Instruction Manual for Grantees of the Area Health Education Centers

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 AHEC grant program:
   - Health careers recruitment of underrepresented minority populations or individuals from disadvantaged or rural backgrounds;
   - Community-based clinical training and education with emphasis on primary care;
   - Continuing education; and
   - Public health careers exposure to youth.

2. Data submitted by grantees of the program must cover all activities that took place between July 01, 2018 - June 30, 2019 (Referred to as Annual Performance Report).

3. The PRGCA is due no later than July 31, 2019. Failure to submit a PRGCA by this date may place your grant in a noncompliant status.

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

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

The Office of Management and Budget (OMB) has issued a 3-year approval for the annual collection of performance measures across all grants and cooperative agreements funded through the Health Resources and Services Administration's Bureau of Health Workforces (BHW) (OMB # 0915-0061; Expiration Date: 03/31/2022). 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

<table>
<thead>
<tr>
<th>No.</th>
<th>Type of Training Program</th>
<th>Trainees by Training Category</th>
<th>Attrition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Enter # of Enrollees</td>
<td>Enter # of Graduates</td>
</tr>
<tr>
<td>1</td>
<td>Degree/Diploma MD/MPH Health Policy &amp; Management</td>
<td>20</td>
<td>5</td>
</tr>
</tbody>
</table>

Figure 2. Example of Performance Measures Data Table

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:
   - View Prior Period Data- Previously submitted PRGCA data are available in read-only mode
   - Glossary- Current definitions of key terms
   - 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](http://bhw.hrsa.gov/grants/reporting/index.html).
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>SetupForms</td>
<td>Grant Purpose</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Setup Form</td>
<td>SetupForms</td>
<td>Training Program</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSSubforms</td>
<td>PC-1</td>
<td>AHEC-6</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSSubforms</td>
<td>PC-2</td>
<td>AHEC-1,AHEC-4</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSSubforms</td>
<td>PC-3</td>
<td>AHEC-1,AHEC-4</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSSubforms</td>
<td>PC-7</td>
<td>AHEC-2</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>LR-1a</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>LR-2</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-1</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</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>
<td>---------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>10</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-2</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</td>
</tr>
<tr>
<td>11</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-3</td>
<td>AHEC-1,AHEC-2,AHEC-4,AHEC-6</td>
</tr>
<tr>
<td>12</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>IND-GEN</td>
<td>AHEC-6</td>
</tr>
<tr>
<td>13</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>INDGEN-PY</td>
<td>AHEC-6</td>
</tr>
<tr>
<td>14</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-1</td>
<td>AHEC-2,AHEC-6</td>
</tr>
<tr>
<td>15</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-2</td>
<td>AHEC-2,AHEC-6</td>
</tr>
<tr>
<td>16</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESubforms</td>
<td>CDE-1</td>
<td>AHEC-5</td>
</tr>
<tr>
<td>17</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESubforms</td>
<td>CDE-2</td>
<td>AHEC-5</td>
</tr>
<tr>
<td>18</td>
<td>Performance Data Form</td>
<td>ContinuingEducationActivities-CESubforms</td>
<td>CE-1</td>
<td>AHEC-3</td>
</tr>
<tr>
<td>19</td>
<td>Performance Data Form</td>
<td>ContinuingEducationActivities-CESubforms</td>
<td>CE-2</td>
<td>AHEC-3</td>
</tr>
</tbody>
</table>
Setup Forms

Setup Forms - Introduction
Grant Purpose – Setup
Selecting Grant Purpose(s)

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

<table>
<thead>
<tr>
<th>Grant Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>AHEC-1: Health careers recruitment of underrepresented minority populations or individuals from disadvantaged or rural backgrounds</td>
</tr>
<tr>
<td>AHEC-2: Community-based training and education with emphasis on primary care</td>
</tr>
<tr>
<td>AHEC-3: Continuing education</td>
</tr>
<tr>
<td>AHEC-4: Public health careers exposure to youth</td>
</tr>
<tr>
<td>AHEC-5: Curriculum Development and Enhancement</td>
</tr>
<tr>
<td>AHEC-6: Active AHEC Scholar Program with participants</td>
</tr>
</tbody>
</table>

Figure 3. Selecting Grant Purpose(s)

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 reporting period (July 01, 2018 - June 30, 2019). Some options in the Grant Purpose form will be automatically selected based on information provided in a previous reporting period.

AHEC-1: Health careers recruitment of underrepresented minority populations or individuals from disadvantaged or rural backgrounds:

AHEC-2: Community-based training and education with emphasis on primary care:

AHEC-3: Continuing education:

AHEC-4: Public health careers exposure to youth:
AHEC-5: Curriculum Development and Enhancement:

AHEC-6: Active AHEC Scholar Program with participants:

⚠️ Warning: 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.

💡 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

*Add Training Program

Select Type of Training Program Offered
(Click the ‘Load Program Details' button after selecting your training program)

Load Program Details

Add Record

Figure 4. Training Program Setup - Selecting Type of Training Program

Select Type of Training Program Offered:

Select the type(s) of training program(s) supported through the grant during the reporting period by clicking on the drop-down menu and choosing one of the options from the list below:

- Degree/Diploma/Certificate Academic Training Program (Degree/Diploma)
- Non-degree structured training program (Structured)
- Non-degree unstructured training program (Unstructured)
- Practicum/Field Placement program

Note: Previously reported training programs (i.e., prior records) will prepopulate in the “Saved Programs” table. If you have no NEW training programs to add, proceed to the instructions in the final step.
Note: The Training Program Setup form will configure all subsequent subforms specific to structured programs, unstructured programs, and practica/field placements (depending on your grant).
Click on the “Load Program Details” button to activate the remaining drop-down menus in this setup form.
For a Non-degree bearing Structured or Unstructured Training Program, Select Type of Training Activity:

Select the type of training activity by clicking on the drop-down menu and choosing one of the following options:

- Health Careers Enrichment Activities
- Pre-Diploma/Certification Preparation
- Summer Program
- Training activity for current health profession students residents and/or fellows

For a Non-degree bearing Structured or Unstructured Training Program, Enter Name of Training Activity:

Enter a name for the activity selected in the previous step and click on the "Add Record" button to save your entry. Repeat these steps as necessary until all structured training programs are present.
**Training Program Setup - Adding Unstructured Training Program**

<table>
<thead>
<tr>
<th>*Add Training Program</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>For a Non-degree bearing Structured or Unstructured Training Program, Select Type of Training Activity</td>
<td></td>
</tr>
<tr>
<td>For a Non-degree bearing Structured or Unstructured Training Program, Enter Name of Training Activity</td>
<td></td>
</tr>
</tbody>
</table>

**Add Record**

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

**For a Non-degree bearing Structured or Unstructured Training Program, Select Type of Training Activity:**

Select the type of training activity by clicking on the drop-down menu and choosing one of the following options:

- Afterschool Enrichment Activity
- Community-based outreach & education
- Pre-Diploma/Certification Preparation
- College Academic Support
- Pre-college Preparation
- Training activity for current health profession students residents and/or fellows

**For a Non-degree bearing Structured or Unstructured Training Program, Enter Name of Training Activity:**

Enter a name for the activity selected in the previous step and click on the "Add Record" button to save your entry. Repeat these steps as necessary until all unstructured training programs are present.
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 8. 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 participating in community-based practica/field placements by clicking on the drop-down menu and choosing one of the options below. Next, click on the "Add Record" button to save your entry. Repeat these steps to list all practica/field placement programs offered 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
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Home Health Aide
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Social Work or Substance Abuse/Addictions Counseling
- Behavioral Health - 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 - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
Area Health Education Centers

- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- 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 - Child/Adolescent Psychiatric/Mental Health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Community Health Worker
- Other - First Responder/EMT
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- 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 - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Audiology
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Midwife (non - nurse)
- Other - Office/Support Staff
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Registered Dietician
- Other - Speech Pathology
<table>
<thead>
<tr>
<th>Area Health Education Centers</th>
<th>Annual Performance Report Academic Year 2018-2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Other - Lay and Family Caregiver</td>
<td>• Other - Nutritionist</td>
</tr>
<tr>
<td>• Other - Midwife</td>
<td>• Other - Optometry</td>
</tr>
<tr>
<td>• Other - Occupational Therapy</td>
<td>• Other - Physical Therapy</td>
</tr>
<tr>
<td>• Other - Other</td>
<td>• Other - Radiologic Technology</td>
</tr>
<tr>
<td>• Other - Podiatry</td>
<td>• Other - Research</td>
</tr>
<tr>
<td>• Other - Recreational Therapy</td>
<td>• Other - Speech Therapy</td>
</tr>
<tr>
<td>• Other - Respiratory Therapy</td>
<td>• Public Health - Biostatistics</td>
</tr>
<tr>
<td>• Other - Veterinary Medicine</td>
<td>• Public Health - Epidemiology</td>
</tr>
<tr>
<td>• Public Health - Disease Prevention &amp; Health Promotion</td>
<td>• Public Health - Infectious Disease Control</td>
</tr>
<tr>
<td>• Public Health - Health Administration</td>
<td>• Public Health - Social &amp; Behavioral Sciences</td>
</tr>
<tr>
<td>• Public Health - Injury Control &amp; Prevention</td>
<td>• Student - Chiropractic School</td>
</tr>
<tr>
<td>• Student - Alternative/Complementary Nursing</td>
<td>• Student - CNS - Family</td>
</tr>
<tr>
<td>• Student - CNL - Generalist</td>
<td>• Student - CNS - Pediatrics</td>
</tr>
<tr>
<td>• Student - CNS - Geropsychiatric</td>
<td>• Student - CNS - Women's health and pediatrics</td>
</tr>
<tr>
<td>• Student - CNS - Psychiatric/Mental health</td>
<td>• Student - Dental Assistant</td>
</tr>
<tr>
<td>• Student - Community health nursing</td>
<td>• Student - Dietician</td>
</tr>
<tr>
<td>• Student - Dental Hygiene</td>
<td>• Student - Graduate - Allied Health</td>
</tr>
<tr>
<td>• Student - Diploma/Certificate</td>
<td>• Student - Graduate - Health Sciences</td>
</tr>
<tr>
<td>• Student - Graduate - Behavioral Health</td>
<td>• Student - Graduate - Nursing Masters</td>
</tr>
<tr>
<td>• Student - Graduate - Nursing</td>
<td>• Student - Graduate - Psychology</td>
</tr>
<tr>
<td>• Student - Graduate - Other</td>
<td>• Student - Graduate - Social Work</td>
</tr>
<tr>
<td>• Student - Graduate - Public Health</td>
<td>• Student - Licensed Nursing Assistant</td>
</tr>
<tr>
<td>• Student - Health Information Technician</td>
<td>• Student - Midwife (non - nurse)</td>
</tr>
<tr>
<td>• Student - Medical Assistant</td>
<td>• Student - NP - Adult</td>
</tr>
<tr>
<td>• Student - NP - Acute care adult gerontology</td>
<td>• Student - NP - Child/Adolescent Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Physician Assistant</td>
<td>• Student - NP - Family Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Public Health - Environmental Health</td>
<td>• Student - NP - Other advanced nurse specialists</td>
</tr>
</tbody>
</table>
Area Health Education Centers

Health Resources and Services Administration
Bureau of Health Workforce

- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Nurse Administrator
- Student - Nurse midwife
- Student - Nursing - Nurse midwife
- Student - Nursing BS/BSN Completion
- Student - Optometry
- Student - Pharmacy School
- Student - Physical Therapy Assistant
- Student - Post - high school / Pre - college
- Student - Rehabilitation Therapy
- Student - Undergraduate - Dental Therapy
- Student - Undergraduate - Public Health
- Student - Allied Health
- Student - Speech Therapy

- Student - Physician Assistant
- Student - Public Health Nurse
- Student - Undergraduate - Allied Health
- Student - Undergraduate - Health Sciences Program
- Student - Undergraduate - Radiological Assistant
- Student - Occupational Therapy

Note: Student disciplines begin with the student prefix (e.g., Student- Medical School). Advanced trainee disciplines (e.g., residents and fellows) begin with profession identifiers (e.g., Medicine- Dermatology).

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Academic Year 2018-2019

- Student - NP - Women's health
- Student - Nurse Educator
- Student - Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Nursing Assistant/ Aide
- Student - Nursing Pre-licensure
- Student - Pharmacy
- Student - Phlebotomy Technician
- Student - Podiatry School
- Student - Registered nurse (RN)
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician
- Student - Physical Therapy

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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 reporting period (i.e., June 30, 2019) by choosing one of the options listed below.

- Active
- Complete
- Inactive
- Ongoing

Note: For **Structured and Unstructured** Training Programs, choose either Ongoing or Complete:

- **Ongoing**: A structured or unstructured training program that did not conclude by June 30, 2019.
- **Complete**: A structured or unstructured training program that concluded at some point during the reporting period (i.e. July 01, 2018 - June 30, 2019).

Note: For **Practica/Field Placement Programs**, chose either Active or Inactive:

- **Active**: A training program that was offered during the reporting period. If you are reporting any activity for a program, select Active.
- **Inactive**: A training program that was NOT offered during the reporting period. Selecting ‘Inactive’ indicates that the training program is completed and was not offered in the reporting period. You will not report on any aspect of an inactive program, and all records associated with the program (i.e., EXP or 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.
Program Characteristics—PC Subforms

PC Subforms - Introduction
PC-1: Program Characteristics - Degree/Diploma/Certificate Training Programs

PC-1 - Selecting Type(s) of Partners/Consortia

Select Type(s) of Partners/Consortia Used to Offer this Training: For all records, select the type(s) of partnerships and/or consortia used or established for the purpose of offering each degree program during the annual reporting period by clicking on the drop-down menu under Block 2 and choosing all that apply from the following options:

- Academic department - outside the institution
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government -Other
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Alzheimer's Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HRSA Program
- Federally-qualified health center or look-alikes
- Geriatric consultation services
- Health department - State
- Health policy center
- Local Government
- Health Insurance/Healthcare Provider Group (e.g., PPO/HMO)
- Alzheimer's Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Day and home care programs (i.e. Home Health)
- Federal Government - ACL
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Hospice
- Long-term care facility
Warning: You may not select "No partners/consortia used" 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.
PC-2: Program Characteristics – Non-degree bearing Unstructured Training Programs

PC-2 - Selecting Education Level(s) of Participants

Select Education Level(s) of Participants: Select the education level(s) of participants who participated in each unstructured training program during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- 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
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- 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 - Plastic Surgery
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work/Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family 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 - Integrated
- Medicine - Preventive Medicine/Internal Medicine
Area Health Education Centers

- Medicine - Occupational Medicine
- Medicine - Other
- 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 - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Occupational Therapy
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Veterinary Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Office/Support Staff
- Other - Physical Therapy
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Environmental Health
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Student - Alternative/Complementary Nursing
- Student - CNL - Generalist
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Community Health Nursing
- Student - Dental School
- Student - Graduate - Clinical Laboratory Services
Area Health Education Centers

- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Student - Certified Nursing Assistant
- 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 - Women’s health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Pharmacy School
- Student - Podiatry School
- Student - Registered nurse (RN)
- Student - Undergraduate - Allied Health
- Public Health - Infectious Disease Control
- Student - 9 - 12 (secondary)
- Student - Chiropractic School
- 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
- Student - NP - Other advanced nurse specialists
- Student - Nurse Administrator
- Student - Nurse midwife
- Student - Occupational Therapy
- Student - Physical Therapy
- Student - Post-high school / Pre-college
- Student - Rehabilitation Therapy
- 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
- Student - Nurse Anesthetist
- Student - Nurse Researchers/Scientists
- Student - Optometry
- Student - Physician Assistant
- Student - Public Health Nurse
- Student - Speech Therapy
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician
Area Health Education Centers

- Student - Undergraduate - Public Health
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant

Note: Student disciplines begin with the student prefix (e.g., Student- Medical School). Advanced trainee disciplines (residents and fellows) begin with profession identifiers (e.g., Medicine- Dermatology).
Enter Length of Training Activity in Clock Hours:

Enter the duration, in clock hours, of each unstructured training program during the current reporting period by clicking on the drop-down menu in Column 5 (Block 1c).

Note: For training programs 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).
**Select Type(s) of Partners/Consortia Used to Offer this Training**

Select the type(s) of partnerships or consortia established for the purposes of offering each unstructured training program during the current reporting period by clicking on the drop-down menu in Column 6 (Block 2) and choosing all that apply from the following options:

- Academic department - outside the institution
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Academic department - within the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HRSA Program
- FQHC or look-alike
- 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
- Academic 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 - ACL
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization (faith - based)
Health Resources and Services Administration  
Bureau of Health Workforce  

- Long-term care facility  
- Nonprofit organization (non-faith based)  
- Other  
- Professional Associations  
- State Government  
- Tribal Organization  

- State Governmental Programs  

Warning: You may not select "No partners/consortia used" in combination with any other option.
Select Type of Community-based Collaborator(s): Select the type(s) of community-based collaborators used or established to offer each program by clicking on the drop-down menu and choosing all that apply from the following options:

- Area Health Education Center
- Community Mental Health Center
- Federally-qualified health center or look-alikes
- Rural Health Clinic
- Community Health Center
- Critical Access Hospital
- Other Community-Based Organization
- N/A

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.
**PC-3: Program Characteristics – Non-degree bearing Structured Training Programs**

**PC-3 - Selecting Education Level(s) of Participants**

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<th>Subject</th>
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<td>Behavioral Health - Marriage and Family Therapy</td>
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<td>Area Health Education Centers</td>
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<td><strong>Health Resources and Services Administration</strong></td>
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<td><strong>Bureau of Health Workforce</strong></td>
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<td><strong>Academic Year 2018-2019</strong></td>
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</tbody>
</table>

- Medicine - Occupational Medicine
- Medicine - Other
- 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 - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Occupational Therapy
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Veterinary Medicine

- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Office/Support Staff
- Other - Physical Therapy
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Student - Alternative/Complementary Nursing
- Student - CNL - Generalist
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Community Health Nursing
- Student - Dental School
- Student - Graduate - Clinical Laboratory Services
Area Health Education Centers

- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Student - Certified Nursing Assistant
- 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 Psychiatry/Mental health
- Student - NP - Family Psychiatry/Mental health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Pharmacy School
- Student - Podiatry School
- Student - Registered nurse (RN)
- Student - Undergraduate - Allied Health
- Public Health - Infectious Disease Control
- Student - 9 - 12 (secondary)
- Student - Chiropractic School
- 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
- Student - NP - Other advanced nurse specialists
- Student - Nurse Administrator
- Student - Nurse midwife
- Student - Occupational Therapy
- Student - Physical Therapy
- Student - Post-high school / Pre-college
- Student - Rehabilitation Therapy
- 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
- Student - Nurse Anesthetist
- Student - Nurse Researchers/Scientists
- Student - Optometry
- Student - Physician Assistant
- Student - Public Health Nurse
- Student - Speech Therapy
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician
Area Health Education Centers

Health Resources and Services Administration
Bureau of Health Workforce

- Student - Undergraduate - Public Health
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant

Note: Student disciplines begin with the student prefix (e.g., Student - Medical School). Advanced trainee disciplines (residents and fellows) begin with profession identifiers (e.g., Medicine - Dermatology).
Enter Length of Training Program in Clock Hours

Figure 16. PC-3 - Entering Length of Training Program

Enter Length of Training Program in Clock Hours: Enter the duration, in clock hours, of each structured training program during the current reporting period by clicking on the drop-down menu in Column 5 (Block 1f).

Note: For training programs 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).
PC-3 - Selecting Whether Public Health Careers Content Was Offered

Select Whether Public Health Careers Content Was Offered:

In Column 6, select whether public health careers content was offered as a part of the structured training program.

- Yes
- No
PC-3 - Selecting Whether Clinical or Practicum Training Was Offered

Select Whether Clinical or Practicum Training Was Offered:

In Column 7, select whether clinical training or practicum training was offered as a part of the structured training program.

- Yes
- No
PC-3 - Selecting Whether Cultural Competency Training Was Offered

Select Whether Cultural Competency Training Was Offered:

In Column 8, select whether cultural competency training was offered as a part of the structured training program.

- Yes
- No
Select Type(s) of Partners/Consortia Used to Offer this Training: Select the type(s) of partnerships or consortia used or established for the purpose of offering each structured training program during the current reporting period by clicking on the drop-down menu under Column 9 and choosing all that apply from the following options:

- Academic department - outside the institution
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Long-term care facility
- Academic department - within the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HRSA Program
- FQHC or look-alike
- 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
- Academic 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 - ACL
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- 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
Area Health Education Centers

Warning: You may not select "No partners/consortia used" in combination with any other option.
PC-3 — Selecting Type(s) of Community-based Collaborator(s)

Select Type of Community-based Collaborator(s): Select the type(s) of community-based collaborators used or established to offer each program by clicking on the drop-down menu and choosing all that apply from the following options:

- Area Health Education Center
- Community Mental Health Center
- Federally-qualified health center or look-alikes
- Rural Health Clinic
- Community Health Center
- Critical Access Hospital
- Other Community-Based Organization
- N/A

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

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

Health Resources and Services Administration
Bureau of Health Workforce

- Nursing home
- Private/For-profit organization
- Senior Center
- Tribal Organization

- Nonprofit organization (non-faith based)
- Other
- Professional Associations
- State Government

- Physical therapy/Rehabilitation center
- Quality improvement organization
- Tribal Government

**Warning:** You may not select "No partners/consortia used" in combination with any other option.
PC-7 - Selecting Topic Area(s) Addressed by this Activity

Select Topic Area(s) Addressed by this Activity:

Complete Column 3b by selecting all of the topic areas addressed by each practicum/field placement program.

- Behavioral Health Integration
- Cultural Competency
- Current and Emerging Health Issues
- Interprofessional Education
- Practice Transformation
- Social Determinants of Health

- Behavioral Health Integration
- Current and Emerging Health Issues
- Practice Transformation
- Cultural Competency
- Interprofessional Education
- Social Determinants of Health

Note: Data in this column will pre-populate annually. Prior selections may not be unchecked in subsequent reporting years.

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.
Legislative Requirements & Demographic Variables—LR and DV Subforms

LR and DV - Introduction

The LR and DV forms capture aggregate-level information about the number of trainees and program completers who participated in each program or activity entered in the Training Program Setup form. You must complete the LR and DV tables for each Training Program offered during the reporting period:

1. **Structured** and **Unstructured** Training Programs: Enrollees and Program Completers can NOT be simultaneously reported
   - **Ongoing** Programs: Enter counts only for Enrollees (completer counts must be zeroes)
   - **Completed** Programs: Enter counts only for Program Completers (enrollee counts must be zeroes)

2. **Practica/Field Placement Programs**: Enrollees and Program Completers can be simultaneously reported.
LR-1a: Trainees by Training Category
LR-1 - Entering Ongoing Trainees Count

⚠️ Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).

![Trainees by Training Category](image)

**Trainees by Training Category:** Enter # of Ongoing Trainees

**Enter # of Ongoing Trainees**: Enter the number of ongoing trainees enrolled in each training program in the textbox in Column 1a.
LR-1 - Entering Program Completers Count

Trainees by Training Category: Enter # of Program Completers:

Enter the number of program completers who completed in each training program in Column 6.

⚠️ Warning: For ongoing Structured and Unstructured programs, the number of program completers should be \"0\".

⚠️ Warning: For the LR and DV forms, Enrollees and Program Completers must be counted separately (i.e., completers are NOT a subset of enrollees).

💡 Note: Active Practica/Field Placement programs may simultaneously report enrollees and program completers.
### LR-1 - Entering Attrition Information

<table>
<thead>
<tr>
<th>Attrition</th>
<th>Enter # of Individuals who left the Program before Completion</th>
<th>Enter # of URM who left the Program before Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7) Block 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8) Block 6a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 26. LR-1 - Entering Attrition Information**

**Attrition: Enter # of Individuals who left the Program before Completion:** In Column 7, enter the number of trainees who permanently left each training program before completion during the current reporting period.

**Attrition: Enter # of URM who left the Program before Completion:** In Column 8, enter the number of trainees who permanently left each training program who were from underrepresented minority backgrounds.

**Note:** Counts reported in Column 8 are a subset Column 7.

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.
## LR-2: Trainees by Age & Gender

### LR-2 - Entering Ongoing Trainees Count by Age and Gender

<table>
<thead>
<tr>
<th>Gender: Male</th>
<th>Gender: Female</th>
<th>Gender: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
</tr>
<tr>
<td>(2a)</td>
<td>(7a)</td>
<td>(12a)</td>
</tr>
</tbody>
</table>

**Figure 27. LR-2 - Entering Ongoing Trainees Count by Age and Gender**

**Gender: Male: Enter # of Ongoing Trainees:** Enter the number of male ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 2a.

**Gender: Female: Enter # of Ongoing Trainees:** Enter the number of female ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 7a.

**Gender: Not Reported: Enter # of Ongoing Trainees:** Enter the number of 'Gender: Not Reported' ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 12a.

⚠️ **Warning:** For the LR and DV forms, Ongoing Trainees and Program Completers must be counted separately (i.e., completers are NOT a subset of ongoing trainees).
**LR-2 - Entering Program Completers Count by Age and Gender**

<table>
<thead>
<tr>
<th>Gender: Male</th>
<th>Gender: Female</th>
<th>Gender: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Program Completers</td>
<td>Enter # of Program Completers</td>
<td>Enter # of Program Completers</td>
</tr>
<tr>
<td>(7) Blocks 49-54</td>
<td>(12) Blocks 55-60</td>
<td>(17)</td>
</tr>
</tbody>
</table>

**Figure 28. LR-2 - Entering Program Completers Count by Age and Gender**

**Gender: Male: Enter # of Program Completers:**

For each age group, enter the number of male program completers in Column 7 who completed each training program. If there were no male program completers in a specific age group who completed the training program during the current reporting period, enter a zero (“0”) in the appropriate age block.

**Gender: Female: Enter # of Program Completers:**

For each age group, enter the number of female program completers in Column 12 who completed each training program. If there were no female program completers in a specific age group who completed the training program during the current reporting period, enter a zero (“0”) in the appropriate age block.

**Gender: Not Reported: Enter # of Program Completers:** For each age group, enter the number of program completers whose gender who participated in each program in Column 17. If there were no program completers in a specific age group who participated in the training program during the current reporting period, enter a zero (“0”) in the appropriate age block.
Warning: For ongoing structured or unstructured training programs, all entries for program completers in Columns 7 and 12 must be zeroes (“0”).

Warning: For each training program, the sum of program completers across Columns 7, 12, and 17 must be equal to the number of enrollees entered in LR-1, Column 6.

Warning: For the LR and DV forms, Enrollees and Program Completers must be counted separately (i.e., completers are NOT a subset of enrollees).

Note: Active Practica/Field Placement programs may simultaneously report enrollees and program completers.

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.
## DV-1: Trainees by Racial & Ethnic Background

### DV-1 - Entering Ongoing Trainees Count by Race and Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity: Hispanic/Latino</th>
<th>Ethnicity: Non-Hispanic/Non-Latino</th>
<th>Ethnicity: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
</tr>
<tr>
<td>(2a)</td>
<td>(7a)</td>
<td>(12a)</td>
</tr>
</tbody>
</table>

Figure 29. DV-1 - Entering Ongoing Trainees Count by Race and Ethnicity

**Ethnicity: Hispanic/Latino: Enter # of Ongoing Trainees:** Enter the number of Hispanic ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 2a.

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Ongoing Trainees:** Enter the number of Non-Hispanic ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 7a.

**Ethnicity: Not Reported: Enter # of Ongoing Trainees:** Enter the number of 'Ethnicity Not Reported' ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 12a.

⚠️ **Warning:** For the LR and DV forms, Ongoing Trainees and Program Completers must be counted separately (i.e., completers are NOT a subset of ongoing trainees).
DV-1 - Entering Program Completers Count by Race and Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity: Hispanic/Latino</th>
<th>Ethnicity: Non-Hispanic/Non-Latino</th>
<th>Ethnicity: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Program Completers</td>
<td>Enter # of Program Completers</td>
<td>Enter # of Program Completers</td>
</tr>
<tr>
<td>(7) Blocks 29-35</td>
<td>(12) Blocks 64-70</td>
<td>(17)</td>
</tr>
</tbody>
</table>

Figure 30. DV-1 - Entering Program Completers Count by Race and Ethnicity

**Ethnicity: Hispanic/Latino: Enter # of Program Completers:** For each training program, enter the aggregate number of Hispanic/Latino program completers from each race category in Column 7. If there were no Hispanic/Latino program completers in a specific race category, enter a zero (“0”) in the appropriate textbox.

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Program Completers:** For each training program, enter the aggregate number of Non-Hispanic/Non-Latino program completers from each race category in Column 12. If there were no Non-Hispanic/Non-Latino program completers in a specific race category, enter a zero (“0”) in the appropriate textbox.

**Ethnicity: Not Reported: Enter # of Program Completers:** For each training program, enter the number program completers whose ethnicity was not reported who participated in each training program in Column 17. If there were no program completers in a specific racial category, or if the program was marked as complete, enter a zero (“0”) in the appropriate ethnicity/race block.

**Warning:** For ongoing structured or unstructured training programs, all entries for program completers in Columns 7 and 12 must be zeroes (“0”).
**Warning:** For each training program, the sum of program completers across Columns 7, 12, and 17 must be equal to the number of program completers entered in LR-1, Column 6.

**Warning:** For the LR and DV forms, Enrollees and Program Completers must be counted separately (i.e., completers are NOT a subset of enrollees).

**Note:** Active Practica/Field Placement programs may simultaneously report enrollees and program completers.

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.
### DV-2: Trainees from a Disadvantaged Background

**DV-2 - Entering Ongoing Trainees Count from Disadvantaged Background**

<table>
<thead>
<tr>
<th>Ongoing Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Total # from Disadvantaged Background</td>
</tr>
<tr>
<td>Enter # from Disadvantaged Background who are not URM</td>
</tr>
<tr>
<td>(13)</td>
</tr>
<tr>
<td>(14)</td>
</tr>
</tbody>
</table>

Figure 31. DV-2 - Entering Ongoing Trainees Count from Disadvantaged Background

**Ongoing Trainees: Enter Total # from Disadvantaged Background:** Enter the number of ongoing trainees from a disadvantaged background enrolled in each training program in the textbox under Column 13.

**Ongoing Trainees: Enter # from Disadvantaged Background who are not URM:** Enter the number of ongoing trainees from a disadvantaged background (who are not underrepresented minorities) enrolled in each training program during the current reporting period in the textbox in Column 14.
**DV-2 - Entering Program Completers Count from Disadvantaged Background**

<table>
<thead>
<tr>
<th>Program Completers</th>
<th>Enter Total # from Disadvantaged Background</th>
<th>Enter # from Disadvantaged Background who are not URM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(10) Block 9</td>
<td>(11) Block 10</td>
</tr>
</tbody>
</table>

**Program Completers: Enter Total # from Disadvantaged Background:** For each training program, enter the number of program completers from disadvantaged backgrounds in Column 10.

**Program Completers: Enter # from Disadvantaged Background who are not URM:** For each training program, enter the number of program completers from disadvantaged backgrounds who were NOT from URM backgrounds in Column 11.

**Warning:** For ongoing structured and unstructured programs, enter zeroes for program completer counts in Columns 10 and 11.

**Warning:** For the LR and DV forms, Enrollees and Program Completers must be counted separately (i.e., completers are NOT a subset of enrollees).

**Note:** Counts reported in Column 11 are a subset of counts reported in Column 10.
Note: Active Practica/Field Placement programs may simultaneously report enrollees and program completers.

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

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.
**DV-3: Diversity - Rural Background**

**DV-3 - Entering Ongoing Trainees Count from Rural Residential Background**

<table>
<thead>
<tr>
<th>Trainees from Rural Residential Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Ongoing Trainees from a Rural Background</td>
</tr>
<tr>
<td>(8)</td>
</tr>
</tbody>
</table>

Figure 33. DV-3 - Entering Ongoing Trainees Count from Rural Residential Background

**Trainees from Rural Residential Background: Enter # of Ongoing Trainees from a Rural Background:** Enter the number of ongoing trainees from a rural background enrolled in each training program in the textbox under Column 8.
DV-3 - Entering Program Completers Count from Rural Residential Background

<table>
<thead>
<tr>
<th>Trainees from Rural Residential Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Program Completers from a Rural Background</td>
</tr>
<tr>
<td>(6) Block 5</td>
</tr>
</tbody>
</table>

Figure 34. DV-3 - Entering Program Completers Count from Rural Residential Background

Trainees from Rural Residential Background: Enter # of Program Completers from a Rural Background: For each program, enter the number of program completers from rural residential backgrounds in Column 6.

⚠️ Warning: For ongoing structured or unstructured programs, enter a zero for program completers in Column 6.

⚠️ Warning: For the LR and DV forms, Enrollees and Program Completers must be counted separately (i.e., completers are NOT a subset of enrollees).

💡 Note: Active Practica/Field Placement programs may simultaneously report enrollees and program completers.

Reference: Refer to the glossary for a definition of rural residential background.
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Individual-level Data-INDGEN Subforms

INDGEN - Introduction

Notice to Grantees about Individual-level Data:

- You must complete an INDGEN record for each individual who received a BHW-funded financial award during the annual reporting period. In addition, annual updates are required for individuals who were previously reported on INDGEN and were not marked as having graduated, completed or attrited from their training program by July 01, 2018 - June 30, 2019.

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

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

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

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

IND-GEN - Setup

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

Figure 35. IND-GEN - Setup

Do you have either a) individuals who received direct financial support (e.g., scholarships, stipends, loans, loan repayment) from a HRSA-funded grant OR b) updates to provide for individuals who received direct financial support in a previous reporting period?:

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

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

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

⚠️ Warning: Prior records cannot be deleted.
IND-GEN - Selecting Type of Training Program

Type of Training Program:

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

*Note: The options available under "Type of Training Program" will prepopulate with information entered and saved in the Training Program Setup Form.*

*Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.*
IND-GEN - Entering Trainee Unique ID

Figure 37. IND-GEN - Entering Trainee Unique ID

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

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

💡 Note: This Block will prepopulate for prior records with data submitted in previous reporting periods.
IND-GEN - Selecting Individual's Training or Awardee Category

Select Individual's Training or Awardee Category:

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

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

(Note: This Block will prepopulate for prior records with data submitted in previous reporting periods.)
**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:

- Full-time
- Part-time
- Inactive
IND-GEN - Selecting Individual's Gender

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

- Female
- Male
- Not Reported

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

**Enter Year of Birth**: Select each individual’s year of birth in the dropdown menu under Column 6a.

- 1917
- 1918
- 1919
- 1920
- 1921
- 1922
- 1923
- 1924
- 1925
- 1926
- 1927
- 1928
- 1929
- 1930
- 1931
- 1932
- 1933
- 1934
- 1935
- 1936
- 1937
- 1938
- 1939
- 1940
- 1941
- 1942
- 1943
- 1944
- 1945
- 1946
- 1947
- 1948
- 1949
- 1950
- 1951
- 1952
- 1953
- 1954
- 1955
- 1956
- 1957
- 1958
- 1959
- 1960
- 1961
- 1962
- 1963
- 1964
- 1965
- 1966
- 1967
- 1968
- 1969
- 1970
- 1971
- 1972
- 1973
- 1974
- 1975
- 1976
- 1977
- 1978
- 1979
- 1980
- 1981
- 1982
| Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   | Year   |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2013   | 2014   | 2015   | Not Reported | 2016   | 2017   |
Select Individual's Ethnicity: Select each individual’s ethnicity by clicking on the drop-down menu in Column 7 (Block 6) and choosing one of the following options:

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

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.
Select Individual's Race: Select each individual’s race by clicking on the drop-down menu in Column 8 (Block 7) and choosing all that apply from the following options. You may select more than one option for individuals of multiple races:

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

**Warning:** You may not select "Not Reported" in combination with any other option.

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

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

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

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

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

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

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

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

*Figure 47. IND-GEN - Entering BHW-Funded Financial Award Information*

**Select Whether Individual Received BHW Financial Award?:** Select whether each student received a BHW-funded financial award during the annual reporting period by clicking on the drop-down menu under Block 11 and choosing one of the following options:

- Yes
- No

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

- If the individual **did receive** a direct BHW-funded financial award, enter the total amount of BHW dollars provided during the current reporting period in the textbox in Column 20a.

- If the individual **did not receive** a direct BHW-funded financial award, enter "0" in the textbox in Column 20a.
IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

Enter # of Academic Years the Individual has Received BHW Funding

<table>
<thead>
<tr>
<th>Block 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>(22)</td>
</tr>
</tbody>
</table>

Figure 48. IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

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

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

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

**Note:** If an individual has received money for ½ an academic year, please round up. For example, if a resident or dentist has received a financial award for 1 ½ years, please enter 2.

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

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

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

Note: For faculty or preceptors, select N/A.
**IND-GEN - Selecting Topic Area(s) on which Individual was Trained**

<table>
<thead>
<tr>
<th>Select Topic Area(s) on which Individual was Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(26a) Block 15</td>
</tr>
</tbody>
</table>

**Figure 50. IND-GEN - Selecting Topic Area(s) on which Individual was Trained**

**Select Topic Area(s) on which Individual was Trained:** Use the dropdown menu in Column 26a to select all that apply from the list of topic areas on which the individual was trained.

- Behavioral Health Integration
- Current and Emerging Health Issues
- Practice Transformation
- Cultural Competency
- Interprofessional Education
- Social Determinants of Health
IND-GEN - Selecting any HHS Priority Topic Area on which an Individual Received Training

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

- Individual participated on a health care team delivering integrated behavioral health services in primary care
- Individual received a SAMHSA waiver to prescribe medication assisted treatment (MAT)
- Individual received training in opioid use treatment
- Individual received training in telehealth
- Individual received training on integrated behavioral health in primary care
- Individual received training in medication assisted treatment (MAT) for SUD/OUD
- Individual received training in substance use treatment
- None of the above
Select Individual's Primary Discipline: Select individual's profession and discipline by clicking on the drop-down menu in Column 27 (Block 16) and choosing the available options.

- Student - Certificate - CNA
- Student - Certificate - Nursing Assistant/Aide
- Student - Certificate - Respiratory Technician
- Student - Community Health Nursing
- Student - Graduate - Clinical Mental Health Counseling
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Medical Assistant
- Student - NP - Adult
- Student - NP - Family
- Student - NP - Psychiatric/Mental health
- Student - Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Other - Physical Therapy
- Student - Paraprofessional - Mental Health Worker
- Student - Physical Therapy
- Student - Registered Nurse - BSN
- Student - Certificate - Community Health Worker
- Student - Certificate - Pharmacy Technician
- Student - CNS - Adult gerontology
- Student - Dental Hygiene
- Student - Graduate - Marriage and Family Therapy
- Student - Graduate - Professional Counseling
- Student - Graduate - Public Health Social Work
- Student - Medical School
- Student - NP - Adult gerontology
- Student - NP - Family Psychiatric/Mental Health
- Student - Nurse Educator
- Student - Other
- Student - Paraprofessional - Behavioral Health Technician/Aide
- Student - Certificate - Dental Assistant
- Student - Certificate - Phlebotomy Technician
- Student - CNS - Psychiatric/Mental health
- Student - Dental School
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Psychology
- Student - Graduate - Social Work
- Student - NP - Acute care adult gerontology
- Student - NP - Adult Psychiatric/Mental Health
- Student - NP - Other advanced nurse specialists
- Student - Nurse midwife
- Student - Other - Allied Health
Area Health Education Centers

- Student - Undergraduate - Clinical Laboratory Services
- Student - Paraprofessional - Substance Use/ Addictions Worker
- Student - Physician Assistant
- Student - Speech Therapy
- Student - Undergraduate - Other
- Student - Paraprofessional - Community Health Worker
- Student - Pharmacy School
- Student - Registered nurse (RN)
- Student - Undergraduate - Allied Health
- Student - Undergraduate - Public Health

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.
## IND-GEN - Selecting Training in Interprofessional Education and/or Practice

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

<table>
<thead>
<tr>
<th>Training in Interprofessional Education and/or Practice</th>
<th>Select Whether Individual Received Training</th>
<th>Enter # of Contact Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(27a) Block 16</td>
<td>(27b) Block 16</td>
</tr>
</tbody>
</table>

**Training in Interprofessional Education and/or Practice: Select Whether Individual Received Training:**

Select whether each individual received experiential training in interprofessional education and/or practice during the annual reporting period by clicking on the drop-down menu under Column 27a and choosing one of the following options:

- Yes
- No
- N/A

**Training in Interprofessional Education and/or Practice: Enter # of Contact Hours:** If the individual received clinical or experiential training in interprofessional education/practice, enter the total number of hours spent in this type of setting during the current reporting period in
If the individual did not receive clinical or experiential training in interprofessional education/practice, leave the textbox in Column 27b blank.
**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.

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

**Figure 54. IND-GEN - Entering Training Information in a Primary Care Setting**

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

- Yes
- No
- N/A

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

- **If the resident or fellow received clinical or experiential training in a primary care setting,** enter the total number of hours spent in this type of setting during the current reporting period in the textbox.
- **If the resident or fellow did not receive clinical or experiential training in a primary care setting,** leave the textbox blank.
**IND-GEN - Entering Training Information in a Medically Underserved Community**

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

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

**Figure 55. IND-GEN - Entering Training Information in a Medically Underserved Community**

Training in a Medically Underserved Community: Select Whether Individual Received Training: If the individual received clinical or experiential training in a MUC, enter the total number of hours spent in this type of setting during the current reporting period in the textbox in Column 31 (Block 18a).

If the individual did not receive clinical or experiential training in a MUC, leave the textbox in Column 31 (Block 18a) blank.

- Yes
- No
- N/A

Training in a Medically Underserved Community: Enter # of Contact Hours: If the individual received clinical or experiential training in a MUC, enter the total number of hours spent in this type of setting during the current reporting period in the textbox in Column 31 (Block 18a).

If the individual did not receive clinical or experiential training in a MUC, leave the textbox in Column 31 (Block 18a) blank.
**IND-GEN - Entering Training Information in a Rural Area**

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

<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 56. IND-GEN - Entering Training Information in a Rural Area

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

- If the individual received clinical or experiential training in a rural area, enter the total number of hours spent in this type of setting during the current reporting period in the textbox.
- If the individual did not receive clinical or experiential training in a rural area, leave the textbox blank.

- Yes
- No
- N/A

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

- If the individual received clinical or experiential training in a rural area, enter the total number of hours spent in this type of setting during the current reporting period in the textbox.
- If the individual did not receive clinical or experiential training in a rural area, leave the textbox blank.
IND-GEN — Selecting Student Services Information

<table>
<thead>
<tr>
<th>Student Services</th>
<th>Select Social Support services used by Trainee</th>
<th>Select Academic Support services used by Trainee</th>
</tr>
</thead>
<tbody>
<tr>
<td>(34a)</td>
<td>(34b)</td>
<td></td>
</tr>
</tbody>
</table>

Figure 57. IND-GEN — Selecting Student Services Information

**Student Services: Select Social Support services used by Trainee:** Select whether each trainee used social support services by clicking on the drop-down menu under Column 34a and choosing all that apply from the following options:

- Faculty or staff led counseling sessions
- Peer support advisors
- Service learning opportunities
- Other social support services
- Peer support groups
- None of the above

**Student Services: Select Academic Support services used by Trainee:** Select whether each trainee used academic support services by clicking on the drop-down menu under Column 34b and choosing all that apply from the following options:

- Academic coaching
- Faculty or staff led advising sessions
- Individual tutoring
- Study skills training
- Academic support program
- Group tutoring
- Other academic support service
- Time management training
- None of the above
IND-GEN - Selecting Whether Individual Left the Program Before Completion

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

- Yes
- No

Figure 58. IND-GEN - Selecting Whether Individual Left the Program Before Completion
IND-GEN — Selecting Reason for Attrition or Inactive Status

Select Reason for Attrition or Inactive Status: Select the primary reason each individual discontinued participation by clicking on the drop-down menu under Column 36a and choosing one of the following options:

- Academic withdrawal
- Family obligations
- Military/Active duty
- Other
- Change in major
- Financial obligations
- Transfer to another institution
- None of the Above
- Discontinuous year in training program
- Medical leave of absence
- Transportation difficulties
- N/A

Figure 59. IND-GEN — Selecting Reason for Attrition or Inactive Status
**IND-GEN - Entering Graduation/Completion Information**

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

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

**Figure 60. IND-GEN - Entering Graduation/Completion Information**

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

- Yes
- No

**Select Degree Earned:**

- **If an individual graduated from their training program during the current reporting period,** select the type of degree/certificate earned through the program by clicking on the drop-down menu and choosing one of the available options.
- **If the individual did not complete their training program,** select "N/A."

- AA
- Bachelor's Degree not otherwise specified
- BSW
- DDS
- DMD
- DNSc
- AS
- BPH
- Certificate
- DDS/MPH
- DNAP
- DO
- BA
- BS
- DC
- DDS/MSPH
- DNP
- DO/DrPH

Area Health Education Centers
Select Individual's Post-Graduation/Completion Intentions:

- **If an individual graduated from their training program during the current reporting period,** select the individual’s training or employment intentions by clicking on the drop-down menu and choosing all that apply from the available options.

- **If the individual did not complete their training program,** select "N/A."

- Individual has applied to a residency program
- Individual intends to become employed or pursue further training in a primary care setting
- None of the above
- N/A

- 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
- Not Reported
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

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 has applied to and/or is participating in a residency program
- Individual is currently employed or is pursuing further training in a primary care setting
- Individual is currently providing treatment or wrap-around services to individuals with substance use disorders
- 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 rural setting
- Individual is currently working in a facility that provides substance use treatment services
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
- Other Clinical Training Site
- Area Health Education Center
- FQHC or Look-Alike
- Rural Health Clinic
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 subforms are used to characterize experiential or clinical training characteristics, including training sites and the number and profession/discipline of trainees.

- The EXP-1 Setup form captures information about the sites used by grantees to provide trainees with clinical or experiential training.
- The EXP-2 subform collects information about the profession and discipline of individuals trained at each site that was entered in the EXP-1 Setup form.

2. Order of Subforms:

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

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

- The BPMH system will prepopulate the names each site previously reported in the Saved Records Table within the EXP-1 subform.
- You must indicate whether each previously-reported site was used during the current annual reporting period.

Note: Complete the EXP-1 and EXP-2 forms with information about the sites and trainees participating in AHEC-sponsored community-based practica and field placement programs. These individuals were demographically described on the LR/DV forms.
EXP-1: Training Site Setup

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.

Note: There is an option to delete both new and prior records on EXP-1. This option should only be used if the clinical sites will not be used in the future, or were erroneously entered. The delete option is not reversible (i.e. if the site was erroneously deleted, it will need to be re-entered again).
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
- Assisted Living Community
- Community-based care programs for elderly mentally challenged individuals
- Day and home care programs (e.g. Home Health)
- Dentist Office
- Federal Government Office or Agency
- Geriatric Behavioral or Mental Health Units
- Hospital
- Indian Health Service (IHS) site
- Local health department
- Nurse Managed Health Clinics
- Nursing Home
- Other Oral Health Facility
- Program of All Inclusive Care for the Elderly
- Specialty clinics (e.g. mental health practice rehabilitation substance abuse clinic)
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community care programs for elderly mentally challenged individuals
- Community Mental Health Center
- Critical Access Hospital
- Emergency Room
- FQHC or look-alike
- Geriatric consultation services
- International nonprofit/nongovernmental organization
- Long-term Care Facility
- National health association
- National health association or affiliate
- Other
- Physician Office
- Senior Centers
- Rural Health Clinic
- Surgery Clinic
- Acute care services
- Community-based organization
- Community Health Center (CHC)
- Community Behavioral Health Center
- Day and home care programs (e.g., home health)
- Federal and State Bureau of Prisons
- Geriatric ambulatory care and comprehensive units
- Hospice
- Independent Living Facility
- Local Government Office or Agency
- Mobile Clinic/Site
- Nurse-managed Health Clinic
- Other community health center (e.g.; free clinic)
- School-based clinic
Area Health Education Centers

- State Health Department
- Tribal Health Department
- Tribal Government

- Tribal Organization

- Residential Living Facility
- State Government Office or Agency
- Veterans Affairs Healthcare (e.g. VA Hospital or clinic)
- Veterans Affairs Hospital or clinic

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 individuals during the current reporting period was located in designated settings by clicking on the drop-down menu under Column 4 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
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 individuals at each site during the reporting period by clicking on the drop-down menu in Column 5 and choosing all that apply from the following options:

- Academic department - outside the institution
- Community Health Center (CHC)
- Alzheimer's Association/Chapters
- Area Agencies on Aging
- Educational institution (Grades K - 12)
- Geriatric ambulatory care and comprehensive units
- Federal Government - ACL
- Health center (e.g.; free clinic)
- Federal Government - IHS
- Hospice
- Federal Government - SAMHSA
- Nonprofit organization
- Physical therapy/Rehabilitation center
- Senior Center
- Federally - qualified health center or look-alikes
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Academic institution
- Day and home care programs (i.e. Home Health)
- Alzheimer's Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Federal Government - Veterans Affairs
- Federal Government - Other HRSA Program
- Geriatric consultation services
- Federal Government - CDC
- Federal Government - NIH
- Federal Government - Other HHS Agency/Office
- Local Government
- Nursing home
- Professional Associations
- State Governmental Programs
- Academic department - within the institution
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Mental Health Center
- Federal Government - Department of Defense/Military
- Geriatric Behavioral or Mental Health Units
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other
- Hospital
- Long-term care facility
- Other
- Quality improvement organization
- Tribal Government
- Health department - Local
- Health disparities research center
Health Resources and Services Administration
Bureau of Health Workforce

- No partners/consortia used
- Tribal Organization
- Health department - Tribal
- Health policy center

- Private/For-profit organization

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

<table>
<thead>
<tr>
<th>Select Type(s) of Vulnerable Population Served at this Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
</tr>
</tbody>
</table>

#### Figure 67. 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 and choosing all that apply from the following options:

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

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

City:

State:

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

Four Digit Zip Code Extension: Enter the four-digit zip code extension where each training site is located by clicking on the textbox in 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. Upon saving and validating the EXP-1 form, the city and state information will auto-populate.
**EXP-1 - Entering Site's Payment Model**

![Payment Model Table](image)

**Figure 69. EXP-1 - Entering Site's Payment Model**

**Payment Model**: Select the payment model used by each training site by clicking on the drop-down menu in Column 12 and selecting *all that apply* from the following options:

- ACO
- CHIP
- Medicare
- Other Public
- Self - Pay
- VA
- Bundled Payments
- Dual Eligible (Medicaid & Medicare)
- Military TRICARE
- Patient Centered Medical Home
- Sliding Scale
- Workman’s Comp
- Charity Care
- Medicaid
- Other Private Insurance
- PPO
- Uninsured
- N/A
EXP-1 - Selecting Whether the Training Site Implements Interprofessional Education and/or Practice

Figure 70. EXP-1 - Selecting Whether the Training Site Implements Interprofessional Education and/or Practice

Select whether the training site implements interprofessional education and/or practice: Select whether the training site implements interprofessional education and/or practice

- Yes
- No
EXP-1 - Selecting any HHS Priorities Addressed at this Site

Select any HHS Priorities Addressed at this Site:

Using the dropdown menu in Column 14, select all that apply from the list of HHS priorities that were addressed at this site.

- This site offers integrated behavioral health services in a primary care setting
- This site offers opioid use treatment services
- This site offers telehealth services
- This site offers medication assisted treatment (MAT) for OUD
- This site offers substance use treatment services
- None of the above

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

<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 72. 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 one of the training program options. The options available will be programs marked as "Active" on the Training Program Setup Form.

**Site Name:** Next, pair the selected training program with a training site by clicking on the drop-down menu in Column 2 and choosing 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*

- **Note:** *Dropdown options in Column 1 will be the structured, unstructured, and field placement programs offered in the current reporting period, as reported on the Training Program Setup form.*

- **Note:** *Dropdown options in Column 2 will be the sites reported on EXP-1 as offered in the current reporting period.*
**EXP-2 - Selecting Profession and Discipline of Individuals Trained**

<table>
<thead>
<tr>
<th>Select Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3) Block 3</td>
</tr>
</tbody>
</table>

**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 - Other Social Work Substance Abuse/Addictions Counseling
- Student - Diploma/Certificate
- 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 - Geriatrics
- Behavioral Health - Clinical Social Work
- Behavioral Health-Other Psychology, Social Work, or Substance Abuse/Addictions Counseling
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Orthopaedic Surgery
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Psychology Social Work or Substance Abuse/Addictions Counseling
- Behavioral Health - Psychology
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Home Health Aide
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Other
Area Health Education Centers

- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Student - Physician Assistant
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Nursing - Other (e.g., CNA, PCA)
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult
- Nursing - NP - Family
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
- Nursing - Nurse informaticist
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Medicine - Pathology - Anatomical and Clinical
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- 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 - Child/Adolescent Psychiatric/Mental Health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Neonatal
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Student-CNS-Women's health
- Nursing - Public health nurse
- Other - Allied Health
- Other - Community Health Worker
- Other - Facility Administrator
- Student-Emergency Medical Technician/Paramedic
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- 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 - Emergency care
- Student - Undergraduate - Dental Therapy
- Nursing - NP - Pediatrics
- Nursing - Nurse administrator
- Student-CNS-Women's health and pediatrics
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Audiology
- Student - Community Health Worker
- Other - First Responder/EMT
- Other - Health Informatics/Health Information Technology
- Student - Graduate - Health Sciences
- Other - Midwife (non-nurse)
- Other - Office/Support Staff
- Student - Health Information Technician
- Other - Physical Therapy
- Other - Profession Not Listed
- Other - Registered Dietician
Area Health Education Centers

- Other - Chiropractor
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Lay and Family Caregiver
- Other - Medical Laboratory Technology
- Other - Nutritionist
- Other - Optometry
- Other - Pharmacy
- Student-Licensed Nursing Assistant
- Other - Radiologic technology
- Other - Research
- Other - Speech Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Nutrition
- Student-Patient Care/Support Technician
- Student-Physical Therapy Assistant
- Student - Nursing - Nurse midwife
- Student - Certified Nursing Assistant
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women’s health
- Student - Dental Assistant
- Student - Dietician
- Student - Graduate - Allied Health
- Student - Graduate - Nursing
- Other - Medical Assistant
- Other - Midwife
- Other - Occupational Therapy
- Other - Other
- Student-NP-Women's health
- Other - Podiatry
- Other - Recreational Therapy
- Other - Respiratory Therapy
- Other - Unknown
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Infectious Disease Control
- Student-Undergraduate-Health Sciences Program
- Student-Pharmacy Technician
- Student-Radiological Assistant
- Student - Nursing - Registered nurse (RN)
- Student - Chiropractic School
- Student - CNS - Family
- Student - CNS - Pediatrics
- Student - CNS - Women’s health and pediatrics
- Student - Dental Hygiene
- Student - EMT
- Student - Graduate - Behavioral Health
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Other Behavioral Health
- Student - Graduate - Radiological Assistant
- Student - Home Health Aide
- Student - Medical Assistant
- Student - NP - Acute care adult gerontology
- Student - NP - Adult gerontology
- Annual Performance Report
- Academic Year 2018-2019
- 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
- Student-Phlebotomy Technician
- Student - Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Alternative/Complementary Nursing
- Student - CNL - Generalist
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Community Health Nursing
- Student - Dental School
- Student - Graduate - Social Work
- Student - Graduate - Clinical Laboratory Services
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Graduate - Social Work
- Student - Law School
- 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
Note: Principal trainees are the AHEC trainees who participated in community-based field placement programs. For your grant program, these are the individuals reported on the LR-1 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 AHEC grant.
Note: Do not select professions/disciplines for faculty, site staff, or other non-trainees.
**Figure 74. EXP-2 - Entering # Trained in the Profession and Discipline**

**Enter # Trained in this Profession and Discipline**: In Column 4, enter the number of training experiences for principal trainees in the profession and discipline selected that were trained at each site during the current reporting period. If a trainee participated more than one rotation, they may be counted more than once.

- **Note**: Counts provided for "Principal" trainees in Column 4 should be based on individuals reported on LR-1 for community-based field placement programs.

- **Note**: Do not count faculty or non-trainees.
EXP-2 - Adding Individuals Trained Example 1

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

- At Site 1, there were 24 principal medical students and no “other interprofessional” trainees (see row 1).
- At Site 2, there were 10 principal medical students and no “other interprofessional” trainees (see row 2).
- At Site 3, there were 4 principal medical students and no “other interprofessional” trainees (see row 3).

<table>
<thead>
<tr>
<th>No.</th>
<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>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Practicum/Field Placement</td>
<td>Site 1</td>
<td>Student-Medical School</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>Practicum/Field Placement</td>
<td>Site 2</td>
<td>Student-Medical School</td>
<td>10</td>
</tr>
<tr>
<td>3</td>
<td>Practicum/Field Placement</td>
<td>Site 3</td>
<td>Student-Medical School</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(1)</th>
<th>(2) Block 1</th>
<th>(3) Block 3</th>
<th>(4) Block 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Site 1</td>
<td>Student-Medical School</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>Site 2</td>
<td>Student-Medical School</td>
<td>10</td>
</tr>
<tr>
<td>3</td>
<td>Site 3</td>
<td>Student-Medical School</td>
<td>4</td>
</tr>
</tbody>
</table>

Figure 75. EXP-2 - Adding Individuals Trained Example 1
### EXP-2 - Adding Individuals Trained Example 2

<table>
<thead>
<tr>
<th>No.</th>
<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 Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Practicum/Field Placement</td>
<td>Site 1</td>
<td>Student-Medical School</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Practicum/Field Placement</td>
<td>Site 1</td>
<td>Student-Pharmacy School</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Practicum/Field Placement</td>
<td>Site 1</td>
<td>Medicine - Psychiatry</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>Practicum/Field Placement</td>
<td>Site 2</td>
<td>Student-Medical School</td>
<td>15</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Practicum/Field Placement</td>
<td>Site 2</td>
<td>Student-Pharmacy School</td>
<td>0</td>
<td>4</td>
</tr>
</tbody>
</table>

**Figure 76. EXP-2 - Adding Individuals Trained Example 2**

**Example 2. Principal and Other Interprofessional Trainees (different disciplines):** In Example 2, medical students participated in interprofessional training experiences alongside other trainees.

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

At Site 2, 15 principal medical students trained alongside “other interprofessional” trainees: 4 pharmacy students who were not associated with the HRSA grant (see rows 4 and 5).
Example 3. Principal and Other Interprofessional Trainees (same disciplines): In Example 3, medical students participated in interprofessional training experiences alongside other trainees, including other medical students who were not associated with the HRSA grant.

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

- At Site 2, 10 principal medical students trained alongside “other interprofessional” trainees: 5 dental students and 22 other medical students who were not associated with the HRSA grant (see rows 3 and 4).
**Selective 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. No other action is needed.

- Academic institution
- Aerospace operations setting
- Assisted Living Community
- Community - based care programs for elderly mentally challenged individuals
- Day and home care programs (e.g. Home Health)
- Dentist Office
- Federal Government Office or Agency
- Geriatric Behavioral or Mental Health Units
- Hospital
- Indian Health Service (IHS) site
- Local health department
- Nurse Managed Health Clinics
- Nursing Home
- Other community health center (e.g.; free clinic)
- School - based clinic
- Residential Living Facility
- Senior Center
- State Health Department
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community care programs for elderly mentally challenged individuals
- Community Mental Health Center
- Critical Access Hospital
- Emergency Room
- FQHC or look - alike
- Geriatric consultation services
- International nonprofit/nongovernmental organization
- Long - term Care Facility
- National health association
- National health association or affiliate
- Other
- Other Oral Health Facility
- Program of All Inclusive Care for the Elderly
- Specialty clinics (e.g. mental health practice rehabilitation substance abuse clinic)
- Specialty clinic (e.g., mental health practice, rehabilitation, substance abuse clinic)
- Surgery Clinic
- Acute care services
- Community - based organization
- Community Health Center (CHC)
- Community Behavioral Health Center
- Day and home care programs (e.g., home health)
- Federal and State Bureau of Prisons
- Geriatric ambulatory care and comprehensive units
- Hospice
- Independent Living Facility
- Local Government Office or Agency
- Mobile Clinic/Site
- Nurse-managed Health Clinic
- Other community health center (e.g., free clinic)
- Physician Office
- Senior Centers
Area Health Education Centers

Health Resources and Services Administration
Bureau of Health Workforce

- Tribal Health Department
- Veterans Affairs Hospital or clinic
- Tribal Organization
- Tribal Government
- Rural Health Clinic
- State Government Office or Agency
- Veterans Affairs Healthcare (e.g., VA Hospital or clinic)
- Veterans Affairs Healthcare (e.g., VA Hospital or clinic)

Note: Site types are linked to the name of training sites in EXP-1. To change the associated site type with a particular site name, return to EXP-1.
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. No other action is needed.

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

Note: Site settings are linked to the name of training sites in EXP-1. To change the associated site type with a particular site name, return to EXP-1.

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

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

1. 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).

2. 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.

3. 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.

4. 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.
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

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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 80. CDE-1 - Setup

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

Have you used BHW resources or received in-kind support to develop or enhance a course or other training activity associated with the grant?:

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

Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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 courses or training activities other than those previously reported.
CDE-1 - Selecting Type of Course or Training Activity

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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 under Column 2 (Block 2) and choosing one of the following options:

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

💡 Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior records cannot be deleted.
CDE-1 - Selecting whether Course was Newly Developed or Enhanced

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

Select whether Course or Training Activity was Newly Developed or Enhanced:

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

- Enhanced
- Newly developed

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

Note: Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period.
CDE-1 - Entering Development/Enhancement Status

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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

Figure 84. CDE-1 - Entering Development/Enhancement Status

Note: For prior records, this field will be prepopulated with data from the previous reporting period.

Example:
CDE-1 - Selecting Delivery Mode

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

<table>
<thead>
<tr>
<th>Select Delivery Mode Used to Offer this Course or Training Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>(8) Block 6</td>
</tr>
</tbody>
</table>

Figure 85. CDE-1 - Selecting Delivery Mode

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

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

💡 Note: This column will prepandate for prior records with data submitted in the previous reporting period.
Select Primary Topic Area: elect 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 - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
- 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 - Telehealth
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed
- 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
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
Note: **Clinical Training-Public health** incorporates the following topic areas: health promotion and disease prevention, health policy/advocacy, emergency preparedness and response, environmental health, nutrition, epidemiology, data collection and analysis etc. **Clinical Training - Technology - Other** incorporates the following topic areas: telemedicine, informatics, electronic medical records etc.

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.

- Offered
- Not Offered
- Re-offered

Note: Select "Offered" if this is the first time the course is being offered. If the course has been offered in prior reporting periods, select "Re-offered".

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: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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

Figure 88. 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 the 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 - Clinical Social Work
- Behavioral Health - Counseling Psychology
Area Health Education Centers

- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - General Dentistry/Public Health
- 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 - Pathology - Anatomical and Clinical
- Medicine - IM in Preventive Medicine/Internal Medicine
- Medicine - Physical Medicine and Rehabilitation
- Medicine - IM in Preventive Medicine/Public Health
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Behavioral Health - Other Psychology
- Behavioral Health - Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Prosthodontic Dentistry
- 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 - IM in Preventive Medicine/Aerospace Medicine
- Medicine - Pediatrics
- Medicine - IM in Preventive Medicine/Pediatrics
- Medicine - Plastic Surgery - Integrated
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Dental Hygiene/Public Health
- Dentistry - Public Health Dentistry
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Medicine - Orthopaedic Surgery
- Medicine - IM in General Preventive Medicine
- Medicine - IM in Preventive Medicine/Family Medicine
- Medicine - IM in Preventive Medicine/Occupational Medicine
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine
- 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)
Area Health Education Centers

- 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 Psychiatry/Mental health
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Nurse practitioner
- Nursing - Registered Nurse
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Midwife (non - nurse)
- Other - Optometry
- Other - Profession Not Listed
- Other - Veterinary Medicine
- Nursing - Nurse Assistant/Patient Care Associate (PCA)
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Student - Certified Nursing Assistant
- Student - Alternative/Complementary Nursing
- Nursing - CNS - Women's health
- 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 administrator
- Nursing - Nurse informaticist
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Nutritionist
- Other - Pharmacy
- Other - Respiratory Therapy
- Other - Allied Health
- Other - Physical Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Student - Chiropractic School
- Student - CNL - Generalist
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Community Health Nursing
- Student - Dental School

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- Nursing - NP - Adult gerontology
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Public health nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife
- Other - Office/Support Staff
- Other - Podiatry
- Other - Unknown
- Other - Occupational Therapy
- Other - Speech Therapy
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- 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 - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Midwife (non - nurse)
Area Health Education Centers

- 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 - Medical Assistant
- Student - NP - Acute care adult gerontology
- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Nurse Administrator
- Student - Nurse Midwife
- Student - Occupational Therapy
- Student - Physical Therapy
- Student - Post - high school / Pre - college
- Student - Registered Nurse - BSN
- Student - Undergraduate - Allied Health
- Student - Undergraduate - Public Health
- Student - Unknown
- Student - Dental School/Public Health

- Student - Graduate - Clinical Laboratory Services
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Home Health Aide
- 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 - Public Health Nurse
- Student - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant
- Student - Podiatry School

- Student - NP - Adult
- Student - NP - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
- Student - NP - Other advanced nurse specialists
- Student - NP - Women's health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Pharmacy School
- Other - Home Health Aide
- Student - Registered nurse (RN)
- Student - Speech Therapy
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician
- Student - Dental Hygiene/Public Health
Note: Student disciplines begin with the student prefix (e.g., Student- Medical School). Advanced trainee disciplines (residents and fellows) begin with profession identifiers (e.g., Medicine- Dermatology).

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 reporting period. Trainee counts for faculty development participants are captured separately using the FD-subforms and continuing education participants are reported on the CE subforms.
CDE-2 - Entering # Trained in the Profession and Discipline

⚠️ Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

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. Repeat this process to capture the profession and discipline of all individuals trained in each course or training activity during the current reporting period.

💡 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 reporting period. Trainee counts for faculty development participants are captured separately using the FD-subforms and continuing education participants are reported on the CE subforms.
CDE-2 - Selecting Type of Course or Training Activity

**Warning:** The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

Select Type of Course or Training Activity: Following the selection of the Type of Course or Training Activity in CDE-1, the Type of Course or Training Activity will be automatically populated when the save and validate button is selected.

- 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

**Note:** Type of Course or Training Activity is linked to the name of the course or training activity in CDE-1. To change the associated course type with a particular course, return to CDE-1.
CDE-2 - Selecting whether Course was Newly Developed or Enhanced

Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

Select whether Course or Training Activity was Newly Developed or Enhanced:

- Enhanced
- Newly developed

Note: Development status is linked to the name of the course or training activity in CDE-1. To change the associated development status with a particular course, return to CDE-1.
Warning: The CDE subforms apply ONLY to the AHEC Purpose #5 (Special Project - Integrating Behavioral Health into Primary Care). If you have not selected the AHEC-5 purpose, skip the instructions for the CDE subform and proceed to the next section describing the CE subforms.

Select Delivery Mode Used to Offer this Course or Training Activity: The delivery mode will be automatically populated when the save and validate button is selected.

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

Note: Delivery mode is linked to the name of the course or training activity in CDE-1. To change the associated delivery mode with a particular course, return to CDE-1.
## Select Primary Topic Area

Following the selection of the Primary Topic Area in CDE-1, the Primary Topic Area will be automatically populated when the save and validate button is selected.

- 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 - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
- 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 - Telehealth
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed
- 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
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
Note: Primary topic area is linked to the name of the course or training activity in CDE-1. To change the associated primary topic area with a particular course, return to CDE-1.
Select Whether the Course or Training Activity was Offered in the Current Reporting Period: Following the selection of whether the Course or Training Activity was Offered in the Current Reporting Period in CDE-1, the course offering status will be automatically populated when the save and validate button is selected.

- Offered
- Not Offered
- Re-offered

Note: Offering status is linked to the name of the course or training activity in CDE-1. To change the associated offering status with a particular course, return to CDE-1.

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

1. **Purpose:** The CE subforms are used to characterize continuing education course characteristics and 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 professions and disciplines of individuals trained in the offered CE courses or training activities.

2. **Order of Subforms:**
   
   - 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 initially appear blank.
   - The only courses or activities requiring entry 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

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 and will allow you to begin data entry.

Figure 95. CE-1 - Setup
Course Title: Enter the name of each course offered during the current reporting period by typing the name in the textbox in Column 1 (Block 1).

Note: Course titles are limited to 200 characters.

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
CE-1 - Selecting Whether Course is Approved for Continuing Education Credit

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

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

Reference: Refer to the glossary for a definition of continuing education course accreditation.
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).

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
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 current reporting period in the textbox in Column 4 (Block 4).

Note: For instructional activities offered via distance learning on an ongoing basis, enter 999.

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
Select Delivery Mode Used to Offer Course: Select the primary delivery mode used to offer each course during the current 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
- Distance learning (Online Webinar)
- Other
- Classroom-based
- Hybrid
- Real-time/Live distance learning

Note: If "Other" is selected, please specify the primary delivery mode for the course in the comments field. Please include the course name in the comment.

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
CE-1 - Selecting Type(s) of Partnership(s)

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 current 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
- 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 HHS Agency/Office
- Federal Government - Veterans Affairs
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Academic department - within the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - ACL
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - Other HRSA Program
- FQHC or look-alike
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nurse Managed Health Clinics
- Physical therapy/Rehabilitation center
- Quality improvement organization
- Academic 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
- Federal Government - SAMHSA
- 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
- Private/For - profit organization
Area Health Education Centers

Warning: You may not select "No partners/consortia used" in combination with any other option.

Note: If "Other" is selected, specify the type of partnership for the course in the comments field. Be sure to include the course name in the comment.
## CE-1 - Entering Employment Location Data for Individuals Trained

<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 102. 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 current reporting period by clicking on the drop-down menu under Column 8 and choosing one of the following options:

- Yes
- No

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

Enter the total number of participants who are employed in a primary care setting in Column 9. If none of the participants are employed in this setting, enter "0" in Column 9. If employment location data are not available, enter "N/A" in Column 9.

**Enter # of Individuals Trained by Employment Location (not mutually exclusive): Medically Underserved Community:**

Enter the total number of participants who are employed in a medically underserved community in Column 10. If none of the participants are employed in this setting, enter "0" in Column 10. If employment location data are not available, enter "N/A" in Column 10.
Enter # of Individuals Trained by Employment Location (not mutually exclusive): Rural Area:

Enter the total number of participants who are employed in a rural area in Column 11. If none of the participants are employed in this setting, enter "0" in Column 11. If employment location data are not available, enter "N/A" in Column 11.

Note: Individuals may 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 Columns 9, 10, and 11 are not meant to be mutually exclusive.

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
CE-1 - Selecting Primary Topic Area

Select the Course's Primary Topic Area: Select the primary topic area addressed in each course offered during the current 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
- Setting - Primary Care
- Other-Topic Not Listed
- Behavioral Health - Substance Abuse - General
- Behavioral Health - Treatment
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
- Behavioral Health - Substance Abuse - Opioids
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
Note: **Clinical Training-Public health** incorporates the following topic areas: *health promotion and disease prevention, health policy/advocacy, emergency preparedness and response, environmental health, nutrition, epidemiology, data collection and analysis etc.* **Clinical Training - Technology - Other** incorporates the following topic areas: *telemedicine, informatics, electronic medical records etc.*

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-1 - Selecting Primary Competency

Select the Primary Competency Addressed by the Course: Select the primary competency addressed in each course offered during the current reporting period by clicking on the drop-down menu in Column 13 (Block 12) and choosing one or more of the following options:

- Behavioral Health Integration
- Current and Emerging Health Issues
- Interprofessional Education
- Practice Transformation
- Social Determinants of Health

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 105. CE-2 - Selecting Profession and Discipline of Individuals Trained

**Course Title:** To complete the CE-2 subform, select the title of the course by clicking on the drop-down menu under Column 1 and choosing one of the available options.

**Select Profession and Discipline of Individuals Trained:** For each course title, select the profession and discipline of faculty and practicing professionals who participated in this training during the annual reporting period by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Home Health Aide
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other
- Behavioral Health - Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medical Interpreter
- Medicine - Anesthesiology
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Psychology Social Work or Substance Abuse/Addictions Counseling
- Dentistry - Dental Assistant
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Aerospace Medicine
- Medicine - Colon and Rectal Surgery
- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
Area Health Education Centers

- Medicine - General Preventive Medicine
- 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 informaticist
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver

- Medicine - Emergency Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Internal 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 - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Public Health - Disease Prevention & Health Promotion
Area Health Education Centers

Note: If "Other-Other" is selected, please specify the profession/discipline in the comments field. Please include the course name in the comment.

Note: Student disciplines are not available because Continuing Education courses are designed for faculty and practicing professionals, rather than individuals whose initial health professions education and training are still underway.

Example:
### CE-2 - Entering # Trained in the Profession and Discipline

<table>
<thead>
<tr>
<th>Enter # Trained in this Profession and Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3) Block 8</td>
</tr>
</tbody>
</table>

**Figure 106. 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.

**Note:** Student disciplines are not available because Continuing Education courses are for practicing professionals, rather than individuals whose health professions training is still underway.

**To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Printing Your Performance Report

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

Figure 107. Screenshot of Printing Your Performance Report
Submitting Your Performance Report

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

Figure 108. Screenshot of the Submit Report Page
2. After step 1, you will be directed to the Submit Report-Confirm page. On this page, check the box under the ‘Certification’ section and click the ‘Confirm’ button on the bottom right corner of your screen to submit your report to HRSA. You will receive a confirmation message on your next screen.

![Submit Report - Confirm]

Figure 109. Screenshot of the Submit Report - Confirm Page
Appendix A: Glossary

https://bhw.hrsa.gov/grants/resourcecenter/glossary
Appendix B: FAQs

General FAQs

When is the due date for the performance report?
Performance reports are due by July 31, 2019 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, 2018 - June 30, 2019.

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

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

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

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

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

I submitted a report last year using the 'not reported' option for trainee demographics. Why am I getting an error this year?
You may only select the 'not reported' option during the first reporting period for each trainee. Demographics are required information and grantees are expected to collect and report the information in all subsequent reports.

**FAQs about the INDGEN-PY form**

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

**FAQs about the Experiential Training (EXP) forms**

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

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

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

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

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

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

Why do I need to enter the zip code of my training sites?
The zip codes allow HRSA to identify sites that are in rural areas, medically underserved communities, and health professions shortage areas. Because the designation of each location may change over time, the zip code allows HRSA to adjust the way it labels a site.
Area Health Education Centers

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.