Instruction Manual for Grantees of the Nurse Faculty Loan Program

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 NFLP grant program:
   - To increase the number of qualified nursing faculty to facilitate education of the nurses needed to address the nursing workforce shortage.

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)
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](https://help.hrsa.gov/display/public/EHBSKBFG).
**Order of Required Forms**

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>Training Program</td>
</tr>
<tr>
<td>2</td>
<td>Performance Data Form</td>
<td>Program Characteristics-PC Subforms</td>
<td>PC-1</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>IND-GEN</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>INDGEN-PY</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>NFLP Subforms</td>
<td>NFLP-1</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>NFLP Subforms</td>
<td>NFLP-2</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>NFLP Subforms</td>
<td>NFLP-3</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>NFLP Subforms</td>
<td>NFLP-4</td>
</tr>
</tbody>
</table>
NFLP Subforms
NFLP Subforms - Introduction

General Instructions
(1) Activity that is prior to or beyond the specified report period timeframe should not be reported.
(2) An entry is required for all editable fields. Enter ‘0’ or ‘$0’ where applicable.
(3) Cumulative data fields are not editable. Data entered in the current data fields will auto-populate (update) the cumulative data fields.
(4) Pre-populated data and auto-populated data cannot be edited.
(5) Amounts entered on this form should be for the entire project period-July 1 to June 30.
(6) Negative amounts should not be entered.
Warning: Complete the Training Program Setup form only if grant funds were used to support degree programs other than those previously reported. You do not need to reenter information about degree programs previously reported. If no new degree programs were supported other than those previously reported, skip to the last step for this subform.

The Training Program Setup form will configure all subforms specific to the NFLP program. To begin the PRGCA, you must complete the training program setup form to identify the degree program(s) of students who received BHW-funded financial awards during the annual reporting period. REMINDER: Do not enter the degree program in the training setup form if there were no students in the program that received a financial award (NFLP loan disbursement) during the report period.

Select Type of Training Program Offered: To begin completing the setup form, select the type(s) of training program(s) supported through the grant during the annual reporting period by clicking on the drop-down menu next to “Select Type of Training Program Offered” and choosing one of the following options:

- Degree/Diploma/Certificate Academic Training Program (Degree/Diploma)

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
Training Program Setup - Loading Program Details

Figure 4. Training Program Setup - Loading Program Details

Next, click on the “Load Program Details” button to activate the remaining drop-down menus in this setup form.

Note: Clicking on the "Load Program Details" button will activate drop-down menus specific to the selection made in Step 1.
Training Program Setup - Adding Degree/Diploma Program

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

<table>
<thead>
<tr>
<th>*Add Training Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>For a Degree/Diploma/Certificate Program, Select Type of Degree Offered</td>
</tr>
<tr>
<td>For a Degree/Diploma/Certificate Program, Select Primary Focus Area</td>
</tr>
<tr>
<td>Select Delivery Mode Used to Offer Program</td>
</tr>
</tbody>
</table>

Add Record

Figure 5. Training Program Setup - Adding Degree/Diploma Program

For a Degree/Diploma/Certificate Program, Select Type of Degree Offered: To complete your entry, select the degree program of students who received BHW-funded financial awards during the annual reporting period by clicking on the drop-down menu next to “For a Degree/Diploma/Certificate Training Program, Select Type of Degree Offered” and choosing one of the following options:

- DNP
- MS
- DNAP
- DNSc / DNS
- MSN/MBA
- MSN/MPH
- MA
- MSN
- PhD
- EdD
- MSN/MHA

For a Degree/Diploma/Certificate Program, Select Primary Focus Area: Next, select the degree program's primary focus area by clicking on the drop-down menu next to “For a Degree/Diploma/Certificate Training Program, Select Primary Focus Area” and choosing one of the following options:

- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Nursing - NP - Adult
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - NP - Acute care pediatric

Nurse Faculty Loan Program
Select Delivery Mode Used to Offer Program: Next, select the primary mode used to deliver each degree program during the annual reporting period by clicking on the drop-down menu under and choosing one of the options from the list below.

Click on the "Add Record" button to save your entry. Repeat this process to capture the degree programs of all students who received a BHW-funded financial award during annual reporting period.

- Campus-based program
- Distance learning program
- Hybrid program

Example: The John Doe School of Nursing provided loans to 7 students between July 1 and December 31. Among the 7 students who received a loan, 6 were enrolled in a PhD program with a focus area in Nursing Research and 1 was enrolled in an MSN program with a focus in NP-Family. In the setup form, the John Doe School of Nursing would enter each degree program, focus area and mode of delivery separately—for a total of 2 entries.
Training Program Setup - Selecting Training Activity Status

Select Training Activity Status in the Current Reporting Period

(2)

Figure 6. Training Program Setup - Selecting Training Activity Status

To complete the Training Program Setup form, please review the Saved Records Table to ensure that all degree programs supported with grant funds during the annual reporting period were captured accurately.

For new records, please review the information contained in the table for accuracy and, for any reason a record has to be deleted, simply click on the "Delete" link under the Option(s) column.

Select Training Activity Status in the Current Reporting Period: Select the Training Activity Status of all reported training programs by choosing one of the options from the list below. If you are reporting on a program, please choose ‘Active.’

- Active
- Inactive

Note: No action is needed for prior records, if they remain Active. If a prior record training program no longer has active enrollees (no students are enrolled and all students have already graduated), you may select ‘Inactive’ as the status of the program. Selecting ‘Inactive’ indicates the training program is completed, you are no longer administering it, and you have no active INDGEN records or faculty development programs. You will not report on any aspect of an inactive program, and all records associated with the program (i.e., EXP records) will be made inactive.

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.
PC-1: Program Characteristics – Degree/Diploma/Certificate Training Programs

PC-1 - Entering Enrollment Information

⚠️ Warning: For degree programs previously reported, Column 4 will appear as read-only and is not editable. If the delivery mode for a degree program has changed, this requires a new entry in the Training Program Setup form.

⚠️ Warning: If no new records were added in the Training Program Setup form, complete the PC-1 subform for prior records.

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

<table>
<thead>
<tr>
<th>Enter Total # Enrolled (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>(7) Block 3</td>
</tr>
</tbody>
</table>

Figure 7. PC-1 - Entering Enrollment Information

The columns on the PC-1 subform (i.e. Columns 7-9) apply to all records and capture information about the total number of students enrolled in degree programs where BHW-funded financial awards were provided during the annual reporting period. Please follow the instructions below to complete the PC-1 subform.

Enter Total # Enrolled (whether funded by BHW or not): Total:

For Column 7, enter the total number of students who participated in each degree program during the current reporting period. Count all students who participated, regardless of whether the student received a BHW-funded financial award.

Enter Total # Enrolled (whether funded by BHW or not): URM:
For Column 8, enter the number of students who participated in each degree program during the current reporting period who were underrepresented minorities.

**Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM:**

For Column 9, enter the number of students from disadvantaged backgrounds who participated in the degree program during the current reporting period but were not underrepresented minorities.

Columns 8 and 9 are subsets of Column 7.

Students who permanently left their degree program before graduation (i.e., attrition) will be counted separately in Column 12.

*Note: Refer to the glossary for a definition of underrepresented minority.*

*Note: Refer to the glossary for a definition of disadvantaged background.*

**Example:** The John Doe School of Nursing had a total of 27 students enrolled in the PhD program with a focus area in Nursing Research. The school used BHW funds to provide loans to 6 out of the 27 students in the program during the annual reporting period. During this period, 2 students permanently left the degree program before completion.

In Column 7 of this form, the John Doe School of Nursing would enter 25.

**Example:** The John Doe School of Nursing had a total of 25 students maintain enrollment in the PhD program with a focus area in Nursing Research during the annual reporting period. Among the 25 students enrolled in this degree program, 15 are underrepresented minorities.
In Column 8, the John Doe School of Nursing would enter 15.

Example: The John Doe School of Nursing had a total of 25 students maintain enrollment in the PhD program with a focus area in Nursing Research during the annual reporting period. Among the 25 students enrolled in this degree program, a total of 10 students are from disadvantaged backgrounds. Six (6) out of the 10 students from a disadvantaged background are also underrepresented minorities.

In Block Column 9, the John Doe School of Nursing would enter 4.
PC-1 - Entering Graduate Information

<table>
<thead>
<tr>
<th>Enter Total # Graduated/Completed (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>(10) Block 8</td>
</tr>
</tbody>
</table>

Figure 8. PC-1 - Entering Graduate Information

Enter Total # Graduated/Completed (whether funded by BHW or not): Total:

In Column 10 (Block 8), enter the total number of students who graduated from their degree program during the current reporting period. Count all students who graduated, regardless of whether the student directly received a BHW-funded financial award.

Enter Total # Graduated/Completed (whether funded by BHW or not): URM:

In Column 11 (Block 8a), enter the number of students who graduated from their degree program during the current reporting period and were underrepresented minorities.

Note: Column 10 is a subset of Column 7; Column 11 is a subset of Column 10.

Note: Students who permanently left their degree program before graduation (i.e., attrition) will be counted separately in Column 12 (Block 9).

Example: The John Doe School of Nursing had a total of 25 students maintain enrollment in the PhD program with a focus area in Nursing Research during the annual reporting period. Among the 25 students enrolled in this degree program, a total of 8 students completed all degree requirements and graduated during this period. In Column 10, the John Doe School of Nursing would enter 8.
Example: The John Doe School of Nursing had a total of 25 students maintain enrollment in the PhD program with a focus area in Nursing Research during the annual reporting period. Among the 25 students enrolled in this degree program, a total of 8 completed all degree requirements and graduated during this period. Four (4) out of the 8 students who graduated are underrepresented minorities. In Block Column 11, the John Doe School of Nursing would enter 4.
PC-1 - Entering Attrition Information

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total:

In Column 12 (Block 9), enter the total number of students who permanently left their degree programs before completion during the current reporting period. Count all students who permanently left their degree programs regardless of whether or not the student directly received a BHW-funded financial award.

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM:

In Column 13 (Block 9a), enter the number of students who permanently left their degree programs before completion during the current reporting period and were underrepresented minorities.

Note: Column 13 (Block 9a) is a subset of Column 12 (Block 9). The total entered in Column 12 (Block 9) is exclusive of the total number of students Column 7 (Block 3).

Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.

Example: The John Doe School of Nursing had a total of 27 students enrolled in the NP program with a focus area in Family. The school used BHW funds to provide traineeships to 3 out of the 27 students in the program during the annual reporting period. During this period, 2 students permanently left the degree program before completion and none who left were underrepresented minorities.
In Column 13 of this form, the John Doe School of Nursing would enter 0. The completed PC-1 subform for the John Doe School of Nursing would look identical to the image below.

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.
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 11. IND-GEN - Setup

⚠️ 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 likely have a browser compatibility problem. Please refer to the Getting Started-Browser Settings page at the beginning of this manual.
IND-GEN - Selecting Type of Training Program

Figure 12. IND-GEN - Selecting Type of Training Program

Type of Training Program:

Select each individual's training program by clicking on the drop-down menu and choosing one of the available options.

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

Note: The type of training program entitled "Other" does not apply to this program.
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 updates for each individual and one-year follow-up data for trainees.

💡 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 - 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:

- Enrollee (campus-based only)
- Enrollee (distance learning only)
- Enrollee (hybrid)

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 - Selecting Individual's Enrollment/Employment Status

Select Individual's Enrollment / Employment Status:

Select each individual’s current enrollment or employment status 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

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

Select each individual’s year of birth in the dropdown menu under Column 6a.

- 1917
- 1918
- 1919
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- 1976
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<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Year 7</th>
<th>Year 8</th>
<th>Year 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>2014</td>
<td>2015</td>
<td>2016</td>
<td>2017</td>
<td>Not Reported</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 6) and choosing one of the following options:

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

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 - Selecting Individual's Race

Figure 19. 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 following 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.

💡 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 - 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

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

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 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

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 the various types of veteran statuses.
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></td>
<td>Loan</td>
</tr>
<tr>
<td></td>
<td>(12) Block 11</td>
</tr>
<tr>
<td></td>
<td>(16) Block 11</td>
</tr>
</tbody>
</table>

Figure 23. 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 following options:

- Yes
- No

Enter Individual's Financial Award Amount (BHW funds only): Loan: If the student received a BHW-funded financial award, enter the total amount of BHW dollars provided during the annual reporting period in the textbox under the column labeled "Loan". The total amount reported should account for all BHW dollars including those applied to tuition, fees, and reasonable living expenses, as allowed by federal statutes and regulations. Amounts listed in Current Year Loaned Amounts CANNOT exceed the maximum for each academic year of $35,500.

If the student did not receive a BHW-funded financial award, enter "0" in the textbox under the column labeled "Loan".
Warning: All NEW records should be for individuals who did receive direct financial support ("Yes" for Column 12). The NO response should only be selected for prior records of trainees who did not receive support in the current reporting period.

Students who have never received NFLP funding ($0 Cumulative Amount) should not be included in this form.
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) Block 12</td>
</tr>
</tbody>
</table>

Figure 24. 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. For example, if a resident or dentist has received a financial award for 1 ½ years, please enter 2.

**Note:** If an individual received a BHW-funded financial award for the first time during the annual reporting period, select "1" under Block 12.
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:

- Graduate Year 1
- Graduate Year 2
- Graduate Year 3
- Graduate Year 4
- Graduate Year 5
- Graduate Year 6
- Graduate Year 7

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

<table>
<thead>
<tr>
<th>Select any HHS Priority Topic Area on which an Individual Received Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>(26b) Block 15</td>
</tr>
</tbody>
</table>

**Figure 26. 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
IND-GEN - Selecting Whether Individual Left the Program Before Completion

Select Whether Individual Left the Program Before Completion:

Select whether each individual permanently left their training 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

Figure 27. IND-GEN - Selecting Whether Individual Left the Program Before Completion
## 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 28. 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 a student graduated from their degree program during the annual reporting period, select the type of degree earned through the program by clicking on the drop-down menu under Column 38 and choosing one of the options from the list below. If a student did not graduate, select "N/A" under Column 38.

- DNAP
- EdD
- MSN
- DNP
- MA
- MSN/MBA
- DNSc/DNS
- MS
- MSN/MBA
- MSN/MHA
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 all that apply from the options listed below. If an individual did not complete their training program during the current reporting period, select “N/A” in Column 39 (Block 22b).

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

⚠️ Warning: For Column 39 (Block 22b), None of the above and N/A cannot be selected in combination with any other option.
IND-GEN - Entering the Number of Education Courses Taken

Enter the Number of Education Courses Taken: For each individual, enter the number of education courses taken during the current reporting period in Column 38c.

Click the Save and Validate button to complete the form.
## INDGEN-PY: Individual Prior Year

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

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

<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 Individual's Type of Faculty Appointment</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>(15) Block 23b</td>
<td>(16)</td>
<td>(17)</td>
<td>(18)</td>
</tr>
</tbody>
</table>

Grayed fields are provided here for identification purposes only.

**Select whether status/employment data are available for the individual 1-year post graduation/completion:**

To select whether current training/employment data are available for each prior program completer click on the drop-down menu in Column 13 (Block 23) and choose one of the following options:

- Yes
- No

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

Select the individual’s current training/employment status by clicking on the drop-down menu in Column 14 choosing all that apply from the options below. If employment data are not available for the individual, select “N/A.”
• Individual has applied to full-time faculty vacancies and has not obtained a full-time appointment
• Individual has applied to full-time faculty vacancies and has obtained a part-time faculty position in combination with a clinical preceptor/educator position
• Individual has obtained a full-time faculty appointment
• Individual is currently employed or is pursuing further training in a primary care setting
• Individual meets criteria for deferment status
• N/A

Select Individual's Type of Faculty Appointment:

If current training/employment data are available, select the individual's type of faculty appointment by clicking on the drop-down menu under Column 15 and selecting one of the options below. If current training/employment data are not available, select 'N/A' in Column 15.

- Graduate level - Doctorate
- Nursing Diploma School
- Undergraduate level
- N/A
- Graduate level - Masters
- Two-year College
- 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 under Column 16 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- No
- Yes
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.

Deferment status: NFLP borrowers are eligible for deferment for up to three years, (1) when the borrower is ordered to active duty as a member of a uniformed service of the United States (Army, Navy, Marine Corps, Air Force, Coast Guard, the National Oceanic and Atmospheric Administration
a borrower who voluntarily joins a uniformed service is NOT eligible for deferment, nor is a borrower who is employed by one of the uniformed services in a civilian capacity, or (2) when the borrower who graduates and is employed, and decides to return to a graduate nursing education program to pursue a doctoral degree to further their preparation as nurse faculty.

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.
**NFLP-1: Program Accounts Section (Part-1)**

**NFLP-1 - Entering Federal Funds Award Information**

<table>
<thead>
<tr>
<th>A. FEDERAL FUNDS AWARDED</th>
<th>Cumulative($) (from previous year)</th>
<th>Cumulative($) (includes current year)</th>
<th>Current Year($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Figure 31. NFLP-1 - Entering Federal Funds Award Information*

**Amount:** The amount should reflect the Federal Capital Contribution (FCC) amount shown on the fiscal year Notice of Award for the current year and the cumulative amount of awards made to your institution since beginning the NFLP. **Data in both the current and cumulative columns will be pre-populated and cannot be edited.**
NFLP-1 - Entering Start of Report Period Cash Balance

<table>
<thead>
<tr>
<th>B. CASH BALANCE - START OF REPORT PERIOD</th>
<th>Current Year($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td></td>
</tr>
</tbody>
</table>

Figure 32. NFLP-1 - Entering Start of Report Period Cash Balance

**Amount:** The amount should reflect the ending “cash balance” from the institution’s prior Annual Performance Report (APR). **Data in the current column will be pre-populated and cannot be edited.** Cumulative data is not applicable.
Nurse Faculty Loan Program

C. CASH RECEIPTS

<table>
<thead>
<tr>
<th>Description</th>
<th>Cumulative($) (from previous year)</th>
<th>Cumulative($) (includes current year)</th>
<th>Current Year($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Funds Received/Receivable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Contributions Deposited</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan Principal Collected</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest Income Collected on Loans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Penalty Charges Collected on Loans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Repayments of Bad Debts, Principal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Repayments of Bad Debts, Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Repayments of Bad Debts, Penalty Charges</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 33. NFLP-1 - Entering Cash Receipts Information

**Cash Receipts Total:** Total amount of items C.1 through C.9 for the current award year. Data in both the current and cumulative columns will autopopulate (update) based on current data entered for items C.1 through C.9.

**Federal Funds Received/Receivable:** The amount should reflect the total FCC actually drawn down from the Payment Management System (PMS) and deposited into the NFLP fund. Report the amount of the FCC drawn-down by the institution for the current year.

**Institutional Contributions Deposited:** The amount must equal a minimum of at least one-ninth of the Federal Capital Contribution funds drawn down from PMS. Report the amount of the ICC (1/9 of the total FCC) deposited into the NFLP fund for the current award year.
Loan Principal Collected: Report the amount of loan principal collected from borrowers for the current award year.

Interest Income Collected on Loans: Report the amount of interest on loan principal collected from borrowers for the current award year.

Penalty Charges Collected on Loans: Report the amount of penalty charges collected from borrowers for the current award year.

Investment Income: Report the amount of earnings on NFLP funds deposited in any type of interest-bearing account for the current award year. Any fund established by a school with Federal Capital Contributions will be accounted for separately from other funds, providing a clear audit trail for all transactions. The school must at all times maintain all monies relating to the fund in one or more interest-bearing accounts or investment instruments which meet OMB requirements established for Federal monies held by third parties. The school must place all earnings into the fund but may first deduct from total earnings any reasonable and customary charges incurred through the use of an interest-bearing account.

Institutional Repayments of Bad Debts, Principal: Report the amount of any repayments of principal bad debt collected for the current award year.

Institutional Repayments of Bad Debts, Interest: Report the amount of any repayments of interest bad debt collected for the current award year.

Institutional Repayments of Bad Debts, Penalty Charges: Report the amount of any repayments of bad debt penalty charges for the current award year.

Note: Cash Receipts Total: Total amount of items C.1 through C.9 for the current award year. Data in both the current and cumulative columns will auto-populate (update) based on current data entered for items C.1 through C.9.

Note: Any fund established by a school with Federal Capital Contributions will be accounted for separately from other funds, providing a clear audit trail for all transactions. The school must at all times maintain all monies relating to the fund in one or more interest-bearing accounts or investment instruments which meet OMB requirements established for Federal monies held by third parties. The school must place all earnings into the fund but may first deduct from total earnings any reasonable and customary charges incurred through the use of an interest-bearing account.

Note: Institutions have the ultimate responsibility for bad debts losses not approved for write-off by the Department of Health and Human Services (DHHS). There is nothing to prevent an institution from further pursuing the collection of a bad debt after it has been disapproved for write-off by DHHS; any amounts recovered would lessen the institution’s liability.
Nurse Faculty Loan Program

**NFLP-1 - Entering Cash Disbursements Information**

Enter current data only. Cumulative data cannot be edited.

<table>
<thead>
<tr>
<th>D. CASH DISBURSEMENTS</th>
<th>Cumulative($) (from previous year)</th>
<th>Cumulative($) (includes current year)</th>
<th>Current Year($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loaned to Students</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Federal Government, Principal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Federal Government, Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Federal Government, Other Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Institution, Principal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Institution, Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repayments to Institution, Other Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection Agent Costs, Principal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection Agent Costs, Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Litigation Costs, Principal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Litigation Costs, Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Bureau Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Costs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 34. NFLP-1 - Entering Cash Disbursements Information**

**Loaned to Students:** Report the total amount of NFLP funds loaned to students for the current award year.
Repayments to Federal Government, Principal: Report the total amounts repaid to Federal Government for the current year. Repayments to Federal Government is excess cash returned to the Division of Payment Management. DO NOT include amounts returned to PMS because those amounts should be adjusted against Federal Funds Received within the appropriate award period.

Repayments to Federal Government, Interest: Report the total amounts repaid to Federal Government for the current year.

Repayments to Federal Government, Other Income: Report the total amounts repaid to Federal Government for the current year.

Repayments to Institution, Principal: Report the total amount of loan principal repaid by loan recipients to the institution for the current award year. The institution’s proportionate share of excess cash in the NFLP fund that has been repaid to the institution. DO NOT show withdrawal of funds as a result of excess institutional contributions in this item.

Repayments to Institution, Interest: Report the total amount of interest on student loans repaid by loan recipients to the institution for the current award year.

Repayments to Institution, Other Income: Report the total amount of other income repaid to the institution for the current award year. This item would include any amounts in items C.7, C.8 and C.9 that were repaid to the institution in conjunction with a repayment to the Federal government.

Collection Agent Costs, Principal: The full amount of principal and interest collected must be reported in items C.3, C.4 and C.5. The associated collection costs must be prorated.

Collection Agent Costs, Interest: The full amount of principal and interest collected must be reported in items C.3, C.4 and C.5. The associated collection costs must be prorated.

Litigation Costs, Principal: Litigation costs associated with the collection of a loan and interest must be prorated in the same manner as collection costs.

Litigation Costs, Interest: Litigation costs associated with the collection of a loan and interest must be prorated in the same manner as collection costs.

Credit Bureau Fees: Report the total amount of cost associated with charges from Credit Bureaus related to collection of loans for the current award year.
Other Costs: Report the total amount of other costs charged to the fund (i.e., overpayments and underpayments of $10.00 or less) for the current year. DO NOT include administrative costs such as BILLING AGENCY COSTS, SALARIES, STAMPS, BANK CHARGES, and the like, incurred by the institution.

Note: Cash Disbursements Total: Total amount of items D.1 through D.13 for the current year. Data in the current and cumulative columns will auto-populate (update) based on current data entered for items D.1 through D.13.

Example: EXAMPLES OF PRORATING COLLECTION COSTS (Litigation Costs to Be Prorated in Same Manner):
An institution directs a collection agency to collect $1,000.00 principal and $200.00 interest for a total of $1,200.00 from a delinquent borrower. The collection agency collects all $1,200.00 but deducts $360.00, or 30% of the amount collected, before remitting the net amount of $840.00 to the institution. The institution reports as follows:

- Loan Principal Collected $1,000.00
- Interest Income Collected 200.00
- Collection Costs, Principal (30% x $1,000) 300.00
- Collection Costs, Interest (30% x $200) 60.00

An institution directs a collection agency to collect $1,500.00 principal and $500.00 interest for a total of $2,000.00 from a delinquent borrower. At the end of the report period, the collection agency has collected $1,600.00 (80% of $2,000.00), which it remits to the institution with a bill for $480.00 (30% of the $1,600.00 collected). The institution pays the collection agency $480.00 taken from the Fund and reports as follows:

- Loan Principal Collected (80% of the $1,500) $1,200.00
- Interest Income Collected (80% of $500) 400.00
- Collection Costs, Principal (30% of $1,200) 360.00
- Collection Costs, Interest (30% of $400) 120.00
### NFLP-1 - Entering End of Report Period Cash Balance

<table>
<thead>
<tr>
<th>E. CASH BALANCE - END OF REPORT PERIOD</th>
<th>Current Year($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 35. NFLP-1 - Entering End of Report Period Cash Balance**

**Amount:** This amount should equal the actual cash on hand and in the NFLP fund for the current award year. Data in the current column will auto-populate based on the calculation of Item B/Current + Item C.10/Current – Item D.14/Current. Cumulative data is not applicable.

💡 **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.
NFLP-2: Program Accounts Section (Part-2)
NFLP-2- Entering Loan Cancellation Nurse Employment Information

Enter current data only. Data in the cumulative columns will auto-populate (update) based on data entered in current year columns.

<table>
<thead>
<tr>
<th>Description</th>
<th>Cumulative ($)</th>
<th>Current Year ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Borrowers</td>
<td>Principal ($)</td>
</tr>
<tr>
<td>a. NFLP Employment – Yr. 1 (20%)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>b. NFLP Employment – Yr. 2 (20%)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>c. NFLP Employment – Yr. 3 (20%)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>d. NFLP Employment – Yr. 4 (25%)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total (a+b+c+d)</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Figure 36. NFLP-2- Entering Loan Cancellation Nurse Employment Information*

Item F.1: Nursing Employment: Under the appropriate column heading for Nursing Employment years 1-4, report the current year number of borrowers and the amounts of principal and interest approved for cancellation on NFLP loans.
NFLP-2 - Entering Loan Cancellation Death Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Cumulative ($) (includes current year)</th>
<th>Current Year ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Borrowers</td>
<td>Principal ($)</td>
</tr>
</tbody>
</table>

|   | Number of Borrowers | 0 | 0 | 0 | 0 | 0 | 0 |

Figure 37. NFLP-2 - Entering Loan Cancellation Death Information

Item F.2: Death of Borrower: Report only the information for loans made on or after July 22 of prior year. Under the appropriate column headings, report the current number of borrowers and the amounts of principal and interest that were approved for cancellation by the institution due to death.
Nurse Faculty Loan Program

NFLP-2 - Entering Loan Cancellation Permanent and Total Disability Information

Figure 38. NFLP-2 - Entering Loan Cancellation Permanent and Total Disability Information

Item F.3: Permanent and Total Disability Approved by HHS: Report only the information for loans made on or after July 22 of prior year. Under the appropriate column headings, report the current number of borrowers and the amounts of principal and interest that has been approved for cancellation by HHS due to permanent and total disability.
Nurse Faculty Loan Program

**Figure 39. NFLP-2 - Entering Bad Debts Information**

Item G: Bad Debts Approved for Write-off by DHHS: Report amounts for write-off and any subsequent collections that are received and has been approved for write-off by HHS.

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.
NFLP-3: Program Accounts Section (Part-3)

NFLP-3 - Entering Default Rate Information

<table>
<thead>
<tr>
<th>H. Default Rate Status (Pre-populated: No entry required)</th>
<th>2.88</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Rate (%)</td>
<td></td>
</tr>
</tbody>
</table>

Figure 40. NFLP-3 - Entering Default Rate Information

Data will be pre-populated.
### Figure 41. NFLP-3 - Entering Checklist Information

Report the total amount of interest that is past due

<table>
<thead>
<tr>
<th>H. CHECK LIST/QUESTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the total amount ($ of interest that is past due?</td>
</tr>
<tr>
<td>Does your institution provide for a biennial audit of the loan and/or scholarship funds by a qualified independent auditor?</td>
</tr>
</tbody>
</table>
Provide latest A-133 Audit information.

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.
NFLP-4 Borrower Accounts Section (Part-4)

NFLP-4 - Entering Borrowers Information

For this section, schools must report the status of all borrower accounts as of the end of this reporting period (June 30), not just the accounts that changed status during this reporting period. All data for this section is cumulative. The dollar amount entered in each column represents the total amount for the number of borrowers in each loan status category (e.g., student, grace period, cancellation, etc.).

<table>
<thead>
<tr>
<th>Description</th>
<th>Number of Borrowers (1)</th>
<th>Principal Loaned ($) (2)</th>
<th>Principal Repaid ($) (2)</th>
<th>PRINCIPAL CANCELED</th>
<th>Principal Delinquent ($) (6)</th>
<th>Principal Uncollectible Not Past Due ($) (7)</th>
<th>Principal Outstanding but Not Due ($) (8)</th>
<th>Principal Written Off ($) (9)</th>
<th>Reconciling Difference (columns 2 - sum of columns 3 thru 9)($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. FULLY RETIRED: Repayment/Cancellation</td>
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<td>18. FULLY RETIRED: Cancellation/Death</td>
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<td>19. FULLY RETIRED: Cancellation/Death</td>
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<td>20. FULLY RETIRED: Discharged in Bankruptcy</td>
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<td>21. FULLY RETIRED: HHS Approved Write-off</td>
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<td>22. FULLY RETIRED: Uncollectible per FFL 107-205</td>
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<td>23. CURRENT: Default Status</td>
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<td>24. CURRENT: Grace Period</td>
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<td>25. CURRENT: Deferment Status</td>
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<td>26. CURRENT: Postponement/Cancellation</td>
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<td>27. CURRENT: Repayment - Not Paid Out</td>
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<td>28. CURRENT: Paid Due 1-180 Days</td>
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<td>29. In BANKRUPTCY: Pending Discharge/Wage Earner Agreement</td>
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<td>30. IN DEFAULT: 120 Days and Over</td>
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<td>31. FORBEARANCE: Forbearance</td>
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**Figure 43. NFLP-4 - Entering Borrowers Information**

**COLUMNS - Description of Required Information**

**NUMBER OF BORROWERS** – The number of borrowers who received loans.

**PRINCIPAL LOANED** – The dollar amount of loan principal disbursed. The column total should coincide with the CUMULATIVE amount reported on Form NFLP-1, Line D.1 (Loans to Students).

**PRINCIPAL REPAYED** – The dollar amount of loan principal and interest repaid. The column total should coincide with the CUMULATIVE amounts reported on Form NFLP-1, Line C.3 (Loan Principal Collected) plus Line C.8 (Institutional Repayments of Bad Debt/Principal).

**PRINCIPAL CANCELLED** – Upon Employment as Nurse Faculty – the dollar amount of loan principal cancelled for employment. The column total should coincide with the CUMULATIVE total of amounts reported on Form NFLP-2, Lines F.1a, F.1.b, F.1.c, F.1.d (Principal).
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PRINCIPAL CANCELLED – Upon Death/Disability – The dollar amount of loan principal cancelled due to the death or permanent and total disability of the borrower.

PRINCIPAL DELINQUENT – The dollar amount of loan principal that is delinquent. Include only the amount of those payments that are in deferment of repayment of the loan.

PRINCIPAL UNCOLLECTIBLE NOT PAST DUE – The dollar amount of loan principal not past due which the school has determined to be uncollectible after exercising due diligence in the collection of loans. DO NOT duplicate any of these amounts in OUTSTANDING BUT NOT DUE column.

PRINCIPAL OUTSTANDING BUT NOT DUE – The dollar amount of loan principal outstanding but not yet due according to the original or renegotiated repayment schedule. DO NOT duplicate any amounts in UNCOLLECTABLE NOT PAST DUE column.

PRINCIPAL WRITTEN OFF – The dollar amount of loan principal which has been written off pursuant to receiving written authorization from the DHHS.

ROWS - Description of Required Information:
1. FULLY RETIRED (Borrowers accounts that are closed due to full repayment/cancellation/collection, death, disability, bankruptcy, write-off, uncollectible) NOTE: Data in these fields are mutually exclusive. The number and amount reported in any field should not reflect any student status more than once.
   1. A: Report the information pertaining to borrowers who have fully retired their loans through cash repayments and/or through cancellation for eligible employment/professional practice.
   1. B: Report the information pertaining to borrowers loans that have been fully retired due to death of the borrower.
   1. C: Report the information pertaining to borrowers whose loans have been fully retired due to total disability.
   1. D: Report the information pertaining to borrowers who have fully retired their loans through discharge in bankruptcy and have not received write-off approval.
   1. E: Report the information pertaining to borrowers whose loans have been fully retired due to DHHS approved write-off.
   1. F: Report the information for borrowers whose loans are uncollectible in accordance with the HRSA Student Financial Aid Guidelines-Fiscal Management: Collections.

2. CURRENT (Borrowers accounts that are active based on status as: NFLP student enrollment status, grace period following graduation, deferment of repayment, cancellation/postponement while employed as nurse faculty, repayment, past due) NOTE: Data in these fields are mutually exclusive. The number and amount reported in any field should not reflect any student status more than once.
   2. A: Report the information for borrowers who are currently in student status (enrolled) working toward completion of the degree for which they obtained their loans.
   2. B: Report the information for borrowers who are currently in the grace period due to termination or completion of the course of study for which they obtained their loans.
   2. C: Report the information for borrowers who are currently in deferment of repayment as specified on the NFLP Promissory Note.
2. D: Report the information for borrowers who are currently engaged in employment that qualifies them for cancellation, who have filed a Request for Postponement of Installment Payment, and who are not past due on any payment.

2. E: Report the information for borrowers who are making payments in accordance with their repayment schedules.

2. F: Report the information pertaining to borrowers who have installments past due according through deferment or in postponement for cancellation and who are also past due on any prior payments.

3. IN BANKRUPTCY

3. A: Report the information pertaining to borrowers who have fully retired their loans through discharge in bankruptcy proceedings.

4. IN DEFAULT

4. A: Report the information pertaining to borrowers who are in default in their repayments (120 days and over).

5. FORBEARANCE

5. A: Report the information pertaining to borrowers who are currently in forbearance.

TOTAL: Totals of columns for the information on ALL ACCOUNTS of ALL BORROWERS who have ever received a loan through the NFLP 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.
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.

![Screenshot of Printing Your Performance Report]

Figure 44. 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.

![Screenshot of the Submit Report Page](image-url)

Figure 45. 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 46. 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; AND
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?
You may only select the 'not reported' option during the first reporting period for each trainee. Demographics are required information and grantees are expected to collect and report the information in all subsequent reports.

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.
Where can I find the 4-digit zip code extension?
You can locate your site's 4-digit zip code extension by visiting the US Postal Service website:
https://tools.usps.com/go/ZipLookupAction_input

**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.