Instruction Manual for Grantees of the Mental and Behavioral Health Education and Training

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 MBHET grant program:
   - Faculty development;
   - Curricula & Instructional Design / Program Enhancement;
   - Field Placements for MSW Students; and
   - Pre-degree internships for doctoral-level psychology students.

2. Data submitted by grantees of the program must cover all activities that took place between July 01, 2016 - June 30, 2017 (Referred to as Annual Performance Report).

3. The PRGCA is due no later than July 31, 2017. 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 (877-464-4722) or Call Center Online Assistance Form: click here.
Getting Started

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

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

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

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

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

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

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

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

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

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

1. HRSA’s Electronic Handbook system (EHB) is compatible only with certain Internet browsers that have specific settings. Please check your settings by logging into EHB and clicking the ‘Recommended Settings’ tab that appears in the yellow banner at the top left of your home screen. The system will check your browser and its settings for compatibility.
2. There are multiple checks that are performed, and you must receive green check marks next to each setting in order to proceed. The following link will direct you to a page that displays the list of the checks performed: [Recommended Settings](#).
3. Opening this link in your browser will automatically perform the recommended settings checks. Alternatively, you can access the recommended settings page in the EHBs system by clicking the ‘Recommended Settings’ tab on your EHBs home screen. It is highly recommended to check your settings prior to entering data in the BPMH system.
4. Using different browsers or settings than what is described above may produce unpredictable results. If you find that you are unable to see dropdown menus, cannot enter data into a field, or a form is not appearing, you most likely have a browser compatibility problem.
5. Please check these settings prior to calling the HRSA Call Center or your Government Project Officer. You may be asked to provide a screenshot showing the results of the ‘Recommended Settings’ tab.
Getting Started: Helpful Resources and Recommendations

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

1. Begin PRGCA data entry early and submit your report prior to the deadline.
2. **Browser Settings**: Check your Internet browser and its settings by using ‘Recommended Settings’ tab on the EHB home screen within the yellow banner in the top left corner of the screen. Look for green check marks for all system requirements in order to meet system requirements and proceed.
3. **Reporting on Your Grant**: Several resources are available through HRSA’s “Reporting on Your Grant” link [http://bhw.hrsa.gov/grants/reporting/index.html](http://bhw.hrsa.gov/grants/reporting/index.html) including general EHB guidance as well as links to the performance measures and program manual.
4. **Resource Links**: Several resources are available via the ‘Resource’ tab on the EHB home screen including the following links:
   1. View Prior Period Data- Previously submitted PRGCA data are available in read-only mode
   2. Glossary- Current definitions of key terms
   3. Instruction Manual- Electronic copy of this program manual (can also be found on the HRSA.gov website)
5. **Video Recordings**:
6. **Grant Personnel**: Review your grant personnel listed in EHB and update this list as necessary. Ensure that listed personnel have appropriate authorizations (i.e., PRGCA submission, etc.). Make sure you have a backup person in place to submit your report!
7. **Sequence of Forms**: Complete PRGCA forms in the order they appear (i.e., complete EXP-1 prior to EXP-2)
8. **Saving and Validating**: You must click ‘Save and Validate’ in order to move to the next form. Save your work frequently (every 15-20 minutes) and print a hard copy of your report prior to submission.
9. **Government Project Officers**: Contact your Government Project Officer if you need further assistance on the content of your report.
10. **HRSA Call Center**: If you need additional assistance, contact the HRSA Call Center. If you have contacted the Call Center and are waiting for a reply, you should follow-up with them 48 hours after the initial contact. Have your ticket number ready (the same ticket number will be used at all tier levels now). Do not wait for the Call Center to return a phone call or email: **Call Center Phone Number: 877-Go4-HRSA/877-464-4772** or Call Center Online Assistance Form [click here](https://help.hrsa.gov/display/public/EHBSKBFG/BPMH+Videos).
# 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>
<th>Applicable Grant Purpose(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Grant Purpose</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Training Program</td>
<td>MBHET-2,MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>Program Characteristics-PC Subforms</td>
<td>PC-4</td>
<td>MBHET-2</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>Program Characteristics-PC Subforms</td>
<td>PC-7</td>
<td>MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>IND-GEN</td>
<td>MBHET-2,MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>INDGEN-PY</td>
<td>MBHET-2,MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>Experiential Characteristics-EXP Subforms</td>
<td>EXP-1</td>
<td>MBHET-2,MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>Experiential Characteristics-EXP Subforms</td>
<td>EXP-2</td>
<td>MBHET-2,MBHET-3,MBHET-4</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>Course Development and Enhancement-CDE Subforms</td>
<td>CDE-1</td>
<td>MBHET-1</td>
</tr>
<tr>
<td>Order</td>
<td>Type of Form</td>
<td>Parent Form</td>
<td>Form ID</td>
<td>Applicable Grant Purpose(s)</td>
</tr>
<tr>
<td>-------</td>
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<td>--------------------------------------------------</td>
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<td>-----------------------------</td>
</tr>
<tr>
<td>10</td>
<td>Performance Data Form</td>
<td>Course Development and Enhancement-CDE Subforms</td>
<td>CDE-2</td>
<td>MBHET-1</td>
</tr>
<tr>
<td>11</td>
<td>Performance Data Form</td>
<td>Continuing Education Activities-CE Subforms</td>
<td>CE-1</td>
<td>MBHET-1</td>
</tr>
<tr>
<td>12</td>
<td>Performance Data Form</td>
<td>Continuing Education Activities-CE Subforms</td>
<td>CE-2</td>
<td>MBHET-1</td>
</tr>
</tbody>
</table>
# Grant Purpose – Setup

## Selecting Grant Purpose(s)

<table>
<thead>
<tr>
<th>Grant Purpose</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBHET-1: Develop and implement interdisciplinary training</td>
<td></td>
</tr>
<tr>
<td>MBHET-2: Add to existing, expand, and/or foster the development of new pre-degree internship slots for psychology doctoral students (PhD/PsyD) and provide stipend support for such slots</td>
<td></td>
</tr>
<tr>
<td>MBHET-3: Add to existing, expand, and/or foster the development of field placement slots for Masters of Social Work (MSW) students and provide stipend support for such placements</td>
<td></td>
</tr>
<tr>
<td>MBHET-4: Add to existing, expand, and/or foster the development of new practica slots for psychology doctoral students (PhD/PsyD) and provide stipend support for such slots</td>
<td></td>
</tr>
</tbody>
</table>

![Figure 3. Selecting Grant Purpose(s)](image)

To configure the BPMH system, complete the Grant Purpose Setup form by selecting the specific type(s) of activities that were supported with grant funds during the annual reporting period (July 01, 2016 - June 30, 2017).

**Warning:** Some options in the Grant Purpose form will be automatically selected based on information provided in a previous reporting period. Unselecting a grant purpose will cause related forms and data to be deleted. If you need to unselect a grant purpose, contact your project officer first to ensure you do not unnecessarily lose any data.

**Note:** Selections made in this form will affect the types of subforms and/or drop-down menu options that will appear throughout the BPMH system.

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.
Training Program - Setup
Training Program Setup - Selecting Type of Training Program

**Purpose:** The Training Program Setup form will configure all subsequent subforms specific to internships and practica/field placements (depending on your grant).

<table>
<thead>
<tr>
<th>Add Training Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Type of Training Program Offered</td>
</tr>
<tr>
<td>(Click the ‘Load Program Details’ button after selecting your training program)</td>
</tr>
<tr>
<td><img src="button" alt="Load Program Details" /></td>
</tr>
</tbody>
</table>

Add Record

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**Select Type of Training Program Offered:** Select the type of training program supported through the grant during the current annual reporting period by clicking on the drop-down menu and choosing one of the following options:

- Internship Program
- Practicum/Field Placement program

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⚠️ **Warning:** If you have no NEW training programs to add, proceed to the manual section entitled “Training Program Setup: Final Steps.”
Click on the “Load Program Details” button. This will activate additional drop-down menus specific to the type of training program selected.
Training Program Setup - Adding Field Placement/Practicum Program

*Add Training Program

For a Fellowship, Residency, Practicum/Field Placement, Internship or 1-year Retraining Program, Select the Primary Discipline of Individuals Trained

Add Record

Figure 6. Training Program Setup - Adding Field Placement/Practicum Program

For a Fellowship, Residency, Practicum/Field Placement, Internship or 1-year Retraining Program, Select the Primary Discipline of Individuals Trained: Select the primary profession and discipline of individuals in the practicum/field placement program by clicking on the drop-down menu and choosing one of the following options:

- Student - Graduate - Psychology
- Student - Graduate - Social Work
Training Program Setup - Adding Internship Program

**Figure 7. Training Program Setup - Adding Internship Program**

For a Fellowship, Residency, Practicum/Field Placement, Internship or 1-year Retraining Program, Select the Primary Discipline of Individuals Trained: Select the primary profession and discipline of individuals in the internship program by clicking on the drop-down menu and choosing one of the following options:

- Student - Graduate - Psychology
Training Program Setup - Selecting Training Activity Status

Select Training Activity Status in the Current Reporting Period

Select the status of each training program at the end of the annual reporting period (i.e. June 30, 2017) by choosing one of the options below:

- Active
- Inactive

Note: Select **Active** if you are reporting activity for a program, that was offered during the current annual reporting period.

Note: Select **Inactive** if a training program that was NOT offered during the current annual reporting period. Selecting ‘Inactive’ indicates that the training program is completed, you are no longer administering it, and you have no active INDGEN records. You will not report on any aspect of an inactive program, and all records associated with the program (i.e., EXP records and CE 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-4: Program Characteristics – Internship Programs

PC-4 - Selecting Type(s) of Partners/Consortia

Select Type(s) of Partners/Consortia Used to Offer this Training: Complete Column 3 (Block 2) by selecting all of the type(s) of partnerships or consortia used or established for the purpose of offering each internship program during the annual reporting period. Choose all that apply from the following options:

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health department - Local
- Health disparities research center
- Hospice
- Long-term care facility
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Day and home care programs (i.e.; Home Health)
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government -Other
- Geriatric Behavioral or Mental Health Units
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HRSA Program
- FQHC or look-alike
- Geriatric consultation services
- Health department - Tribal
- Health policy center
- Local Government
<table>
<thead>
<tr>
<th>Mental and Behavioral Health Education and Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warning: You may not select &quot;No partners/consortia used&quot; in combination with any other option.</td>
</tr>
</tbody>
</table>
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

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

<table>
<thead>
<tr>
<th>Total</th>
<th>URM</th>
<th>Disadvantaged Background and not URM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4) Block 3</td>
<td>(5) Block 3a</td>
<td>(6) Block 3b</td>
</tr>
</tbody>
</table>

Figure 10. PC-4 - Entering Enrollment Information

Enter Total # Enrolled (whether funded by BHW or not): Total: In Column 4 (Block 3), enter the total number of students who participated in each internship program during the current annual reporting period. Count all students who participated in the internship program, regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

Enter Total # Enrolled (whether funded by BHW or not): URM: In Column 5 (Block 3a), enter the number of students who participated in the internship program during the current annual reporting period and were underrepresented minorities.

Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM: In Column 6 (Block 3b), enter the number of students from disadvantaged backgrounds who participated in the internship program during the current annual reporting period but were not underrepresented minorities.

Note: Blocks 3a and 3b are subsets of Block 3.

Note: Students who permanently left their internship before completion (i.e. attrition) will be counted separately in Column 9 (Block 9).
Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.

Example: The John Doe School of Psychology had 18 graduate-level psychology students participate in internships during the current annual reporting period. Among the 18 graduate-level psychology students who participated, 9 were underrepresented minorities. In addition, 3 students were from disadvantaged backgrounds, but were not under-represented minorities.

- In Column 4 (Block 3), the reporting official would enter 18.
- In Column 5 (Block 3a), the reporting official would enter 9.
- In Column 6 (Block 3b), the reporting official would enter 3.
PC-4 - Entering Graduate Information

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

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

<table>
<thead>
<tr>
<th>Total</th>
<th>URM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
<td>(8)</td>
</tr>
<tr>
<td>Block 8</td>
<td>Block 8a</td>
</tr>
</tbody>
</table>

Figure 11. PC-4 - Entering Graduate Information

Enter Total # Graduated/Completed (whether funded by BHW or not): Total: In Column 7 (Block 8), enter the total number of students who completed all internship requirements during the current annual reporting period. Count all students who completed the internship program, regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

Enter Total # Graduated/Completed (whether funded by BHW or not): URM: In Column 8 (Block 8a), enter the number of students who completed all internship requirements during the current annual reporting period and were underrepresented minorities.

Note: Block 8 is a subset of Block 3; Block 8a is a subset of Block 8.

Note: Students who permanently left their internship before completion (i.e. attrition) will be counted separately in Column 9 (Block 9).

Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.
Example: The John Doe School of Psychology had 18 graduate-level psychology students participate in internships during the current annual reporting period. Among the graduate-level psychology students who participated in internships, 3 completed all internship requirements. Of those who completed internships, none were underrepresented minorities.

- In Column 7 (Block 8), the reporting official would enter 3.
- In Column 8 (Block 8a), the reporting official would enter 0.
PC-4 - Entering Attrition Information

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

<table>
<thead>
<tr>
<th>Enter Total # Who left the Program Before Completion (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>(9) Block 9</td>
</tr>
</tbody>
</table>

Figure 12. PC-4 - Entering Attrition Information

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total: In Column 9 (Block 9), enter the total number of students who permanently left their internships before completion during the current reporting period. Count all students who permanently left their internship regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM: In Column 10 (Block 9a), enter the number of students who permanently left their internships before completion during the current reporting period and were underrepresented minorities.

Note: Block 9a is a subset of Block 9. The total entered in Block 9 is exclusive of the total number of enrollees (Block 3).

Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.
Example:
The John Doe School of Psychology had 18 graduate-level psychology students participate in internships during the current reporting period. Among the graduate-level psychology students who participated in internships, 2 left the internship program before completion. Neither student was an underrepresented minority.

In Column 9 (Block 9), the reporting official would enter 2.
In Column 10 (Block 9a), the reporting official would enter 0.

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.
Program Characteristics – Practica and Field Placements

PC-7 - Selecting Type(s) of Partners/Consortia

Select Type(s) of Partners/Consortia Used to Offer this Training: Complete Column 3 (Block 2) by selecting all of the type(s) of partnerships or consortia used or established for the purpose of offering each practicum/field placement program during the current annual reporting period.

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health department - Local
- Health disparities research center
- Hospice
- Long-term care facility
- Nonprofit organization (non - faith based)
- Other
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Day and home care programs (i.e. Home Health)
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government -Other
- Geriatric Behavioral or Mental Health Units
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nurse managed health clinic
- Physical therapy/Rehabilitation center
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HRSA Program
- FQHC or look-alike
- Geriatric consultation services
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization (faith - based)
- Nursing home
Warning: You may not select "No partners/consortia used" in combination with any other option.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

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

- **Total**: In Column 4 (Block 3), enter the total number of students who participated in each practicum/field placement program during the current reporting period. Count all students who participated in the practicum/field placement program, regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

- **URM**: In Column 5 (Block 3a), enter the number of students who participated in the practicum/field placement program during the current reporting period and were underrepresented minorities.

- **Disadvantaged Background and not URM**: In Column 6 (Block 3b), enter the number of students from disadvantaged backgrounds who participated in the practicum/field placement program during the current reporting period but were not underrepresented minorities.
Note: Blocks 3a and 3b are subsets of Block 3.

Note: Students who permanently left their practicum/field placement before completion (i.e. attrition) will be counted separately in Column 9 (Block 9).

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

Example:
The John Doe School of Social work had 18 graduate-level social work students participate in practicum/field placement programs during the current reporting period. Among the 18 graduate-level social work students who participated, 9 students were underrepresented minorities. In addition, 3 students were from disadvantaged backgrounds, but were not under-represented minorities.
In Column 4 (Block 3), the reporting official would enter 18.
In Column 5 (Block 3a), the reporting official would enter 9.
In Column 6 (Block 3b), the reporting official would enter 3.
PC-7 - Entering Graduate Information

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

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

<table>
<thead>
<tr>
<th>Total</th>
<th>URM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
<td>(8)</td>
</tr>
<tr>
<td>Block 8</td>
<td>Block 8a</td>
</tr>
</tbody>
</table>

Figure 15. PC-7 - Entering Graduate Information

Enter Total # Graduated/Completed (whether funded by BHW or not): Total: In Column 7 (Block 8), enter the total number of students who completed all practicum/field placement requirements during the current annual reporting period. Count all students who completed the practicum/field placement program, regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

Enter Total # Graduated/Completed (whether funded by BHW or not): URM: In Column 8 (Block 8a), enter the number of students who completed all practicum/field placement requirements during the current annual reporting period and were underrepresented minorities.

Note: Block 8 is a subset of Block 3; Block 8a is a subset of Block 8.

Note: Students who permanently left their practicum/field placement before completion (i.e. attrition) will be counted separately in Column 9 (Block 9).

Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.
Example: The John Doe School of Social Work had 18 graduate-level social work students participate in practicum/field placement programs during the current annual reporting period. Among the graduate-level social work students who participated in practicum/field placements, 3 completed all practicum/field placement requirements. Of those who completed practicum/field placements, none were underrepresented minorities.

- In Column 7 (Block 8), the reporting official would enter 3.
- In Column 8 (Block 8a), the reporting official would enter 0.
PC-7 - Entering Attrition Information

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

| Enter Total # Who left the Program Before Completion (whether funded by BHW or not) |
|----------------------------------|---------------------------------|
| Total                            | URM                             |
| (9) Block 9                      | (10) Block 9a                  |

Figure 16. PC-7 - Entering Attrition Information

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total: In Column 9 (Block 9), enter the total number of students who permanently left their practicum/field placement programs before completion during the current annual reporting period. Count all students who permanently left their practicum/field placement regardless of whether or not the student directly received a BHW-funded financial award (i.e., stipend).

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM: In Column 10 (Block 9a), enter the number of students who permanently left their practicum/field placement programs before completion during the current annual reporting period and were underrepresented minorities.

Note: Block 9a is a subset of Block 9. The total entered in Block 9 is exclusive of the total number of enrollees (Block 3).

Reference: Refer to the glossary for definitions of disadvantaged background and underrepresented minority.
Example: The John Doe School of Social Work had 18 graduate-level social work students participate in practicum/field placements during the current annual reporting period. Among the graduate-level social work students who participated in practicum/field placements, 2 left the practicum/field placement program before completion. Neither student was an underrepresented minority.

- In Column 9 (Block 9), the reporting official would enter 2.
- In Column 10 (Block 9a), the reporting official would enter 0.

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.
IND-GEN: Individual Characteristics
INDGEN - Introduction

Notice to Grantees about Individual-level Data:

- You must complete an IND-GEN 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 IND-GEN and were not marked as having graduated, completed or attrited from their training program by June 30, 2017.
- 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 IND-GEN subform will automatically calculate and display read-only columns labeled “Academic Year Total” and "Cumulative BHW Financial Award Total."
  - The Academic Year Total will display the amount entered for a given academic year.
  - 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 IND-GEN 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.
IND-GEN: Individual Characteristics

IND-GEN - Setup

⚠️ Warning: If you have used the INDGEN form before, this answer is pre-selected ‘Yes’ for you. You do not need to answer this question again.

To begin providing individual-level data for faculty members who received BHW-funded financial awards during the current annual reporting period or to provide updates for faculty members previously reported on IND-GEN, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel form that will allow you to begin data entry.

![Figure 17. 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 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

**Type of Training Program**: Select each individual's training program by clicking on the drop-down menu under the column labeled "Type of Training Program" and choosing one of the available options. The options available in this menu will prepopulate with programs entered and saved in the Training Program Setup Form.

*Note: The option for "Other" that is available in the drop-down menu under the column labeled "Type of Training Program" does not apply to this grant program.*
IND-GEN - Entering Trainee Unique ID

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

⚠️ Warning: It is the responsibility of each grantee to keep a log of all unique IDs used, as these will be required to provide annual updates for each individual and one-year follow-up data for students.
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: For students (enrollees), select type of trainee based on the delivery mode used to offer the training program associated with each individual.
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
- On leave of absence
- Part-time
- Inactive

Note: For students, select enrollment status based on the individual's participation in their degree program.
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: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
**Figure 23. IND-GEN - Entering Year of Birth**

**Enter Year of Birth:** Enter each individual’s year of birth at the end of the current annual reporting period (i.e., June 30, 2017) in the textbox under Column 6a.

- 1917
- 1918
- 1919
- 1920
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- 1974
- 1975
- 1976
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Note: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
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: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
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 (1) 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: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
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 (New and Prior) (Block 8) and choosing one of the following options:

- Yes
- No
- Not Reported

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:** If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.

**Reference:** Refer to the glossary for a definition of disadvantaged background.
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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: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.

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.

Select Whether Individual Received BHW Financial Award?: Select whether each individual received a BHW-funded financial award (i.e., stipend) 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): Stipend:

- If the individual did receive a BHW-funded financial award, select “Yes” in Column 12 (Block 11) and enter the total amount of BHW dollars provided during the current reporting period in the textbox in Column 13.
- If the individual did not receive a BHW-funded financial award, select “No” in Column 12 (Block 11) and enter "0" in the textbox in Column 13.

Note: The amount reported under the column labeled "Stipend" should be the total monies from the grant provided to an individual during the current reporting period for the purposes of participating in the training program that was selected under the column labeled "Type of Training"
Program. 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. Do not include dollars that came from other sources of funding. If an individual participated in more than one (1) program and received stipends for each program, multiple entries on IND-GEN are required to capture participation and stipend amounts for each program separately.
IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

Enter # of Academic Years the Individual has Received BHW Funding

(22)
Block 12

Figure 30. 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 individual has received a BHW-funded financial award by clicking on the drop-down menu in Column 22 (Block 12) and choosing one of the following options:

- 0
- 2
- 4
- 1
- 3
- 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 a partial academic year, please round up to the nearest whole number. For example, if an individual has received a stipend for 1 ½ years, please enter 2 in Column 22 (Block 12).

Note: If an individual received a BHW-funded financial award for the first time during the current annual reporting period, select "1" under Column 22 (Block 12).
IND-GEN - Selecting Individual's Academic or Training Year

Select Individual's Academic or Training Year: **All Records** *(New and Prior)*: Select each individual's **current training year** in the training program by clicking on the drop-down menu under Column 26 (Block 15) and choosing one of the following options:

For **Students**, choose one of the following:

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

*Figure 31. IND-GEN - Selecting Individual's Academic or Training Year*
IND-GEN - Selecting Individual's Primary Discipline

Select Individual's Primary Discipline: Select each individual’s profession and discipline by clicking on the drop-down menu in Column 27 (Block 16) and choosing one of the available options.

- Student - Graduate - Psychology
- Student - Graduate - Social Work
IND-GEN - Entering Training Information in a Primary Care Setting

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

![Figure 33. IND-GEN - Entering Training Information in a Primary Care Setting](image)

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

- Yes
- No

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

- If the individual did receive clinical or experiential training in a primary care setting, enter the total number of hours spent in this type of setting during the annual reporting period in the textbox under Column 29 (Block 17a).
- If the individual did NOT receive clinical or experiential training in a primary care setting, leave the textbox blank under Column 29 (Block 17a).
**IND-GEN - Entering Training Information in a Medically Underserved Area**

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

<table>
<thead>
<tr>
<th>Training in a Medically Underserved Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select Whether Individual Received Training</strong></td>
</tr>
<tr>
<td>(31) Block 18</td>
</tr>
</tbody>
</table>

Figure 34. IND-GEN - Entering Training Information in a Medically Underserved Area

**Training in a Medically Underserved Area: Select Whether Individual Received Training:** Select whether each individual received clinical or experiential training in a medically-underserved community (MUC) during the current annual reporting period by clicking on the drop-down menu in Column 31 (Block 18) and choosing one of the following options:

- Yes
- No

**Training in a Medically Underserved Area: Enter # of Contact Hours:**

- If the individual did receive clinical or experiential training in a medically-underserved community, enter the total number of hours spent in this type of setting during the annual reporting period in the textbox under Column 32 (Block 18a).
- If the individual did NOT receive clinical or experiential training in a medically-underserved community, leave the textbox blank under Column 32 (Block 18a).
IND-GEN - Entering Training Information in a Rural Area

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

<table>
<thead>
<tr>
<th>Training in a Rural Area</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Whether Individual Received Training</td>
<td>Enter # of Contact Hours</td>
</tr>
<tr>
<td>(33) Block 19</td>
<td>(34) Block 19a</td>
</tr>
</tbody>
</table>

Figure 35. IND-GEN - Entering Training Information in a Rural Area

**Training in a Rural Area: Select Whether Individual Received Training:** Select whether each individual received clinical or experiential training in a rural area during the current annual reporting period by clicking on the drop-down menu in Column 33 (Block 19) and choosing one of the following options:

- Yes
- No

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

- If the individual did receive clinical or experiential training in a rural area, enter the total number of hours spent in this type of setting during the annual reporting period in the textbox under Column 34 (Block 19a).
- If the individual did NOT receive clinical or experiential training in a rural area, leave the textbox blank under Column 34 (Block 19a).
IND-GEN - Selecting Whether Individual Left the Program Before Completion

Select Whether Individual Left the Program Before Completion: Select whether each faculty member permanently left their training program before completion during the annual reporting period by clicking on the drop-down menu in Column 36 (Block 21) and choosing one of the following options:

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

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

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

Figure 37. 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 Individual's Post-Graduation/Completion Intentions:

- If an individual did complete their training program during the annual reporting period, select “Yes” in Column 37 (Block 22) and select the individual’s training or employment intentions at the time of completion by clicking on the drop-down menu in Column 39 (Block 22b) and choosing all that apply from the following options:
  - Individual intends to become employed or pursue further training in a medically underserved community
  - Individual intends to become employed or pursue further training in a rural setting

- If an individual did not complete their training program during the annual reporting period select “No” in Column 37 (Block 22) and select “N/A” in Column 39 (Block 22b).
  - Individual intends to become employed or pursue further training in a primary care setting
  - None of the above

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Warning: None of the above, Not reported, and N/A cannot be selected in combination with any other option.

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

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

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

**Figure 38. INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion**

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

- Yes
- No

Select Individual's Current Training/Employment Status:

Select the individual’s current training/employment status by clicking on the drop-down menu in Column 14 choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- Individual is currently employed or is pursuing further training in a medically underserved community
- Individual is currently employed or is pursuing further training in a primary care setting
- Individual is currently employed or is pursuing further training in a rural setting
- 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
- N/A

Select Whether a Partner Organization Hired this Individual:

Select whether a partner organization hired this individual following training program completion by clicking on the drop-down menu under Column 17 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- Yes
- No
- N/A

Select Employment Location:

Select the type of employment location where the individual was hired following training program completion by clicking on the drop-down menu under Column 18 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- Academic Institution
- Critical Access Hospital
- Rural Health Clinic
- Area Health Education Center
- FQHC or Look-Alike
- Other Clinical Training Site
Warning: “None of the above” and “N/A” cannot be selected in combination with any other option

Note: One-year post-completion employment data are not required for 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.
Experiential Characteristics—EXP Subforms

EXP - Introduction

1. Purpose: The EXP forms are used to characterize experiential or clinical training characteristics, including training sites and the number and profession/discipline of trainees.

- The EXP-1 form collects information about the different clinical sites used to provide your trainees with experiential training.
- The EXP-2 subform collects information about the profession and discipline of individuals trained at each site used during the current reporting period.

2. Order of Forms:

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

3. Pre-population of Prior Records (training sites):

- The BPMH system will prepopulate saved information for each previously-used site (i.e., prior record) in the EXP-1 data table.
- You must indicate whether each previously-used site was used again during the current reporting period.

⚠️ Warning: Complete the EXP forms only for sites used to train individuals who appear on the INDGEN subform.
**EXP-1: Training Site Setup**

**EXP-1 - Entering Site Name**

<table>
<thead>
<tr>
<th>Add Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the Site's Name</td>
</tr>
<tr>
<td>Add Record</td>
</tr>
</tbody>
</table>

**Figure 39. EXP-1 - Entering Site Name**

**Site Name:**

Enter the name of any NEW sites used to train individuals during the current reporting period in the row labeled, “Enter the Site’s Name.” Next, click the “Add Record” button. New sites will be listed at the bottom of the data table, beneath all previously used sites (i.e., prior records). Repeat this process as necessary to enter the names of each NEW site used during the current reporting period.

**Warning:** Complete the EXP-1 and EXP-2 subforms only for sites used to train trainees who appear on the INDGEN subform.

**Note:** Previously used training sites (i.e., prior records) will be saved from prior reporting years. They do not need to be re-entered.
EXP-1 - Selecting Whether the Site was Used in the Current Period

Select Whether the Site was Used in the Current Reporting Period:

Select whether each site was used during the reporting period by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Yes
- No

Warning: For NEW sites, you must select "Yes" in Column 2.

Note: If the clinical site was used in the current reporting period, then you must enter or update information for all subsequent columns in that row. If the clinical site was NOT used in the current reporting period, then the remaining columns are not required.

Note: If a clinical site was NOT used in the current reporting period, then it will not appear on EXP-2 as a dropdown option in Column 1.
Select Type of Site Used:

Select the type of sites used to train individuals during the current reporting period by clicking on the drop-down menu under Column 3 and choosing from one of the following options:

- Academic institution
- Aerospace operations setting
- Community-based care programs for elderly mentally challenged individuals
- Community care programs for elderly mentally challenged individuals
- Critical Access Hospital
- Dentist Office
- Federal and State Bureau of Prisons
- Geriatric ambulatory care and comprehensive units
- Hospice
- Hospital - community
- Hospital - non profit
- International nonprofit/nongovernmental organization
- Long-term Care Facility
- National health association or affiliate
- Other
- Physician Office
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community-based organization
- Community Health Center (CHC)
- Day and home care programs (e.g. Home Health)
- Emergency Room
- Federal Government Office or Agency
- Geriatric Behavioral or Mental Health Units
- Hospital
- Hospital - federal
- Independent Living Facility
- Local Government Office or Agency
- Mobile Clinic/Site
- Acute care services
- Assisted Living Community
- Community Behavioral Health Center
- Community Mental Health Center
- Dental Services
- Extended care facilities
- FQHC or look-alike
- Geriatric consultation services
- Hospital - academic center
- Hospital - for profit
- Indian Health Service (IHS) site
- Local health department
- National health association
- Nursing Home
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Health Resources and Services Administration
Bureau of Health Workforce

- Rural Health Clinic
- Specialty clinics (e.g. mental health practice rehabilitation substance abuse clinic)
- Surgery Clinic
- Veterans Affairs Healthcare (e.g. VA Hospital or clinic)

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- Nurse Managed Health Clinics
- Other community health center (e.g.; free clinic)
- Program of All Inclusive Care for the Elderly
- School - based clinic
- State Government Office or Agency
- Tribal Health Department
- Veterans Affairs Hospital or clinic

Other Oral Health Facility
Residential Living Facility
Senior Centers
State Health Department
Tribal Organization

Note: If you select "Other" in Column 3, provide an explanation in the comments field and reference the site name.
EXP-1 - Selecting Type of Setting Where the Site was Located

Select Type of Setting Where the Site was Located: Select whether each site used to train students during the annual reporting period was located in designated settings by clicking on the drop-down menu under Block 2 and choosing all that apply from the following options.

- Medically underserved community
- Primary Care Setting
- Rural area
- None of the above

⚠️ Warning: "None of the above" cannot be selected in combination with any other option.

💡 Note: To determine whether a site is located in a medically underserved community, please visit HRSA’s Office of Shortage Designation at http://datawarehouse.hrsa.gov/GeoAdvisor/ShortageDesignationAdvisor.aspx
Note: To determine whether a site is located in a rural area, please visit HRSA’s Office of Rural Health Policy at http://datawarehouse.hrsa.gov/RuralAdvisor/ruralhealthadvisor.aspx
**EXP-1 - Selecting Type(s) of Partners/Consortia**

<table>
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<th>(5)</th>
</tr>
</thead>
</table>

**Figure 43. EXP-1 - Selecting Type(s) of Partners/Consortia**

**Select Type(s) of Partners/Consortia used to Offer Training at this Site:** Select the type(s) of partnerships or consortia used or established for the purpose of training students at each site during the current reporting period by clicking on the drop-down menu in Column 5 (Block 5) and choosing all that apply from the following options:

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Day and home care programs (i.e. Home Health)
- Federal Government - Department of Defense/Military
- Federal Government - CDC
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Long-term care facility
- Nonprofit organization (non - faith based)
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - Other HRSA Program
- Federal Government - FDA
- Federal Government - Other
- Federally - qualified health center or look - alikes
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nurse managed health clinic
- Physical therapy/Rehabilitation center
- Quality improvement organization
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - AHRQ
- Federal Government - IHS
- Federal Government - Other HHS Agency/Office
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization (faith - based)
- Nursing home
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Warning: You may not select "No partners/consortia used" in combination with any other option.

Note: If you select "Other" in Column 5, provide an explanation in the comments field and reference the site name.
EXP-1 - Selecting Type(s) of Vulnerable Population

Select Type(s) of Vulnerable Population Served at this Site: Select the type(s) of vulnerable populations served at each site used to train individuals during the reporting period by clicking on the drop-down menu in Column 7 (Block 4) and choosing all that apply from the following options:

- Adolescents
- College students
- Individuals with mental illness or substance use disorders
- Migrant workers
- People with disabilities
- Returning war veterans (Iraq or Afghanistan)
- Unemployed
- Victims of abuse or trauma
- Children
- Homeless individuals
- Lesbian/Gay/Bisexual/Transgender
- Military and/or military families
- Pregnant women and infants
- Tribal Population
- Uninsured/Underinsured persons/families
- None of the above
- Chronically ill
- Individuals with HIV/AIDS
- Low income persons/families
- Older adults
- Refugee Adults
- Undocumented Immigrants
- Veterans

**Warning:** You may not select "None of the above" in combination with any other option.
EXP-1 - Entering Site's geographical Data

City: Enter the name of the city where each training site is located by clicking on the textbox under Column 8.

State: Enter the two-letter abbreviation for the state where each training site is located by clicking on the textbox below Column 9.

Zip Code: Enter the zip code (5 digits) where each training site is located by clicking on the textbox under Column 10.

Four Digit Zip Code Extension: Enter the four-digit zip code extension where each training site is located by clicking on the textbox under Column 11.

Note: Four-digit zip code extension information can be accessed at https://tools.usps.com/go/ZipLookupAction_input. Do not enter invalid responses or placeholder entries. If you need assistance when entering the address information for your training sites, contact your Government Project Officer for guidance.

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.
EXP-2: Experiential Characteristics - Trainees by Profession/Discipline

EXP-2 - Selecting Training Program and Site Name

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

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td>(2) Block 1</td>
</tr>
</tbody>
</table>

Figure 46. EXP-2 - Selecting Training Program and Site Name

**Type of Training Program**: Select a training program by clicking on the drop-down menu in Column 1 and choosing a practicum/field placement program.

**Site Name**: Pair the selected training program with a training site by clicking on the drop-down menu in Column 2 (Block 1) and choosing one a site name. The options available will be sites that were marked as "Used" in the current reporting period on EXP-1.

💡 Note: The EXP-2 form will initially appear blank.
**Select Profession and Discipline of Individuals Trained:**

Select the profession/discipline of individuals trained for each training program/site combination by clicking on the drop-down menu in Column 3. Be sure to select the disciplines of your principal trainees as well as any “other interprofessional” trainees who participated in team-based care at the clinical site. Repeat as necessary to identify all profession/discipline of all individuals trained at each site.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Family Medicine
• Medicine - Other
• Medicine - Pediatrics
• Medicine - Plastic Surgery - Integrated
• Medicine - Preventive Medicine/Internal Medicine
• Medicine - Radiation Oncology
• Medicine - Thoracic Surgery
• Medicine - Vascular Surgery - Integrated
• Nursing - CNS - Geropsychiatric
• Nursing - CNS - Psychiatric/Mental health
• Nursing - Licensed practical/vocational nurse (LPN/LVN)
• Nursing - NP - Adult gerontology
• Nursing - NP - Emergency care
• Nursing - NP - Geropsychiatric
• Nursing - NP - Women’s health
• Nursing - Nurse educator
• Nursing - Public health nurse
• Other - Audiology
• Other - Direct Service Worker
• Other - Health Education Specialist
• Other - Medical Assistant
• Other - Midwife (non-nurse)
• Other - Optometry
• Other - Podiatry
• Other - Registered Dietician
• Other - Speech Therapy
• Physician Assistant
• Medicine - Physical Medicine and Rehabilitation
• Medicine - Preventive Medicine
• Medicine - Preventive Medicine/Public Health
• Medicine - Radiology - Diagnostic
• Medicine - Thoracic Surgery - Integrated
• Nursing - CNS - Adult gerontology
• Nursing - CNS - Neonatal
• Nursing - CNS - Women’s health
• Nursing - NP - Acute care adult gerontology
• Nursing - NP - Adult Psychiatric/Mental health
• Nursing - NP - Family
• Nursing - NP - Neonatal
• Nursing - Nurse administrator
• Nursing - Nurse informaticist
• Nursing - Registered Nurse
• Other - Chiropractic
• Other - Facility Administrator
• Other - Health Informatics/Health Information Technology
• Other - Medical Laboratory Technology
• Other - Occupational Therapy
• Other - Pharmacy
• Other - Profession Not Listed
• Other - Respiratory Therapy
• Other - Unknown
• Public Health - Biostatistics
• Public Health - Epidemiology
• Medicine - Psychiatry
• Medicine - Surgery - General
• Medicine - Urology
• Nursing - CNS - Family
• Nursing - CNS - Pediatrics
• Nursing - Home Health Aide
• Nursing - NP - Acute care pediatric
• Nursing - NP - Child/Adolescent Psychiatric/Mental Health
• Nursing - NP - Family Psychiatric/Mental Health
• Nursing - NP - Pediatrics
• Nursing - Nurse anesthetist
• Nursing - Nurse midwife
• Nursing - Researcher/Scientist
• Other - Community Health Worker
• Other - First Responder/EMT
• Other - Lay and Family Caregiver
• Other - Midwife
• Other - Office/Support Staff
• Other - Physical Therapy
• Other - Radiologic technology
• Other - Speech Pathology
• Other - Veterinary Medicine
• Public Health - Disease Prevention & Health Promotion
• Public Health - Health Administration
• Public Health - Injury Control & Prevention
• Student - Alternative/Complementary Nursing
• Student - CNS - Geropsychiatric
• Student - CNS - Psychiatric/Mental health
• Student - Dental Hygiene
• Student - Graduate - Nursing Doctorate
• Student - Graduate - Other Behavioral Health
Health Resources and Services Administration
Bureau of Health Workforce

- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Nutrition
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women’s health
- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Health Informatics
- Student - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - NP - Acute care pediatric
- Student - NP - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
- Student - NP - Other advanced nurse specialists
- Student - Pharmacy School
- Student - Post - high school / Pre - college
- Student - Undergraduate - Other

- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Student - CNS - Family
- Student - CNS - Pediatrics
- Student - Dental Assistant
- Student - Diploma/Certificate
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Home Health Aide
- Student - Medical School
- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Physical Therapy
- Student - Registered nurse (RN)
- Student - Undergraduate - Public Health

Note: Principal trainees are those who were directly or indirectly supported through your grant. For your grant program, these are the individuals reported on the INDGEN form. “Other Interprofessional” trainees are those individuals who trained at the same site on an interdisciplinary team with your principal trainees, but who did not receive support from or have an association with your HRSA grant.
Note: Do not select professions/disciplines for faculty, site staff, or other non-trainees.
**EXTRACTION # Trained in the Profession and Discipline**

**Table 48. EXP-2 - Entering # Trained in the Profession and Discipline**

| Block 3 | (4) |

**Figure 48. EXP-2 - Entering # Trained in the Profession and Discipline**

**Enter # Trained in this Profession and Discipline:**

For each row, enter the number of "Principal" trainees in the profession and discipline listed.

**Note:** Principal trainees are those who were directly or indirectly supported through your grant. For your grant program, these are the individuals reported on the INDGEN form.

**Note:** Do not enter counts for faculty, site staff, or other non-trainees.
### EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

<table>
<thead>
<tr>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5)</td>
</tr>
<tr>
<td>Block 8</td>
</tr>
</tbody>
</table>

#### Figure 49. EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

**Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care:** For each row, enter the number of all "Other Interprofessional" trainees in each profession and discipline listed.

- **Note:** “Other Interprofessional” trainees are those individuals who trained at the same site on an interdisciplinary team with your principal trainees, but who did not received support from or have an association with your HRSA grant.

- **Note:** Do not enter counts for faculty, site staff, or other non-trainees.
### EXP-2 - Adding Individuals Trained Example 1

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Student - Graduate - Psychology</td>
<td>24</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 2</td>
<td>Student - Graduate - Psychology</td>
<td>10</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 3</td>
<td>Student - Graduate - Psychology</td>
<td>4</td>
</tr>
</tbody>
</table>

**Figure 50. EXP-2 - Adding Individuals Trained Example 1**

**Example 1. Principal Trainees ONLY (no interprofessional trainees):** In Example 1, students from the Psychology internship program did not participate in interprofessional experiences, so only principal trainees are being reported. The principal Psychology internship students trained at 3 different clinical training sites.

- At Site 1, there were 24 principal Psychology interns and no “other interprofessional” trainees (see row 1).
- At Site 2, there were 10 principal Psychology interns and no “other interprofessional” trainees (see row 2).
- At Site 3, there were 4 principal Psychology interns and no “other interprofessional” trainees (see row 3).
### EXP-2 - Adding Individuals Trained Example 2

#### Example 2. Principal AND Interprofessional Trainees:
In Example 2, students from the Psychology internship program participated in interprofessional training experiences alongside other trainees.

- At Site 1, 24 principal Psychology interns trained alongside “other interprofessional” trainees: 2 medical students and 3 Psychiatry residents who were not associated with the HRSA grant (see rows 1-3).

- At Site 2, 15 principal Psychology interns trained alongside “other interprofessional” trainees: 4 pharmacy students who were not associated with the HRSA grant (see rows 4 and 5).

---

**Figure 51. EXP-2 - Adding Individuals Trained Example 2**

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Student - Graduate - Psychology</td>
<td>24</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Student - Medical School</td>
<td>0</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Medicine - Psychiatry</td>
<td>0</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 2</td>
<td>Student - Graduate - Psychology</td>
<td>15</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 2</td>
<td>Student - Pharmacy School</td>
<td>0</td>
</tr>
</tbody>
</table>
### EXP-2 - Adding Individuals Trained Example 3

#### Example 3. Principal AND Interprofessional Trainees:

In Example 3, students from the Psychology internship program participated in interprofessional training experiences alongside other trainees, including other Psychology interns who were not associated with the HRSA grant.

- **At Site 1,** 24 principal Psychology interns trained alongside “other interprofessional” trainees: 2 Psychiatry residents and 10 other Psychology interns who were not associated with the HRSA grant (see rows 1 and 2).

- **At Site 2,** 10 principal Psychology interns trained alongside “other interprofessional” trainees: 5 medical students and 22 other Psychology interns who were not associated with the HRSA grant (see rows 3 and 4).

#### Figure 52. EXP-2 - Adding Individuals Trained Example 3

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Student - Graduate - Psychology</td>
<td>24</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 1</td>
<td>Medicine - Psychiatry</td>
<td>0</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 2</td>
<td>Student - Graduate - Psychology</td>
<td>10</td>
</tr>
<tr>
<td>Internship</td>
<td>Student - Graduate - Psychology</td>
<td>Site 2</td>
<td>Student – Medical School</td>
<td>0</td>
</tr>
</tbody>
</table>
**EXP-2 - Selecting Type of Site Used**

Select Type of Site Used: Following the selection of a training site in EXP-1, the associated type of site will be automatically populated when the save and validate button is selected.

Figure 53. EXP-2 - Selecting Type of Site Used
**EXP-2 - Selecting Type of Setting Where the Site was Located**

<table>
<thead>
<tr>
<th>Select Type of Setting Where the Site was Located</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
</tr>
</tbody>
</table>

**Figure 54. EXP-2 - Selecting Type of Setting Where the Site was Located**

**Select Type of Setting Where the Site was Located:** Following the selection of a training site in EXP-1, the associated settings will be automatically populated when the save and validate button is selected.

💡

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

CDE - Introduction

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

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

Order of Forms:

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

Pre-population of Prior Records:

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

Creation of New Records:

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

Detailed guidance on how to make the correct selections for the CDE forms be found below.

⚠️ Warning: CDE-1 must be completed and validated prior to beginning CDE-2. If you reach the CDE-2 form, and no drop-down selections appear, you have not validated both CDE-1 subform.
CDE-1: Course Development and Enhancement - Course Information

CDE-1 - Setup

To provide data about courses and other training activities that have been developed or enhanced through the grant or to provide updates about previously reported activities (those that have not yet been implemented), click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.

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

**Figure 55. CDE-1 - Setup**

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

⚠️ Warning: CDE-1 must be completed and validated prior to beginning CDE-2. If you reach the CDE-2 form, and no drop-down selections appear, you have not validated the CDE-1 subform.
CDE-1 - Entering the Name of Course/Training Activity

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

![Add Course](image)

Figure 56. CDE-1 - Entering the Name of Course/Training Activity

Name of Course or Training Activity:

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

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

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

- Academic course
- Continuing Education courses
- Field placement/practicum
- Training/Workshop for health professions students fellows or residents
- Clinical rotation
- Faculty development programs or activities
- Grand rounds

Figure 57. CDE-1 - Selecting Type of Course or Training Activity
CDE-1 - Selecting whether Course was Newly Developed or Enhanced

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

- Enhanced
- Newly developed

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

**Note:** Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Select Status of Development or Enhancements: Select each course or training activity's current status by clicking on the drop-down menu in Column 4 (Block 4) and choosing one of the following options:

- Developed not yet implemented
- Implemented
- Under development
### Select Delivery Mode Used to Offer this Course or Training Activity

<table>
<thead>
<tr>
<th>Block 6</th>
<th>(8)</th>
</tr>
</thead>
</table>

**Select Delivery Mode Used to Offer this Course or Training Activity:** Select the primary mode used to deliver each course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu in Column 8 (Block 6) and choosing one of the following options:

- Classroom-based
- Distance learning (Online Webinar)
- Hybrid
- Clinical Rotation
- Experiential/Field-based
- Simulation-based Training
### Select Primary Topic Area:

Select the primary topic area for each course or training activity that was developed or enhanced by clicking on the drop-down menu under Column 11 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed
- Behavioral Health - Substance Abuse - General
- Behavioral Health - Treatment
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
- Behavioral Health - Substance Abuse - Opioids
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
Note: You may only choose one selection for primary topic area.
CDE-1 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

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

Select whether the course or training activity that was developed or enhanced has been offered, re-offered or not offered in the current reporting period by clicking on the drop-down menu under Column 12. Listed below is guidance on which option to select.

- For “Prior Records”, courses that have been ‘Implemented’ the available options will include:
  - Not offered in the current reporting period; or
  - Re-offered in the current reporting period

- For “Prior Records”, courses that have been ‘Developed not yet implemented’ or ‘Under development’ the available options will include:
  - Not offered in the current reporting period; or
  - Offered in the current reporting period. Select “offered” if this is the first time the course has been implemented.

- For “New Records”, courses that have been ‘Implemented’, the available option will be:
  - Offered in the current reporting period.

- For “New Records”, courses that are ‘Developed not yet implemented’ or ‘Under development’, the available option will be:
  - Not offered in the current reporting period.
  - Offered
  - Not Offered
  - Re-offered

Note: Information on courses that were ‘Offered’ or ‘Re-offered’ will carry over onto CDE-2 form.
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
CDE-2: Course Development and Enhancement - Trainees by Profession/Discipline

CDE-2 - Adding Courses and Profession/Disciplines

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

*Add Profession/Discipline

<table>
<thead>
<tr>
<th>Name of Course or Training Activity</th>
<th>Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
</table>

Add Record

Figure 63. CDE-2 - Adding Courses and Profession/Disciplines

Name of Course or Training Activity:

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

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

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Behavioral Health - Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Aerospace Medicine
Mental and Behavioral Health Education and Training

- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Medicine - Thoracic Surgery - Integrated
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Dentistry - Radiology Dentistry
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- Medicine - Urology
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse Assistant/Patient Care Associate (PCA)
- Nursing - Nurse midwife
Health Resources and Services Administration
Bureau of Health Workforce

Mental and Behavioral Health Education and Training

• Nursing - Nurse anesthetist
• Nursing - Nurse informaticist
• Nursing - Public health nurse
• Other - Chiropractor
• Other - First Responder/EMT
• Other - Medical Assistant
• Other - Optometry
• Other - Profession Not Listed
• Other - Veterinary Medicine
• Public Health - Biostatistics
• Public Health - Epidemiology
• Public Health - Injury Control & Prevention
• Student - Chiropractic School
• Student - Alternative/Complementary Nursing
• Student - CNS - Family
• Student - CNS - Pediatrics
• Student - CNS - Women’s health and pediatrics
• Student - Dental Hygiene
• Student - Graduate - Allied Health
• Student - Graduate - Nursing Masters
• Student - Graduate - Psychology
• Student - Graduate - Social Work
• Student - Licensed Practical/Vocational Nurse (LPN/LVN)
• Student - Midwife (non - nurse)
• Student - NP - Adult
• Student - NP - Child/Adolescent Psychiatric/Mental Health
• Student - NP - Family Psychiatric/Mental Health
• Nursing - Registered Nurse
• Other - Community Health Worker
• Other - Health Education Specialist
• Other - Nutritionist
• Other - Pharmacy
• Other - Respiratory Therapy
• Other – Home Health Aide
• Public Health - Disease Prevention & Health Promotion
• Public Health - Health Policy & Management
• Public Health - Social & Behavioral Sciences
• Student - Podiatry School
• Student - CNL - Generalist
• Student - CNS - Geropsychiatric
• Student - CNS - Psychiatric/Mental health
• Student - Community Health Nursing
• Student - Dental School
• Student - Graduate - Clinical Laboratory Services
• Student - Graduate - Other
• Student - Graduate - Public Health
• Student - Home Health Aide
• Student - Medical Assistant
• Student - NP - Acute care adult gerontology
• Student - NP - Adult gerontology
• Student - NP - Emergency care
• Student - NP - Geropsychiatric
• Student - NP - Pediatrics

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• Other - Health Informatics/Health Information Technology
• Other - Office/Support Staff
• Other - Podiatry
• Other - Unknown
• Physician Assistant
• Public Health - Environmental Health
• Public Health - Infectious Disease Control
• Student - Certified Nursing Assistant
• Student - 9 - 12 (secondary)
• Student - CNS - Adult gerontology
• Student - CNS - Neonatal
• Student - CNS - Women’s health
• Student - Dental Assistant
• Student - Diploma/Certificate
• Student - Graduate - Nursing Doctorate
• Student - Graduate - Other Behavioral Health
• Student - Graduate - Radiological Assistant
• Student - K - 8 (primary)
• Student - Medical School
• Student - NP - Acute care pediatric
• Student - NP - Adult Psychiatric/Mental health
• Student - NP - Family
• Student - NP - Neonatal
• Student - NP - Psychiatric/Mental health
• Student - Nurse Anesthetist
• Student - Nurse Researchers/Scientists
• Student - Optometry
• Student - Physician Assistant
• Student - Registered nurse (RN)
• Student - Speech Therapy
- Student - NP - Other advanced nurse specialists
- Student - NP - Women’s health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Pharmacy School
- Student - Post - high school / Pre - college
- Student - Registered Nurse - BSN
- Student - Undergraduate - Allied Health
- Student - Undergraduate - Public Health
- Student - Unknown

- Student - Nurse Administrator
- Student - Nurse Midwife
- Student - Occupational Therapy
- Student - Physical Therapy
- Student - Public Health Nurse
- Student - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant

Note: CDE-2 is used to report trainee counts for academic courses, training workshops, grand rounds, clinical rotations, and field placement/practica that were offered during the annual reporting period. Trainee counts for faculty development participants are captured separately with the FD-subforms and continuing education participants are reported with the CE subforms.

Note: Only the names of courses/training activities that were marked as “Offered” or “Re-offered” in the CDE-1 form will appear as options in the drop-down menu.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter # Trained in this Profession and Discipline:

For each course, enter the number of participants from the professions/disciplines you have indicated under Column 3 (Block 7). Repeat this process to capture the profession and discipline of all individuals trained in each course or training activity during the current reporting period.

Once you have completed Columns 1 through 3 for all rows, click ‘Save and Validate’ to automatically populate Columns 4 through 9 with responses from CDE-1.
Select Type of Course or Training Activity:

Column 4 (Block 2), Type of Course or Training Activity will automatically populate with response from CDE-1 form.
### CDE-2 - Selecting whether Course was Newly Developed or Enhanced

<table>
<thead>
<tr>
<th>Select whether Course or Training Activity was Newly Developed or Enhanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5) Block 3</td>
</tr>
</tbody>
</table>

**Figure 66. CDE-2 - Selecting whether Course was Newly Developed or Enhanced**

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

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

- **Note:** Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.
CDE-2 - Selecting Delivery Mode

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

Column 7 (Block 6), Delivery mode will automatically populate with response from CDE-1 form.
Select Primary Topic Area:

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

<table>
<thead>
<tr>
<th>Select Whether the Course or Training Activity was Offered in the Current Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>(9)</td>
</tr>
</tbody>
</table>

Figure 69. CDE-2 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

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

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

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

CE - Introduction

⚠️ Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

1. Purpose: The CE subforms are used to characterize continuing education course characteristics as well as the number and profession/discipline of trainees.

   - The CE-1 form captures information about the continuing education courses and training activities offered in the current reporting period.
   - The CE-2 subform collects information about the profession and discipline of individuals trained in the offered CE courses or training activities.

2. Order of Subforms:

   - CE subforms MUST be completed in order, otherwise drop-down menus will not prepopulate correctly.
   - You must complete and ‘Save and Validate’ CE-1 first before proceeding to CE-2.

3. Pre-population of Prior Records (CE Courses) reported previously:

   - The BPMH system will no longer prepopulate data into the CE-1 subform.
   - Each reporting period, the CE-1 form will appear blank.
   - The ONLY courses or activities to be entered are those that were offered during the current reporting period.
   - To view data submitted in the previous reporting period, click on the "View Prior Data” link.
**CE-1: Continuing Education - Course Characteristics and Content**

**CE-1 - Setup**

![Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.](image)

Figure 70. CE-1 - Setup

- To provide data about continuing education courses offered during the reporting period, click "Yes" to the initial setup question.
- Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.
**Warning:** Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

**Course Title:** Enter the name of each Continuing Education course or activity offered during the reporting period by typing the name in the textbox in Column 1 (Block 1).

*Note: Course titles are limited to 200 characters.*
Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

Select Whether Course is Approved for Continuing Education Credit: Select whether each course was approved for continuing education credit by clicking on the drop-down menu in Column 2 (Block 2) and choosing one of the following options:

- Yes
- No

Reference: Refer to the glossary for a definition of continuing education course accreditation.
Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

Enter the Duration of the Course in Clock Hours:

<table>
<thead>
<tr>
<th>Block 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3)</td>
</tr>
</tbody>
</table>

Figure 73. CE-1 - Entering Course Duration

**Enter the Duration of the Course in Clock Hours:** Enter the duration, in clock hours, of each course offered during the current reporting period in the textbox under Column 3 (Block 3).

**Note:** For courses that lasted for less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60 (e.g., a 15-minute course would entered as 15/60 = .25).

**Note:** For instructional activities offered via distance learning, enter the **intended duration** of each activity in Column 3 (Block 3).
CE-1 - Entering # of Times Course was Offered

Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

Enter # of Times Course was Offered

Figure 74. CE-1 - Entering # of Times Course was Offered

Enter # of Times Course was Offered: Enter the total number of times the course was offered during the annual reporting period in the textbox in Column 4 (Block 4).

Note: For instructional activities offered via distance learning on an ongoing basis, enter 999.
Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

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

- Archived/Self-paced Distance Learning
- Classroom-based
- Hybrid
- Real-time/Live distance learning
CE-1 - Selecting Type(s) of Partnership(s)

Warning: Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

Select Type(s) of Partnership(s) Established for the Purposes of Delivering this Course:

Select the type(s) of partnerships or consortia established for the purposes of offering each course during the annual reporting period by clicking on the drop-down menu in Column 6 (Block 6) and choosing all that apply from the following options:

- Academic department - outside the institution
- Alzheimer’s Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Day and home care programs (i.e. Home Health)
- Federal Government - AHRQ
- Federal Government - IHS
- Federal Government - Other HHS Agency/Office
- Federal Government - Veterans Affairs
- Geriatric Behavioral or Mental Health Units
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Academic department - within the institution
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - CDC
- Federal Government - NIH
- Federal Government - Other HRSA Program
- FQHC or look-alike
- Geriatric consultation services
- Health department - Tribal
- Health policy center
- Local Government
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - ACL
- Federal Government - FDA
- Federal Government - Other
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health department - Local
- Health disparities research center
- Hospice
- Long - Term Care Facility
- Nonprofit organization (non - faith based)
Mental and Behavioral Health Education and Training

- Nurse Managed Health Clinics
- Private/For-profit organization
- Senior Center
- Veterans Affairs Healthcare (e.g. VA hospital)

- Nonprofit organization (faith-based)
- Nursing Home
- Professional Associations
- State Governmental Programs
- N/A

Warning: You may not select "No partners/consortia used" in combination with any other option.
### CE-1 - Entering Employment Location Data for Individuals Trained

**Warning:** Attention Users- Important changes have occurred with the CE-1 subform! Please read the following directions carefully.

<table>
<thead>
<tr>
<th>Select Whether Employment Location Data are Available for Individuals Trained</th>
<th>Enter # of Individuals Trained by Employment Location (not mutually exclusive)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary Care Setting</td>
</tr>
<tr>
<td>(8) Block 9</td>
<td>(9) Block 9a</td>
</tr>
</tbody>
</table>

#### Figure 77. CE-1 - Entering Employment Location Data for Individuals Trained

**Select Whether Employment Location Data are Available for Individuals Trained:** Select whether employment location data are available for trainees who participated in each course during the annual reporting period by clicking on the drop-down menu under Block 9 and choosing one of the following options:

- Yes
- No

**Enter # of Individuals Trained by Employment Location (not mutually exclusive): Primary Care Setting:**

- If Yes, In Column 9 (Block 9a), enter the number of individuals who are employed in a primary care setting
- If No, Then Type “N/A” for Columns 9(Block 9a).

**Enter # of Individuals Trained by Employment Location (not mutually exclusive): Medically Underserved Community:**
If Yes, In Column 10 (Block 9b), enter the number of individuals who are employed in a medically-underserved community
If No, Then Type “N/A” for Column 10 (Block 9b).

Enter # of Individuals Trained by Employment Location (not mutually exclusive): Rural Area:

If Yes, In Column 11 (Block 9c), enter the number of individuals who are employed in a primary care setting
If No, Then Type “N/A” for Column 11 (Block 9c).

Note: Individuals can be counted multiple times if their place of employment is located in more than one type of designated setting. As a result, counts provided under Blocks 9a, 9b and 9c are not meant to be mutually exclusive.
Select the Course's Primary Topic Area: Select the primary topic area addressed in each course offered during the annual reporting period by clicking on the drop-down menu in Column 12 (Block 11) and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Behavioral Health - Substance Abuse - General
- Behavioral Health - Treatment
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Behavioral Health - Substance Abuse - Opioids
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
Mental and Behavioral Health Education and Training

- Setting - Primary Care
- Setting - Rural
- Setting - Other

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

CE-2 - Selecting Profession and Discipline of Individuals Trained

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Select Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Block 1</td>
<td>(2) Block 8</td>
</tr>
</tbody>
</table>

Figure 79. CE-2 - Selecting Profession and Discipline of Individuals Trained

Course Title: Select course title from one of the available options in Column 1 (Block 1)

Select Profession and Discipline of Individuals Trained: For each course title, select the profession and discipline of students or fellows trained at each site during the annual reporting period by clicking on the drop-down menu in Column 2 (Block 8) and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medical Interpreter
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine

- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Other

- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Otolaryngology
Health Resources and Services Administration
Bureau of Health Workforce

- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- Medicine - Urology
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Audiology
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Midwife (non-nurse)
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractic
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Medical Laboratory Technology
- Other - Occupational Therapy
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Other - Unknown
- Public Health - Biostatistics

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- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Medicine - Thoracic Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Midwife
- Other - Office/Support Staff
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Pathology
- Other - Veterinary Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Administration
- Public Health - Injury Control & Prevention
- Public Health - Social & Behavioral Sciences
- Other - Speech Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Nutrition
- Public Health - Epidemiology
- Public Health - Infectious Disease Control
- Public Health - Other
CE-2 - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline: Enter the number of trainees in each profession and discipline in the textbox in Column 3 (Block 8).

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, click on the "Submit" button in the left hand side of the EHB to begin the submission process of your PRGCA.
Printing Your Performance Report

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

Figure 81. Screenshot of Printing 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]

Figure 82. 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.

Figure 83. 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, 2017 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, 2016 - June 30, 2017.

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 http://bhw.hrsa.gov/grants/reporting/index.html.

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 http://bhw.hrsa.gov/grants/reporting/index.html.

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?**
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.