to complete academic coursework both on campus and through distance learning.

Instructional hours are the duration of a training activity or training program in clock hours.

Infrastructure program is a type of grant designed to enhance the scope, quality, and opportunities for health professions training programs or training activities. Infrastructure programs do not provide individuals with any type of BHW-funded financial awards.

Internship is a type of training activity that can either be: a) a component of a degree-bearing program or b) entry-level employment that provides an individual with relevant workforce experience.

Interprofessional education is the process of learning among a group of individuals from two (2) or more professions.

Interprofessional practice is the provision of care or services to an individual or group of individuals by workers from two (2) or more professions.

Medically Underserved Community (MUC) is a geographic location or population of individuals that is eligible for designation by a state and/or the federal government as a health professions shortage area (HPSA), medically underserved area (MUA), and/or medically underserved population (MUP). These communities have limited access to primary health care services. The term MUC is an umbrella term that can be used to describe any location that meets one or more of the previously identified designations.

Multipurpose/Hybrid program is a type of grant that is designed to:

1. Provide individuals, via grantee organizations, with BHW-funded financial awards to help defray costs associated with health professions training;

2. Enhance the scope, quality, and opportunities for health professions training programs or training activities.

Newly developed course or other training activity is a specific type of training activity that was not previously in existence at the grantee institution or organization and was developed in its entirety as part of the grant project.

Online degree program is a degree program that requires students to complete all academic coursework through distance learning.

Partner/consortium is an organization or group of organizations that provide(s) resources and/or support to grantees for the implementation of training programs and/or training activities.
**Patient encounter** is a direct interaction between a designated caregiver and a patient for the purposes of health care.

**Practicum** is a type of experiential training activity. (See "Experiential training").

**Primary care** is the provision of integrated, accessible health services by clinicians who are accountable for addressing a large majority of personal health care needs, developing a sustained partnership with patients, and practicing in the context of family and community.

**Primary care setting** is a facility that is staffed with professionals who provide primary care. (See "Primary Care").

**Profession & discipline** identifies a general occupation (profession) and, where applicable, a type of specialty within that occupation (discipline).

**Program completer** is an individual who has completed all requirements for a non-degree bearing training program or training activity. (See "Graduate" for individuals who complete all requirements of a degree-bearing training program).

**Publication** is written material that has been submitted to and accepted by a publishing authority as part of a collection of related work.

**Race** is an individual's self-identified affiliation with one (1) or more of the following origins:

- **White** – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- **Black or African American** – A person having origins in any of the Black racial groups of Africa
- **American Indian or Alaska Native** – A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment
- **Asian** – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- **Native Hawaiian or Other Pacific Islander** – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands

**Reservist** is a member of the Armed Forces of the United States Reserve Component, including the Army National Guard of the United States, the Army Reserve, the Navy Reserve, the Marine Corps Reserve, the Air National Guard of the United States, the Air Force Reserve, or the Coast Guard Reserve.

**Residency** is a training program that provides an individual or group of individuals (known as "residents") with advanced clinical training in a specialty area.
Residential background is/are the type/s of location/s in which an individual has established residence.

Rural is a geographical area that is not part of a Metropolitan Statistical Area (MSA). Note: To determine whether a geographical area is considered rural, go to HRSA’s Office of Rural Health Policy.

Structured training program is a series of curriculum-based training activities that are provided to an individual or group of individuals over a specific period of time.

Trainee is an individual who participates in a training program or training activity.

Underrepresented Minority (URM) is an individual from a racial and/or ethnic group that is considered inadequately represented in a specific profession relative to the representation of that racial and/or ethnic group in the general population. Note: For the purposes of the health professions, BHW considers individuals who are from the following racial and ethnic backgrounds underrepresented:
- American Indian or Alaska Native
- Black or African American
- Native Hawaiian or Other Pacific Islander
- Hispanic (all races)

Unstructured faculty development activity is generally a stand-alone single training activity provided to faculty for the purpose(s) of additional training and/or faculty development. Unstructured faculty development activities may include conferences, workshops, or grand rounds and are not necessarily offered at or by the grantee institution or organization.

Unstructured training activity is generally a stand-alone single training activity that is not part of curriculum.

Veteran is any person who served in one (1) of the seven (7) uniformed services of the United States. The seven uniform services include: The United States Army, Navy, Air Force, Marines, Coast Guard, Public Health Service, and National Oceanic & Atmospheric Administration Commissioned Officers Corps.

Veteran - Prior Service is a person who served in an active uniformed service and was discharged or released therefrom under conditions other than dishonorable prior to reaching official retirement status.

Veteran - Retired is a person who served in an active uniformed service; was discharged or released therefrom under conditions other than dishonorable; and is entitled, under statute, to retired, retirement, or retainer pay.
Vulnerable populations are groups of individuals at higher risk for health disparities by virtue of their race or ethnicity, socio-economic status, geography, gender, age, disability status, or other risk factors associated with sex and gender.
Appendix B: FAQs

General FAQs

When is the due date for the performance report?
Performance reports are due by July 31, 2018 for all programs. No extensions will be granted beyond this date. Failure to submit a performance report by the due date may place your grant in a non-compliant status.

What dates does the performance report cover?
The performance report submitted by grantees should cover all activities conducted through the grant during the current reporting period July 01, 2017 - June 30, 2018.

Is it possible to change data entered incorrectly in a prior reporting period?
No. Data entered in a previous reporting period cannot be edited. It is important that grantees provide accurate data during each reporting period.

Where will grantees be able to locate the instruction manuals for the performance reports?
Grantees will be able to access their program-specific instruction manual through the EHB. In addition, the manuals will be posted on the BHW grants website at https://bhw.hrsa.gov/grants/reportonyourgrant.

Is there a way to look at the data forms required for my program without logging into EHB?
Yes. Grantees will be able to view a program-specific overview of the required performance measure forms on the BHW grants website at https://bhw.hrsa.gov/grants/reportonyourgrant.

Are reports from prior years stored in the EHBs?
Yes. Grantees can locate reports from prior reporting periods in EHB by using any of the following methods:
   a) Clicking the ‘view prior period data’ link within a form or under your Resources tab;
   b) Going into your grant folder and searching for previously completed reports; or
   c) Clicking on the “submissions” link in the left side navigation menu.

Will the information we are submitting in this reporting period be automatically used to populate the forms in the future?
Yes. Depending on the form, certain data fields will prepopulate for future reporting periods based on the data you enter when the record is initially created. For example, information reported on the EXP-1 and EXP-2 forms for training sites used will carry over each reporting period. Similarly, much of the information reported on the INDGEN form will also carry over each reporting period until the individual completes his/her specific training program or permanently leaves before completion.

Does this report allow us to submit any attachments?
No, you cannot add attachments to the performance report.

When specific data, such as "N/A" is required after completing a cell, can those cells populate automatically?
No, grantees are required to enter all data themselves due to Section 508 requirements.
FAQs about Technical Support & Assistance

Who do we contact if we need technical assistance entering data in EHB?
Grantees should contact HRSA’s Call Center for any questions related to the performance report. The Call Center can be reached via phone at 1-877-464-4772.

FAQs about the Training Program Setup forms

The wrong program name was entered last year. Going forward, should we list the correct name?
If the grantee changes the program name, all the previous years’ data will be reset (everything entered in the past will not reappear this year). The best course of action is to make a note in the comments field and leave the program name as-is.

FAQs about the Program Characteristics (PC) forms

Do I need to set up my training program again if it is being reused in the current reporting period?
No. If you previously reported on a training program, you do not need to set up the program again. All of your previously used training programs will be displayed in your training program setup menu with a record status of ‘Prior Record’ displayed.

What are the status options for the different types of programs?
Structured and Unstructured Training programs use program status options “Ongoing” or “Complete.” All other training programs (degree/certificate, internships, fellowships, 1-year retraining, practica/field placements, residencies) use the status options “Active” or “Inactive.”

In the PC forms, do we count all trainees in our program, regardless of the year of study; do we include full-time/part-time trainees, etc.?
Yes, as long as trainees are enrolled or participating in the training program identified in Column 1.

Are we required to report on trainees at our institution beyond those who are participating in HRSA-funded programs?
The PC tables capture information about the universe of trainees regardless of funding status at your school. This is the only form that collects this type of information in aggregate.

FAQs about the LR-1 through DV-3 forms

In the LR and DV tables, are the counts for graduates and/or program completers a subset of the total trainee number, or are they to be reported separately?
On the LR and DV forms, graduates and program completers are not reported as a subset of the current trainee total. Please report aggregate counts of trainees (e.g., enrollees, residents, and fellows) SEPARATELY from the aggregate counts of graduates or program completers.
Which address should we use to determine whether an individual is from a rural residential background?
The definition of rural residential background is based on whether an individual has ever lived in a rural area. Grantees may choose to use the address prior to matriculation or the institution's address.

FAQs about the INDGEN form

Where do we get the Trainee Unique ID?
Grantees are responsible for developing a unique ID for each individual for whom an INDGEN entry is required. Grantees must keep a log of these unique IDs in order to provide follow-up data through the BPMH system.

What are the characters of the 7-digit unique ID?
Each unique ID must be made up of 7 alphanumeric characters. Do not include any personally identifiable information in the ID (name, birthdate, SSN, etc.).

Are INDGEN records from the last reporting period stored in the EHB?
Yes; they will appear in the INDGEN table as 'Prior Records' until (a) the individual is marked as a graduate/program completer, or (b) the individual permanently discontinues participation in the training program.

Last year we created unique IDs in the INDGEN table. If any of those participants attend a new training cycle this year, should we use the same code for that participant?
The purpose of the Unique ID is to track an individual's training participation over time. If the same individual is simultaneously participating in multiple training programs, you should use the same unique ID. Note that each training program must also have a unique name. The same "unique ID-training program" combination cannot be present more than once.

What if an individual already listed on INDGEN did not receive a financial award during the reporting period?
If an individual from a prior record did not receive a financial award during the current reporting period, please indicate this under Column 12. The record will remain on INDGEN until this individual is marked as a graduate/program completer or permanently leaves the training program prior to completion.

Is reporting the underrepresented Asian distinction no longer included?
The definition of an underrepresented minority (URM) included in the instruction manuals specifically states that a URM is "is an individual from a racial and/or ethnic group that is considered inadequately represented in a specific profession relative to the numbers of that racial and/or ethnic group in the general population". While some professional or accrediting organizations collect detailed information on Asian subpopulations, data sources for the general population (i.e., the Census) do not. Therefore, it is not possible to determine that specific Asian subpopulations are underrepresented relative to the general population. Furthermore, federal agencies have been directed by the Office of Management and Budget to collect race/ethnicity data in a manner consistent with that used for the Census. As a result, all race and ethnicity categories displayed in the INDGEN sub-form are identical to those used in the Census.

Can we use our institution's definitions/standards for disadvantaged background?
The BHW definition of disadvantaged background is included in the glossary of each instruction manual. As long as an institution's definition or standard does not contradict the federal definition of disadvantaged, then grantees may choose to count individuals who have been deemed disadvantaged by the institution. Otherwise, you must use the definition for disadvantaged background located in your program manual glossary.
Do we report full time faculty who receive salary support for teaching or administrative responsibilities?
If the faculty member is already accounted for in the grant's personnel log, then do include this individual on the INDGEN table. If the faculty member who received financial support is not listed in the grant personnel log, then he/she should be reported on INDGEN.

Do conference registration fees count as financial support?
Yes, but only for non-project staff.

How do we find out an individual's family income?
The institution's financial aid office should have that information, as part of the required application for financial aid.

For veteran status, are we asking only for the trainee's status, or the trainee's family status (e.g. dependent of veteran, spouse of veteran, etc.)?
Only the trainee's status should be reported.

How is the academic year funding total calculated?
Once you have validated the form, the academic year total is automatically calculated in EHB as the sum of funding during the academic year.

How is the cumulative funding total calculated?
The cumulative funding total is automatically re-calculated each annual reporting period in EHB. This is the total of each annual amount that has been entered for the individual record either (a) across the life of the grant or (b) since the BPMH system has been in use, starting with Academic Year 2012-2013.

Can I cut and paste rows in the INDGEN table?
The cut and paste capability is currently set up at the row level, rather than individual data elements. After a row of data has been copied and pasted, edits will need to be made to individual cells using the dropdowns. Please note that the system does not accept data that has been cut and pasted from sources outside the report itself.

Do we include faculty or preceptors on this form?
If direct funds were given to the individuals AND the individuals were not already included in the grant application, then yes, include them on INDGEN. Otherwise, do not include them.

In INDGEN Column 13, Stipend, should we include salaries?
The individual's salary (unless it's paid by the grant) should not be included. However, the BHW funding should be included.

On the prior report we indicated that a trainee graduated when he had not. Because of that, he is not showing up on the current report. Can he be moved back to the INDGEN form?
If the individual moves to the INDGEN-PY form you can locate the record of the mislabeled graduate. Scroll all the way to the right, and use the link called "Move to INDGEN", which will allow you to reset that record back to the INDGEN table for continued reporting.

I submitted a report last year using the 'not reported' option for trainee demographics. Why am I getting an error this year?
FAQs about the INDGEN-PY form

How do I use the INDGEN-PY form?
One year after an INDGEN record is marked as a graduate/program completer, you will be asked to provide an update on the individual’s employment/enrollment status.

FAQs about the Experiential Training (EXP) forms

Which training sites do I need to report on this form? Is it all of the sites our program uses?
Grantees should report only on sites used to provide training to students, trainees, or faculty supported by the grant during the current reporting period.

Our hospital provides multiple training sites for our trainees. Do I list the hospital or the specific clinics and offices within the hospital?
You should list the specific clinics and offices within the hospital that provide training to supported trainees.

Do I need to list a site more than once on EXP-2?
For sites that provide training to students, trainees, and faculty from different training programs, the site should be listed on the form for each training program the grant sponsors.

How can I report interprofessional team-based care at the training sites?
Interprofessional team-based care reporting is a three-step process on the EXP-2 form. After identifying the training program and site, the first step is to select ALL of the professions and disciplines represented on the interprofessional team (including that of the principal HRSA-sponsored trainees). The second step is to provide the number of trainees (by discipline) who were trained by the HRSA-sponsored program (principal trainees). The final step is to provide the number of other trainees (by discipline) who participated at the site, alongside the principal trainees, but who were not enrolled in the HRSA-sponsored program.

What training sites do I report on EXP if I don’t have directly-funded individuals in INDGEN?
You should report all training sites used to train individuals touched by your grant funding. If no individuals are reported in INDGEN, consider those you reported on the LR-1 form.

The values I added in EXP-1 aren’t prepopulating in EXP-2. Why can I only see my active prior records?
You must select each program-site combination using the drop down menus in columns 1 and 2. The values you added in EXP-1 will load in the dropdown menu in EXP-2 column 2.

Why do I need to enter the zip code of my training sites?
The zip codes allow HRSA to identify sites that are in rural areas, medically underserved communities, and health professions shortage areas. Because the designation of each location may change over time, the zip code allows HRSA to adjust the way it labels a site.
FAQs about the Curriculum Development and Enhancement (CDE) forms

What if courses are created using a variety of funding sources?
Grantees should complete a CDE-1 entry for each course or training activity that was developed or enhanced using any amount of HRSA grant funds.

For CDE-2, do we report on all attendees or only those directly funded by a BHW-funded program for this reporting period?
For the purposes of the CDE-2 form, count all individuals trained (whether or not the individuals received direct financial support) through courses or training activities developed or enhanced using any BHW funds during the current reporting period.

In the CDE-1 table, I have entered a course that has been implemented, but when I try to select the site where the course was taught, I receive an error message that based on my responses for columns 2 and 4, this site is not allowed. Shall I use N/A as the site?
If it is an academic course or training/workshop for health professions students, fellows, or residents, then N/A will need to be used.

Can I delete a course from last year?
You will not be able to delete a previously used course. You may indicate that the course from last year was not used again this year.

FAQs about the Faculty Development (FD) forms

What is the difference between a structured faculty development program and an unstructured faculty development activity?
Structured and unstructured faculty development programs differ in a few ways. Generally, structured faculty development programs are administered over a longer period of time and involve multiple meetings/sessions. Additionally, structured programs tend to be curriculum-driven, and may lead to the conferral of a degree or certificate. In contrast, unstructured faculty development activities are shorter in duration and are single, stand-alone trainings. Faculty development activities include conferences, workshops, and grand rounds. What are the definitions for the roles of educator and administrator?
The educator role deals with instruction and training, course preparation, grading, and generally involves imparting knowledge or skills to others. Administrative responsibilities are support functions, such as committee work.

FAQs about the Continuing Education (CE) forms

For CE-2, do we report on all attendees or only those directly funded by a BHW-funded program for this reporting period?
Count all individuals trained (whether or not the individuals received direct financial support) through courses or training activities developed or enhanced using any BHW funds during the current reporting period. Individuals attending CE trainings should be current providers, rather than students.
In creating and enhancing courses for continuing education, what should the site be?
Enter N/A for these courses.

When should I use the ‘Other’ option for type of continuing education?

The ‘Other’ option is available if there was a CE activity that the grantee does not identify as an unstructured training or structured CE course. We anticipate that few (if any) grantees will need to use this option.