Instruction Manual for Grantees of the Centers of Excellence

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 COE grant program:
   - Increase the competitive applicant pool;
   - Enhance student performance;
   - Improve capacity for under-represented minority faculty development;
   - Improve information/curriculum design;
   - Facilitate faculty-student research; and
   - Carry out student training in providing healthcare services to under-represented communities.

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
Getting Started - How Performance Measure Data Fields Are Identified in the Forms

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

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

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

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

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

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

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

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

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

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

1. Begin PRGCA data entry early and submit your report prior to the deadline.
2. **Browser Settings:** Check your Internet browser and its settings by using ‘Recommended Settings’ tab on the EHB home screen within the yellow banner in the top left corner of the screen. Look for green check marks for all system requirements in order to meet system requirements and proceed.
3. **Reporting on Your Grant:** Several resources are available through HRSA’s “Reporting on Your Grant” link [http://bhw.hrsa.gov/grants/reporting/index.html](http://bhw.hrsa.gov/grants/reporting/index.html) including general EHB guidance as well as links to the performance measures and program manual.
4. **Resource Links:** Several resources are available via the ‘Resource’ tab on the EHB home screen including the following links:
   1. View Prior Period Data- Previously submitted PRGCA data are available in read-only mode
   2. Glossary- Current definitions of key terms
   3. Instruction Manual- Electronic copy of this program manual (can also be found on the HRSA.gov website)
5. **Video Recordings:**
6. **Grant Personnel:** Review your grant personnel listed in EHB and update this list as necessary. Ensure that listed personnel have appropriate authorizations (i.e., PRGCA submission, etc.). Make sure you have a backup person in place to submit your report!
7. **Sequence of Forms:** Complete PRGCA forms in the order they appear (i.e., complete EXP-1 prior to EXP-2)
8. **Saving and Validating:** You must click ‘Save and Validate’ in order to move to the next form. Save your work frequently (every 15-20 minutes) and print a hard copy of your report prior to submission.
9. **Government Project Officers:** Contact your Government Project Officer if you need further assistance on the content of your report.
10. **HRSA Call Center:** If you need additional assistance, contact the HRSA Call Center. If you have contacted the Call Center and are waiting for a reply, you should follow-up with them 48 hours after the initial contact. Have your ticket number ready (the same ticket number will be used at all tier levels now). Do not wait for the Call Center to return a phone call or email: **Call Center Phone Number: 877-Go4-HRSA/877-464-4772** or **Call Center Online Assistance Form click here.**
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>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>3</td>
<td>Setup Form</td>
<td>SetupForms</td>
<td>Faculty Development</td>
<td>COE-3, COE-4</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSSubforms</td>
<td>PC-3</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>LR-1a</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
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<td>6</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>LR-2</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-1</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-2</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>LegislativeRequirementsDemographicVariables-LRandDVSubforms</td>
<td>DV-3</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
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<td>Order</td>
<td>Type of Form</td>
<td>Parent Form</td>
<td>Form ID</td>
<td>Applicable Grant Purpose(s)</td>
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</tr>
<tr>
<td>10</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>IND-GEN</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>11</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>INDGEN-PY</td>
<td>COE-1, COE-2, COE-5</td>
</tr>
<tr>
<td>12</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-1</td>
<td>COE-5</td>
</tr>
<tr>
<td>13</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-2</td>
<td>COE-5</td>
</tr>
<tr>
<td>14</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESubforms</td>
<td>CDE-1</td>
<td>COE-6</td>
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<tr>
<td>15</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESubforms</td>
<td>CDE-2</td>
<td>COE-6</td>
</tr>
<tr>
<td>16</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-1a</td>
<td>COE-3</td>
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<td>17</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-1b</td>
<td>COE-3</td>
</tr>
<tr>
<td>18</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2a</td>
<td>COE-3</td>
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<td>19</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2b</td>
<td>COE-3</td>
</tr>
<tr>
<td>20</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-3</td>
<td>COE-4</td>
</tr>
</tbody>
</table>
Setup Forms
Setup Forms - Introduction
Grant Purpose – Setup
Selecting Grant Purpose(s)

To configure the BPMH system, please complete the Grant Purpose Setup form by selecting the specific type(s) of activities that were supported with grant funds during the annual reporting period (July 01, 2018 - June 30, 2019).

<table>
<thead>
<tr>
<th>Grant Purpose</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>COE-1: Increase the competitive applicant pool</td>
<td></td>
</tr>
<tr>
<td>COE-2: Enhance student performance</td>
<td></td>
</tr>
<tr>
<td>COE-3: Improve the capacity for faculty development</td>
<td></td>
</tr>
<tr>
<td>COE-4: Facilitate faculty and student research</td>
<td></td>
</tr>
<tr>
<td>COE-5: Carry out student training in providing health care services</td>
<td></td>
</tr>
<tr>
<td>COE-6: Improve information/curriculum design</td>
<td></td>
</tr>
</tbody>
</table>

Figure 3. Selecting Grant Purpose(s)

COE-1: Increase the competitive applicant pool:

COE-2: Enhance student performance:

COE-3: Improve the capacity for faculty development:

COE-4: Facilitate faculty and student research:

COE-5: Carry out student training in providing health care services:

COE-6: Improve information/curriculum design:
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.

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

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

Select Type of Training Program Offered:

The Training Program Setup form will configure all subsequent subforms specific to structured training programs. Select the type of training program offered through the grant during the current annual reporting period by clicking on the drop-down menu next to “Select Type of Training Program Offered” and choosing the following option:

- Non-degree structured training program (Structured)

![Warning: If you have no new structured training programs to add, proceed to the manual section entitled “Training Program Setup: Final Steps.”]
Training Program Setup - Loading Program Details

Click on the “Load Program Details” button. This will activate additional drop-down menus specific to the type of training program selected.
Training Program Setup - Adding Structured Training Program

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

Add Record

Figure 6. Training Program Setup - Adding Structured 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:

- Health Careers Enrichment Activities for URM
- Post-Baccalaureate Program
- Saturday Academy
- High School Academy Enrichment
- Pre-Matriculation Program
- Summer Program

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

Enter a name for the training activity and click on the "Add Record" button to save your entry. Repeat these steps to capture all structured training programs offered during the annual reporting period.
Select Training Activity Status in the Current Reporting Period

Figure 7. 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 current reporting period (i.e. June 30, 2019) by choosing one of the options below:

- Active
- Complete
- Inactive
- Ongoing

Note: Select Ongoing if a training program that did not conclude by June 30, 2019.

Note: Select Complete if a training program that concluded at some point during the current reporting period (July 01, 2018 - June 30, 2019).

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.
Faculty Development – Setup
Selecting Faculty Development Activities

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

<table>
<thead>
<tr>
<th>Faculty Development Activities</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structured Faculty Development Training Program</td>
<td></td>
</tr>
<tr>
<td>Faculty Development Activity</td>
<td></td>
</tr>
<tr>
<td>Faculty-Student Research or Collaboration Project</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 8. Selecting Faculty Development Activities**

Select the type(s) of faculty development activities supported with grant funds during the current reporting period. Options on the Faculty Setup form will be automatically pre-selected if you have previously reported one or more training programs or activities through the FD-1a, FD-2a, or FD-3 subforms.

**Structured Faculty Development Training Program:**

**Faculty Development Activity:**

**Faculty-Student Research or Collaboration Project:**

⚠️ **Warning:** You may uncheck “Faculty Development Activity” if you have nothing to report.

⚠️ **Warning:** You may uncheck “Structured Faculty Development Training Program” or “Faculty-Student Research or Collaboration Project” only if you have no training programs/projects still in progress.

**Reference:** Refer to the glossary for a definition of each type of faculty development activity.
To Complete the Form: Click on "Save and Validate" on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Program Characteristics—PC Subforms
PC Subforms - Introduction
PC-3 - Selecting Education Level(s) of Participants

Select Education Level(s) of Participants: Complete Column 4 (Block 1e) by selecting the education level(s) of participants who participated in each structured training program during the current reporting period. Choose all that apply from the following options:

- 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
- 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
- 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
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- Medicine - Neurology
- 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 - 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
- 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
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Medicine - Thoracic Surgery - Integrated
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other (e.g.; CNA; PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Nutritionist
- Other - Optometry
- Other - Podiatry
- Other - Speech Therapy
- 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
## Centers of Excellence

- 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 - 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
- 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 - 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
- Student - Dental School
- 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 - Women’s health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Pharmacy School
- Student - Podiatry School
- Student - Registered nurse (RN)
- Student - Undergraduate - Allied Health
- Student - Undergraduate - Public Health
Centers of Excellence

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Bureau of Health Workforce

- Student - Post-high school / Pre-college
- Student - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant
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 Clinical or Practicum Training Was Offered

Select Whether Clinical or Practicum Training Was Offered: Select whether each structured training program included a clinical training or practicum component by choosing one of the following options from the drop-down menu under Column 7 (Block 1h):

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

Select whether each structured training program provided participants with cultural competency-related training by choosing one of the following options from the drop-down menu under Column 8 (Block 1i):

- Yes
- No

**Figure 12. PC-3 - Selecting Whether Cultural Competency Training Was Offered**
### PC-3 - Selecting Type(s) of Partners/Consortia

#### Select Type(s) of Partners/Consortia Used to Offer this Training

<table>
<thead>
<tr>
<th>(9) Block 2</th>
</tr>
</thead>
</table>

**Figure 13. PC-3 - Selecting Type(s) of Partners/Consortia**

**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 structured training program during the current reporting period by clicking on the drop-down menu in Column 9 (Block 2) and choosing all that apply from the following options:

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Day and home care programs (i.e. Home Health)
- Federal Government - 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
- Nonprofit organization (non - faith based)
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Federal Government - Veterans Affairs
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health department - Local
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Local Government
- Nonprofit organization (faith - based)
- Nursing home
- Private/For - profit organization
- Senior Center
Health Resources and Services Administration
Bureau of Health Workforce

- Other
- Professional Associations
- State Government
- Tribal Government
- Tribal Organization

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

💡 **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.
Legislative Requirements & Demographic Variables—LR and DV Subforms

LR and DV - Introduction

⚠️ Warning: You must complete a LR-1, LR-2, DV-1, DV-2, and DV-3 subform for each structured training program supported through the grant during the annual reporting period.
**LR-1a: Trainees by Training Category**

**LR-1 - Entering Enrollees Count**

⚠️ **Warning:** Report counts of enrollees and program completers separately (i.e., program completers are NOT a subset of enrollees).

<table>
<thead>
<tr>
<th>Trainees by Training Category</th>
<th>Enter # of Enrollees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(2) Block 1</td>
</tr>
</tbody>
</table>

**Figure 14. LR-1 - Entering Enrollees Count**

**Trainees by Training Category: Enter # of Enrollees:** For ongoing programs, enter the number of students who participated in each structured training program in the textbox in Column 2 (Block 1).

⚠️ **Warning:** Do not count individuals who permanently left a training program before completion during the annual reporting period Columns 2 or 6 (Blocks 1 and 5). These individuals will be captured separately in Column 7 (Block 6).

💡 **Note:** For Completed Programs, enter a zero (“0”) in Column 2 (Block 1)
LR-1 - Entering Program Completers Count

⚠️ Warning: Report counts of enrollees and program completers separately (i.e., program completers are NOT a subset of enrollees).

<table>
<thead>
<tr>
<th>Trainees by Training Category</th>
<th>Enter # of Program Completers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(6)</td>
</tr>
<tr>
<td></td>
<td>Block 5</td>
</tr>
</tbody>
</table>

Figure 15. LR-1 - Entering Program Completers Count

**Trainees by Training Category: Enter # of Program Completers:** For completed programs, enter the number of students who completed each structured training program in the textbox in Column 6 (Block 5).

⚠️ Warning: Do not count individuals who permanently left a training program before completion during the annual reporting period Columns 2 or 6 (Blocks 1 and 5). These individuals will be captured separately in Column 7 (Block 6).

💡 Note: For ongoing programs, enter a zero ("0") in Column 6 (Block 5).
### LR-1 - Entering Attrition Information

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

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

<table>
<thead>
<tr>
<th>(7)</th>
<th>Block 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>(8)</td>
<td>Block 6a</td>
</tr>
</tbody>
</table>

**Figure 16. LR-1 - Entering Attrition Information**

**Attrition: Enter # of Individuals who left the Program before Completion:** Enter the number of students who permanently left each structured training program before completion during the current annual reporting period in the textbox in Column 7 (Block 6).

**Attrition: Enter # of URM who left the Program before Completion:** Of the individuals reported in Column 7 (Block 6), enter the number of underrepresented minority students who permanently left each structured training program before completion during the current annual reporting period in the textbox in Column 8 (Block 6a).

**Note:** Counts reported in Column 8 (Block 6a) are a subset of those reported in Column 7 (Block 6).

**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 Enrollees Count by Age and Gender

⚠️ Warning: Report counts of enrollees and program completers separately (i.e., program completers are NOT a subset of enrollees).

<table>
<thead>
<tr>
<th>Gender: Male</th>
<th>Gender: Female</th>
<th>Gender: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Enrollees</td>
<td>Enter # of Enrollees</td>
<td>Enter # of Enrollees</td>
</tr>
<tr>
<td>(3) Blocks 1-6</td>
<td>(8) Blocks 7-12</td>
<td>(13)</td>
</tr>
</tbody>
</table>

Figure 17. LR-2 - Entering Enrollees Count by Age and Gender

**Gender: Male: Enter # of Enrollees:** For each age group, enter the number of students who participated in each structured training program and were Males in Column 3 (Blocks 1-6). If there were no students in a specific age group, or if the program was completed, enter a zero (“0”) in the appropriate Gender/age block.

**Gender: Female: Enter # of Enrollees:** For each age group, enter the number of students who participated in each structured training program and were Females in Column 8 (Blocks 7-12). If there were no students in a specific age group, or if the program was completed, enter a zero (“0”) in the appropriate Gender/age block.

**Gender: Not Reported: Enter # of Enrollees:** Enter the number of students whose gender was not reported, by age group, who were enrolled in each training program during the current reporting period in the textboxes under Column 13. If there were no students in a specific age group, or if the program was completed, enter a zero (“0”) in the appropriate gender/age block.
Note: The total number of enrollees across Columns 3, 8, and 13 must be equal to the total number of enrollees entered in LR-1, Column 2 (Block 1).
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 18. LR-2 - Entering Program Completers Count by Age and Gender

**Gender: Male: Enter # of Program Completers:** For each age group, enter the number of students who completed each structured training program and were Males- enter counts in Column 7 (Blocks 49-54). If there were no completers in a specific age group, or if the program was marked as "ongoing", enter a zero (“0”) in the appropriate Gender/age block.

**Gender: Female: Enter # of Program Completers:** For each age group, enter the number of students who completed each structured training program and were Females- enter counts in Column 12 (Blocks 55-60). If there were no completers in a specific age group, or if the program was marked as "ongoing", enter a zero (“0”) in the appropriate Gender/age block.

**Gender: Not Reported: Enter # of Program Completers:** Enter the number students whose gender was not reported, by age group, who completed each training program during the annual reporting period in the textboxes under Column 17. If there were no completers in a specific age group, or if the program was marked as "ongoing", enter a zero (“0”) in the appropriate Gender/age block.

**Note:** The total number of completers across Columns 7, 12, and 17 must be equal to the total number of completers entered in LR-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.
## DV-1: Trainees by Racial & Ethnic Background

### DV-1 - Entering Enrollees 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 Enrollees</td>
<td>Enter # of Enrollees</td>
<td>Enter # of Enrollees</td>
</tr>
<tr>
<td>(3) Blocks 1-7</td>
<td>(8) Blocks 36-42</td>
<td>(13)</td>
</tr>
</tbody>
</table>

**Figure 19. DV-1 - Entering Enrollees Count by Race and Ethnicity**

**Ethnicity: Hispanic/Latino: Enter # of Enrollees:** For each racial category, enter the number of students who participated in each structured training program and were Hispanic/Latino in Column 3 (Blocks 1-7). If there were no students in a specific racial category, or if the program was marked as complete, enter a zero (“0”) in the appropriate ethnicity/race block.

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Enrollees:** For each racial category, enter the number of students who participated in each structured training program and were Non-Hispanic/Latino in Column 8 (Blocks 36-42). If there were no students in a specific racial category, or if the program was marked as complete, enter a zero (“0”) in the appropriate ethnicity/race block.

**Ethnicity: Not Reported: Enter # of Enrollees:** Enter the number students whose ethnicity was not reported who participated in each training program in Column 13. If there were no students in a specific racial category, or if the program was marked as complete, enter a zero (“0”) in the appropriate ethnicity/race block.

---

**Note:** The sum of enrollees across Columns 3, 8, and 13 must be equal to the number of enrollees entered in LR-1, Column 2 (Block 1).
**DV-1 - Entering Program Completers Count by Race and Ethnicity**

<table>
<thead>
<tr>
<th></th>
<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>(7) Blocks 29-35</td>
<td>(12) Blocks 64-70</td>
<td>(17)</td>
</tr>
</tbody>
</table>

Figure 20. DV-1 - Entering Program Completers Count by Race and Ethnicity

**Ethnicity: Hispanic/Latino: Enter # of Program Completers:** For each racial category, enter the number of students who completed each structured training program and were Hispanic/Latino in Column 7 (Blocks 29-35).

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Program Completers:** For each racial category, enter the number of students who completed each structured training program and were Non-Hispanic/Latino in Column 12 (Blocks 64-70).

**Ethnicity: Not Reported: Enter # of Program Completers:** Enter the number of students whose ethnicity was not reported by race who completed each training program during the current reporting period in the textboxes under Column 17.

*Note: If there were no completers in a specific racial category, or if the program was marked as "ongoing", enter a zero (“0”) in the appropriate ethnicity/race block.*

*Note: The total number of completers across Columns 7, 12, and 17 must be equal to the total number of completers entered in LR-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.
DV-2: Trainees from a Disadvantaged Background

DV-2 - Entering Enrollees Count from Disadvantaged Background

<table>
<thead>
<tr>
<th>Enrollees</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>(2) Block 1</td>
<td>(3) Block 2</td>
</tr>
</tbody>
</table>

Figure 21. DV-2 - Entering Enrollees Count from Disadvantaged Background

**Enrollees: Enter Total # from Disadvantaged Background:** Enter the total number of students from disadvantaged backgrounds who participated in each structured training program during the current reporting period in the textbox in Column 2 (Block 1).

**Enrollees: Enter # from Disadvantaged Background who are not URM:** Enter the total number of students from disadvantaged backgrounds who participated in each structured training program during the current reporting period and were NOT under-represented minorities in the textbox in Column 3 (Block 2).

**Note:** Counts reported in Column 3 (Block 2) are a subset of counts reported in Column 2 (Block 1).

**Reference:** Refer to the glossary for a definition of disadvantaged background and underrepresented minority.
**DV-2 - Entering Program Completers Count from Disadvantaged Background**

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

**Figure 22. DV-2 - Entering Program Completers Count from Disadvantaged Background**

**Program Completers: Enter Total # from Disadvantaged Background:** Enter the total number of students from disadvantaged backgrounds who completed each structured training program during the current reporting period in the textbox in Column 10 (Block 9).

**Program Completers: Enter # from Disadvantaged Background who are not URM:** Next, enter the total number of students from disadvantaged backgrounds who completed each structured training program during the current reporting period and were NOT underrepresented minorities in the textbox in Column 11 (Block 10).

*Note: Counts reported in Column 11 (Block 10) are a subset of counts reported in Column 10 (Block 9).*

*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: Trainees from a Rural Background

DV-3 - Entering Enrollees Count from Rural Residential Background

<table>
<thead>
<tr>
<th>Trainees from Rural Residential Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Enrollees from a Rural Background</td>
</tr>
<tr>
<td>(2) Block 1</td>
</tr>
</tbody>
</table>

Figure 23. DV-3 - Entering Enrollees Count from Rural Residential Background

Trainees from Rural Residential Background: Enter # of Enrollees from a Rural Background: Enter the total number of students from a rural residential background who participated in each structured training program during the current reporting period in the textbox in Column 2 (Block 1).

Reference: Refer to the glossary for a definition of rural residential background.
DV-3 - Entering Program Completers Count from Rural Residential Background

Trainees from Rural Residential Background: Enter # of Program Completers from a Rural Background: Enter the total number of students from a rural residential background who completed each structured training program during the annual reporting period in the textbox in Column 10 (Block 9).

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.
IND-GEN: Individual Characteristics

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**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>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?</td>
<td>Yes (complete IND-GEN) No (click Save and Validate button to proceed to the next form)</td>
</tr>
</tbody>
</table>

---

**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 under the column labeled "Type of Training Program" and choosing one of the available options. The options available under "Type of Training Program" will prepopulate with information entered and saved in the Training Program Setup Form.

Note: The option for "Other" that is available in the drop-down menu under the column labeled "Type of Training Program" should only be selected for faculty who received a BHW-funded financial award during the annual reporting period for participating in faculty development activities or for faculty and students who received a BHW-funded stipend for participating in a faculty-student research project.
IND-GEN - Entering Trainee Unique ID

![Trainee Unique ID](image)

**Figure 27. IND-GEN - Entering Trainee Unique ID**

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

⚠️ **Warning:** It is the responsibility of each grantee to keep a log of all unique IDs used, as these will be required to provide annual updates for each individual and 1-year follow-up data for students.
IND-GEN - Selecting Individual's Training or Awardee Category

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

- Enrollee (campus-based only)
- Enrollee (distance learning only)
- Enrollee (hybrid)
- Faculty
Select Individual's Enrollment / Employment Status: Select each individual’s current enrollment or employment status by clicking on the drop-down menu under Block 3 and choosing one of the following options:

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

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

- Female
- Male
- Not Reported

Note: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
Enter Year of Birth: Enter each individual’s year of birth in the textbox under Column 6a.

- 1917
- 1920
- 1923
- 1926
- 1929
- 1932
- 1935
- 1938
- 1941
- 1944
- 1947
- 1950
- 1953
- 1956
- 1959
- 1962
- 1965
- 1968
- 1971
- 1974
- 1977
- 1918
- 1921
- 1924
- 1927
- 1930
- 1933
- 1936
- 1939
- 1942
- 1945
- 1948
- 1951
- 1954
- 1957
- 1960
- 1963
- 1966
- 1969
- 1972
- 1975
- 1978
• 1980 • 1981 • 1982
• 1983 • 1984 • 1985
• 1986 • 1987 • 1988
• 1989 • 1990 • 1991
• 1992 • 1993 • 1994
• 1995 • 1996 • 1997
• 1998 • 1999 • 2000
• 2001 • 2002 • 2003
• 2004 • 2005 • 2006
• 2007 • 2008 • 2009
• 2010 • 2011 • 2012
• 2013 • 2014 • 2015
• 2016 • 2017 • Not Reported

Note:  If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
IND-GEN - Selecting Individual's Ethnicity

Select Individual's Ethnicity: Select each individual’s ethnicity by clicking on the drop-down menu under Block 6 and choosing one of the following options:

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

Note: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
IND-GEN - Selecting Individual's Race

Select Individual's Race: Select each individual’s race by clicking on the drop-down menu under Block 7 and choosing all that apply from the following options. You may select more than one (1) option for individuals of multiple races:

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

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

Note: If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.
IND-GEN - Selecting if Individual is from a Rural Residential Background

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

- Yes
- No
- Not Reported

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

Reference: Refer to the glossary for a definition of 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 under Column 10 (Block 9) and choosing one of the following options:

- Yes
- No
- Not Reported

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

Reference: Refer to the glossary for a definition of disadvantaged background.
**Select Individual's Veteran Status:** Select each individual's current veteran status by clicking on the drop-down menu under Block 10 and choosing one of the following options:

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

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

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

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

Select Whether Individual Received BHW Financial Award? Enter Individual's Financial Award Amount (BHW funds only)

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

Figure 37. IND-GEN - Entering BHW-Funded Financial Award Information

Select Whether Individual Received BHW Financial Award?: Select whether each individual received a BHW-funded financial award during the annual reporting period by clicking on the drop-down menu in Column 12 (Block 11) and choosing one of the following options:

- Yes
- No

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

Enter the total amount of BHW dollars provided during the annual reporting period in the textbox in Column 13. If the individual did not receive a BHW-funded financial award, enter "0" in the textbox in Column 13.

Note: The amount reported under the column labeled "Stipend" should be the total monies from the grant provided to an individual for the purposes of participating in the training program that was selected under the column labeled "Type of Training Program." The total amount...

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reported should account for all BHW dollars including those applied to tuition, fees, and reasonable living expenses, as allowed by federal statutes and regulations. Do not include dollars that came from other sources of funding. If an individual participated in more than one (1) program and received stipends for each program, multiple entries on IND-GEN are required to capture participation and stipend amounts for each program separately.
**IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding**

**Enter # of Academic Years the Individual has Received BHW Funding**

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:

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

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

**Note:** If an individual has received money for ½ an academic year, please round up to the nearest whole number. For example, if a student or faculty member has received a financial award for 1 ½ years, please enter 2 in Column 22 (Block 12).

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

![Figure 39. IND-GEN - Selecting Individual's Academic or Training Year](image)

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

- Faculty
- Non-degree Training Program Year 2
- Non-degree Training Program Year 3
- Non-degree Training Year 1
- N/A

![Note: For faculty or preceptors, select N/A.](image)
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 one of the available 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
- 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 - Clinical Social Work
- Behavioral Health - Other Psychology
- Behavioral Health - Psychology
- 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
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated
- 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 - Anesthesiology
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Medical Genetics
- Medicine - Nuclear Medicine
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
Centers of Excellence

- 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
- Nursing - NP - Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Other (e.g., CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Home Health Aide
- Other - Midwife (non-nurse)
- Other - Office/Support Staff
- Other - Physical Therapy
- Other - Respiratory Therapy
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic
- Medicine - Thoracic Surgery - Integrated
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Lay and Family Caregiver
- Other - Nutritionist
- Other - Optometry
- Other - Podiatry
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General
- Medicine - Urology
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse Assistant/Patient Care Associate (PCA)
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Medical Assistant
- Other - Occupational Therapy
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Veterinary Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
Centers of Excellence

- Physician Assistant
- Public Health - Environmental 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 gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Psychiatric/Mental health
- Student - Nurse Anesthetist
- Student - Nurse Researchers/Scientists
- Student - Optometry
- Student - Physician Assistant
- Student - Public Health Nurse
- Student - Undergraduate - Allied Health
- 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
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Home Health Aide
- Student - Medical Assistant
- Student - NP - Acute care adult gerontology
- 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 - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant
- 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 - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
- Student - NP - Pediatrics
- Student - Nurse Administrator
- Student - Nurse midwife
- Student - Occupational Therapy
- Student - Physical Therapy
- Student - Post - high school / Pre - college
- Student - Speech Therapy
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician
• Student - Undergraduate - Public Health

Note: Student-level disciplines, denoted with a prefix of "Student—" are intended only for students.

Note: Provider-level disciplines, denoted with a prefix containing a profession (e.g., "Nursing—") are intended only for faculty.
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.

Training in a Primary Care Setting: Select Whether Individual Received Training:
Select whether each student received clinical or experiential training in a primary care setting during the annual 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 student did receive clinical or experiential training in a primary care setting, enter the total number of hours spent in this type of setting during the annual reporting period in the textbox under Column 29 (Block 17a).
- If the student did NOT receive clinical or experiential training in a primary care setting, leave the textbox blank under Column 29 (Block 17a).
Warning: For Faculty, select "N/A" in the drop-down menu under Block 17.
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.

![Figure 43. IND-GEN - Entering Training Information in a Medically Underserved Community](image)

Training in a Medically Underserved Community

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

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.

Warning: For Faculty, select "N/A" in the drop-down menu under Block 18.
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 44. 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.
Warning: For Faculty, select "N/A" in the drop-down menu under Block 19.
IND-GEN — Selecting Student Services Information

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

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

Figure 45. 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
- N/A
- 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
- None of the above
- Academic support program
- Group tutoring
- Other academic support service
- Time management training
- N/A
Select Whether Individual Left the Program Before Completion: Select whether each individual permanently left their training program before completion during the annual reporting period by clicking on the drop-down menu in Column 36 (Block 21) and choosing one of the following options:

- Yes
- No
IND-GEN — 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
- Medical leave of absence
- Transfer to another institution
- Other
- N/A
- Change in major
- Financial obligations
- Military/Active duty
- Transportation difficulties
- None of the Above

Figure 47. IND-GEN — Selecting Reason for Attrition or Inactive Status
**IND-GEN - Entering Graduation/Completion Information**

<table>
<thead>
<tr>
<th>Select Whether Individual Graduated/Completed the Program</th>
<th>Select Degree Earned</th>
<th>Select whether individual earned degree on-schedule/on-time</th>
<th>Select whether individual took and passed a certifying examination on the first attempt</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>(38a)</td>
<td>(38b)</td>
<td>(39) Block 22b</td>
</tr>
</tbody>
</table>

**Figure 48. IND-GEN - Entering Graduation/Completion Information**

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

- Yes
- No

**Select Degree Earned:**

- If a individual graduated from their degree program during the reporting period, select the type of degree earned by clicking on the drop-down menu in Column 38 (Block 22a) and choosing one of the options from the list below.
- If the individual did not graduate, select "N/A" under Block 22a.

- AA
- Bachelor's Degree not otherwise specified
- BSW
- DDS/MPH
- DNAP
- AS
- BPH
- DC
- DDS/MSPH
- DNP
- BA
- BS
- DDS
- DMD
- DNSc
Select whether individual earned degree on-schedule/ on-time:

Select whether each individual earned their degree on-schedule/on-time by clicking on the drop-down menu under Column 38a and choosing one of the options below.

(Note- For **Associates Degree** programs, on-schedule/on-time completion is defined as 3 years or less)

(Note- For **Bachelor's Degree** programs, on-schedule/on-time completion is defined as 6 years or less)

(Note- For **Health Professions** programs, on-schedule/on-time completion is defined as 5 years or less)

(Note- For single or dual track **Doctoral** programs, on-schedule/on-time completion is defined as 7-10 years or less)

- Yes
- No
Select whether individual took and passed a certifying examination on the first attempt: Select whether each individual took and passed a certifying examination of the first attempt by clicking on the drop-down menu under Column 38b and choosing one of the following options:

- Yes
- No
- N/A

Select Individual's Post-Graduation/Completion Intentions:

- If a student did complete their training program during the annual reporting period, select “Yes” in Column 37 (Block 22) and select the student’s training or employment intentions at the time of completion by clicking on the drop-down menu in Column 39 (Block 22b) and choosing all that apply from the following options:
  - Individual intends to apply to a health professions training program within the next 12 months
  - Individual intends to become employed or pursue further training in a primary care setting
  - Individual intends to remain enrolled in their health professions training program
  - Not Reported
  - 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
  - None of the above
  - N/A

Warning: For Faculty, select "N/A" in the drop-down menu under Block 22b.

Warning: “None of the above”, “Not reported”, and “N/A” cannot be selected in combination with any other option.
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
INDGEN-PY: Individual Prior Year

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

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

**Figure 49. 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 student who received a BHW-funded financial award and completed their training program one year prior to this report by clicking on the drop-down menu in Column 13 (Block 23) and choosing one of the following options:

- Yes
- No

Select Individual's Current Training/Employment Status: Select the individual’s current training/employment status by clicking on the drop-down menu in Column 14 and choosing all that apply. If current training/employment data are not available, select “N/A” in Column 14.

- Individual applied and was accepted in a health professions training program
- Individual is currently employed or is pursuing further training in a medically underserved community
- Individual is currently providing treatment or wrap-around services to individuals with substance use disorders
- Individual applied and was not accepted in a health professions training program
- Individual is currently employed or is pursuing further training in a primary care setting
- Individual applied to a health professions training program but has not received acceptance
- Individual is currently employed or is pursuing further training in a rural setting
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.”
Centers of Excellence

- Academic Institution
- Critical Access Hospital
- Other Clinical Training Site
- None of the Above

- Area Health Education Center
- FQHC or Look-Alike
- Rural Health Clinic
- N/A

**Warning:** “None of the above” and “N/A” cannot be selected in combination with any other option.

*Note: One-year post-completion employment data are not required for faculty.*

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

EXP - Introduction

1. Purpose: The EXP 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.
  - If "Yes" was selected, the BPMH system will prepopulate certain blocks in the EXP-2 subform.
  - If "No" was selected, the BPMH system will not include the site as an option in the EXP-2 subform.

**Warning:** Complete the EXP-1 and EXP-2 subforms only for sites used to train individuals who appear on the LR-DV subforms.
**EXP-1: Training Site Setup**

**EXP-1 - Entering Site Name**

![Figure 50. EXP-1 - Entering Site Name](image)

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).
EXP-1 - Selecting Whether the Site was Used in the Current Period

Select Whether the Site was Used in the Current Reporting Period: Select whether each site was used during the current annual reporting period by clicking on the drop-down menu located 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 "No" is selected in Column 2, then the training site will not populate in the dropdown menus on the EXP-2 subform.

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.
Select Type of Site Used: Select the type of sites used to train students during the annual 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
- Dental Services
- Geriatric ambulatory care and comprehensive units
- Federal Government - Department of Defense / Military
- Hospital
- Indian Health Service (IHS) site
- Local health department
- Nurse Managed Health Clinics
- Other
- Physician Office
- Senior Centers
- 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
- Federal Government Office or Agency
- Geriatric Behavioral or Mental Health Units
- Hospice
- International nonprofit/nongovernmental organization
- Long-term Care Facility
- National health association
- National health association or affiliate
- Other community health center (e.g.; free clinic)
- School-based clinic
- Residential Living Facility
- State Government Office or Agency
- Acute care services
- Community-based organization
- Community Health Center (CHC)
- Community Behavioral Health Center
- Extended care facilities
- Federal and State Bureau of Prisons
- FQHC or look-alike
- Geriatric consultation services
- Federal Government - Other
- Independent Living Facility
- Local Government Office or Agency
- Mobile Clinic/Site
- 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)
- State Health Department
| Centers of Excellence | | |
|----------------------|------------------|
| Health Resources and Services Administration | Annual Performance Report |
| Bureau of Health Workforce | Academic Year 2018-2019 |
| • Rural Health Clinic | • Tribal Health Department |
| • Surgery Clinic | • Veterans Affairs Healthcare (e.g. VA Hospital or clinic) |
| • Tribal Organization | • 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
**EXP-1 - Selecting Type(s) of Partners/Consortia**

<table>
<thead>
<tr>
<th>Select Type(s) of Partners/Consortia used to Offer Training at this Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5)</td>
</tr>
</tbody>
</table>

**Figure 54. EXP-1 - Selecting Type(s) of Partners/Consortia**

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

- Academic department - outside the institution
- Day and home care programs (i.e. Home Health)
- Alzheimer's Disease Resource Centers
- Educational institution (Grades K - 12)
- Geriatric ambulatory care and comprehensive units
- 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
- Federal Government - Veterans Affairs
- Federal Government - Other HRSA Program
- Federal Government - AHRQ
- Federal Government - FDA
- Federal Government - Other
- Hospital
- Long-term care facility
- Other
- Quality improvement organization
- Tribal Government
- Health department - Local
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Community Health Center (CHC)
- Alzheimer's Association/Chapters
- Area Agencies on Aging
- Federal Government - Department of Defense/Military
- Geriatric Behavioral or Mental Health Units
- 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
- Private/For-profit organization
Centers of Excellence

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

**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.
Select Type(s) of Vulnerable Population Served at this Site

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

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

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

<table>
<thead>
<tr>
<th>Enter Zip Code</th>
<th>City</th>
<th>State</th>
<th>Four Digit Zip Code Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>(8)</td>
<td>(9)</td>
<td>(10)</td>
<td>(11)</td>
</tr>
</tbody>
</table>

Figure 56. 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](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 - Selecting Whether the Training Site Implements Interprofessional Education and/or Practice

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

- Yes
- No

Figure 57. EXP-1 - Selecting Whether the Training Site Implements Interprofessional Education and/or Practice
EXP-1 - Selecting any HHS Priorities Addressed at this Site

Select any HHS Priorities Addressed at this Site:

Using the dropdown menu, 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

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.
EXP-2 - Selecting Profession and Discipline of Individuals Trained

Select Profession and Discipline of Individuals Trained:

Select the profession(s) and discipline(s) of students trained for each training program/site during the current reporting period (both “Principal” trainees and “Other Interprofessional” trainees who participated in team-based care with the principal trainees) by clicking on the drop-down menu in Column 3 (Block 3) and choosing one of the options below. Repeat as necessary to identify each profession/discipline of all individuals trained at each program/site.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- 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
- Behavioral Health - Clinical Social Work
- 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
- Behavioral Health - Counseling Psychology
- 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
- Medicine - Internal Medicine/Family Medicine
- Medicine - Neurological Surgery
- Medicine - Obstetrics and Gynecology
- Student - Physician Assistant
Centers of Excellence

- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Medicine - Occupational Medicine
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical Medicine
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Medicine - Surgery - General Medicine
- 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 - Women's health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Plastic Surgery - Integrated Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Radiation Oncology
- Medicine - Thoracic Surgery
- Medicine - Vascular Surgery - Integrated Medicine
- 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
- Nursing - NP - Neonatal
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Midwife
- Other - Occupational Therapy
- Other - Other
- Other - Podiatry
- Other - Recreational Therapy
- Other - Respiratory Therapy
- Other - Unknown
- Public Health - Biostatistics
- Medicine - Otolaryngology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Medicine - Radiology - Diagnostic Medicine
- Medicine - Thoracic Surgery - Integrated Medicine
- 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 - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- 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
Centers of Excellence

- Other - Medical Laboratory Technology
- Other - Nutritionist
- Other - Optometry
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Research
- Other - Speech Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Health Policy & Management
- Public Health - Nutrition
- Student - Nursing - Nurse midwife
- Student - Alternative/Complementary Nursing
- Student - CNL - Generalist
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Community Health Nursing
- Student - Dental School
- Student - Graduate - Allied Health
- Student - Graduate - Nursing
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Health Informatics
- Student - Law School
- Student - Medical School
- Student - NP - Acute care adult gerontology
- Public Health - Epidemiology
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Student - Nursing - Registered nurse (RN)
- Student - Certified Nursing Assistant
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women’s health
- Student - Dental Assistant
- Student - Dietician
- Student - Graduate - Behavioral Health
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Other Behavioral Health
- Student - Graduate - Radiological Assistant
- Student - Home Health Aide
- Student - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Midwife
- 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 - Nursing Pre-licensure
- Student - Pharmacy
- Student - Podiatry School
- Student - Registered nurse (RN)
- Student - Speech Therapy
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Administration
- Public Health - Injury Control & Prevention
- Student - Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - 9 - 12 (secondary)
- Student - Chiropractic School
- Student - CNS - Family
- Student - CNS - Pediatrics
- Student - CNS - Women’s health and pediatrics
- Student - Dental Hygiene
- Student - EMT
- Student - Graduate - Clinical Laboratory Services
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Graduate - Social Work
- Student - K - 8 (primary)
- Student - Medical Assistant
- Student - Midwife (non - nurse)
- Student - NP - Adult
- Student - NP - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
Centers of Excellence

- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Nurse Administrator
- Student - Nurse Midwife
- Student - Nursing Informatics
- Student - Optometry
- Student - Physical Therapy
- Student - Public Health Nurse
- Student - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant
- Student - Undergraduate - Other
- Student - Undergraduate - Radiological Technician

Note: Do not select professions/disciplines for faculty, site staff, or other non-trainees.
**EXP-2 - Entering # Trained in the Profession and Discipline**

**Figure 61. EXP-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>(4) Block 3</td>
</tr>
</tbody>
</table>

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

In Column 4 (Block 3), enter the number of COE trainees in the profession and discipline selected in the previous step that were trained at each site during the current annual reporting period.

💡 *Note: Counts provided should be based on individuals reported on LR-1*
EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

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

Figure 62. EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care:

In Column 5 (Block 8), enter the number of all "other interprofessional" trainees who participated in team-based care alongside the Principal trainees. Counts provided should be based on individuals not reported on LR-1 form non-HRSA-funded programs.

⚠ Warning: Do not count faculty or non-trainees.
## EXP-2 - Adding Individuals Trained Example 1

### Table: EXP-2 - Adding Individuals Trained Example 1

<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>

---

**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).
### 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).

<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 Interprofessional 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></td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student-Medical School</td>
<td>Block 1</td>
<td>Student-Medical School</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Block 3</td>
<td>Block 3</td>
<td></td>
<td></td>
<td></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></td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student-Pharmacy School</td>
<td>Block 1</td>
<td>Student-Pharmacy School</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Block 3</td>
<td>Block 3</td>
<td></td>
<td></td>
<td></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></td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student-Medical School</td>
<td>Block 1</td>
<td>Medicine - Psychiatry</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Block 3</td>
<td>Block 3</td>
<td></td>
<td></td>
<td></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></td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student-Medical School</td>
<td>Block 1</td>
<td>Student-Medical School</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Block 3</td>
<td>Block 3</td>
<td></td>
<td></td>
<td></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>
<tr>
<td></td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student-Pharmacy School</td>
<td>Block 1</td>
<td>Student-Pharmacy School</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Block 3</td>
<td>Block 3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 64. EXP-2 - Adding Individuals Trained Example 2
• 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).
### EXP-2 - Adding Individuals Trained Example 3

#### Figure 65. EXP-2 - Adding Individuals Trained Example 3

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practicum/Field Placement</td>
<td>Site 1</td>
<td>Student-MedicalSchool</td>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>Practicum/Field Placement</td>
<td>Site 2</td>
<td>Student-MedicalSchool</td>
<td>10</td>
<td>22</td>
</tr>
<tr>
<td>Practicum/Field Placement</td>
<td>Site 2</td>
<td>Student-MedicalSchool</td>
<td>10</td>
<td>22</td>
</tr>
</tbody>
</table>

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

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

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

Warning: Site settings are linked to the name of training sites in EXP-1. To change the associated site settings 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

Purpose of CDE Subforms:

- CDE-1: Collects information about newly developed or enhanced courses. Characteristics include development status, delivery mode, class duration, etc.
- CDE-2: Collects the number of individuals who participated in the CDE courses and training activities (grouped by course and primary discipline).

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

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

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

Figure 68. CDE-1 - Setup

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

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

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

![Diagram of CDE-1](image)

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.

![Diagram of CDE-1 Setup form](image)

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

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

- Academic course
- Continuing Education courses
- Field placement/practicum
- Training/Workshop for health professions students fellows or residents
- Clinical rotation
- Faculty development programs or activities
- Grand rounds
CDE-1 - Selecting whether Course was Newly Developed or Enhanced

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

- Enhanced
- Newly developed

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

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

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

Figure 72. CDE-1 - Entering Development/Enhancement Status

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

- Developed not yet implemented
- Implemented
- Under development
Select Delivery Mode Used to Offer this Course or Training Activity: 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
- Hybrid
- Distance learning (Online Webinar)
- Experiential/Field-based
- Simulation-based Training
Select Primary Topic Area: Select the primary topic area for each course or training activity that was developed or enhanced by clicking on the drop-down menu under Column 11 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - 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: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

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

Figure 76. 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 - Marriage and Family Therapy
• Behavioral Health - Pastoral/Spiritual Care
• Dentistry - Dental Hygiene
• Dentistry - Oral Surgery Dentistry
• Dentistry - Pathology Dentistry
• Dentistry - Prosthodontic Dentistry
• Medicine - Allergy and Immunology
• Medicine - Dermatology
• Medicine - General Preventive Medicine
• Medicine - Integrative Medicine
• Medicine - Internal Medicine/Pediatrics
• Medicine - Neurology
• Medicine - Occupational Medicine
• Medicine - Other
• Medicine - Physical Medicine and Rehabilitation
• Medicine - Preventive Medicine/Aerospace Medicine
• Medicine - Preventive Medicine/Occupational Medicine
• Medicine - Psychiatry
• Medicine - Surgery - General
• Medicine - Urology
• Nursing - CNL - Generalist

• Behavioral Health - Clinical Social Work
• Behavioral Health - Other Psychology
• Behavioral Health - Psychology
• Dentistry - Endodontic Dentistry
• Dentistry - Orthodontic Dentistry
• Dentistry - Pediatric Dentistry
• Dentistry - Public Health 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
• 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

• 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 - 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
• 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 - Family
• Nursing - NP - Neonatal
### Centers of Excellence

**Health Resources and Services Administration**  
**Bureau of Health Workforce**  
**Academic Year 2018-2019**

<table>
<thead>
<tr>
<th>Professional Area</th>
<th>Field/Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursing - CNS - Geropsychiatric</td>
<td></td>
</tr>
<tr>
<td>Nursing - CNS - Psychiatric/Mental health</td>
<td></td>
</tr>
<tr>
<td>Nursing - Community health nursing</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Acute care adult gerontology</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Adult gerontology</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Family Psychiatric/Mental Health</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Pediatrics</td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse administrator</td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse midwife</td>
<td></td>
</tr>
<tr>
<td>Nursing - Public health nurse</td>
<td></td>
</tr>
<tr>
<td>Other - Chiropractor</td>
<td></td>
</tr>
<tr>
<td>Other - Facility Administrator</td>
<td></td>
</tr>
<tr>
<td>Other - Health Informatics/Health Information Technology</td>
<td></td>
</tr>
<tr>
<td>Other - Midwife (non - nurse)</td>
<td></td>
</tr>
<tr>
<td>Other - Optometry</td>
<td></td>
</tr>
<tr>
<td>Other - Profession Not Listed</td>
<td></td>
</tr>
<tr>
<td>Other - Allied Health</td>
<td></td>
</tr>
<tr>
<td>Other - Physical Therapy</td>
<td></td>
</tr>
<tr>
<td>Public Health - Biostatistics</td>
<td></td>
</tr>
<tr>
<td>Public Health - Epidemiology</td>
<td></td>
</tr>
<tr>
<td>Public Health - Injury Control &amp; Prevention</td>
<td></td>
</tr>
<tr>
<td>Student - Chiropractic School</td>
<td></td>
</tr>
<tr>
<td>Student - CNL - Generalist</td>
<td></td>
</tr>
<tr>
<td>Student - CNS - Geropsychiatric</td>
<td></td>
</tr>
<tr>
<td>Student - CNS - Psychiatric/Mental health</td>
<td></td>
</tr>
<tr>
<td>Student - Community Health Nursing</td>
<td></td>
</tr>
<tr>
<td>Student - Dental School</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Acute care pediatric</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Emergency care</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Geropsychiatric</td>
<td></td>
</tr>
<tr>
<td>Nursing - NP - Psychiatric/Mental health</td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse educator</td>
<td></td>
</tr>
<tr>
<td>Nursing - Nurse practitioner</td>
<td></td>
</tr>
<tr>
<td>Nursing - Registered Nurse</td>
<td></td>
</tr>
<tr>
<td>Other - Community Health Worker</td>
<td></td>
</tr>
<tr>
<td>Other - First Responder/EMT</td>
<td></td>
</tr>
<tr>
<td>Other - Lay and Family Caregiver</td>
<td></td>
</tr>
<tr>
<td>Other - Nutritionist</td>
<td></td>
</tr>
<tr>
<td>Other - Pharmacy</td>
<td></td>
</tr>
<tr>
<td>Other - Respiratory Therapy</td>
<td></td>
</tr>
<tr>
<td>Other - Occupational Therapy</td>
<td></td>
</tr>
<tr>
<td>Other - Speech Therapy</td>
<td></td>
</tr>
<tr>
<td>Public Health - Disease Prevention &amp; Health Promotion</td>
<td></td>
</tr>
<tr>
<td>Public Health - Health Policy &amp; Management</td>
<td></td>
</tr>
<tr>
<td>Public Health - Social &amp; Behavioral Sciences</td>
<td></td>
</tr>
<tr>
<td>Student - 9 - 12 (secondary)</td>
<td></td>
</tr>
<tr>
<td>Student - CNS - Adult gerontology</td>
<td></td>
</tr>
<tr>
<td>Student - CNS - Neonatal</td>
<td></td>
</tr>
<tr>
<td>Student - CNS - Women's health</td>
<td></td>
</tr>
<tr>
<td>Student - Dental Assistant</td>
<td></td>
</tr>
<tr>
<td>Student - Diploma/Certificate</td>
<td></td>
</tr>
<tr>
<td>Student - Graduate - Nursing Doctorate</td>
<td></td>
</tr>
<tr>
<td>Student - Graduate - Other Behavioral Health</td>
<td></td>
</tr>
</tbody>
</table>
Centers of Excellence

- Student - Graduate - Clinical Laboratory Services
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Home Health Aide
- Student - Medical Assistant
- Student - NP - Acute care adult gerontology
- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- 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 - Graduate - Radiological Assistant
- Student - K - 8 (primary)
- Student - Medical School
- Student - NP - Acute care pediatric
- Student - NP - Adult Psychiatric/Mental health
- Student - NP - Family
- Student - NP - Neonatal
- Student - NP - Psychiatric/Mental health
- Student - Nurse Anesthetist
- Student - Nurse Researchers/Scientists
- Student - Optometry
- Student - Physician Assistant
- Student - Public Health Nurse
- Student - Rehabilitation Therapy
- Student - Undergraduate - Clinical Laboratory Services
- Student - Undergraduate - Radiological Assistant
- Student - Podiatry School
- 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

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

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

Enter # Trained in this Profession and Discipline

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.
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

Select whether Course or Training Activity was Newly Developed or Enhanced: Following the selection of whether the Course or Training Activity was Newly Developed or Enhanced in CDE-1, the Newly Developed or Enhanced course or Training Activity will be automatically populated when the save and validate button is selected.

- 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.
CDE-2 - Selecting Delivery Mode

Select Delivery Mode Used to Offer this Course or Training Activity: Following the selection of a training site in CDE-1, the delivery mode will be automatically populated when the save and validate button is selected.

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

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.*
CDE-2 - Selecting Primary Topic Area

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

Select Whether the Course or Training Activity was Offered in the Current Reporting Period: Following the selection of the Course or Training Activity Offered in the Current Reporting Period in CDE-1, the Course or Training Activity offered in the Current Reporting Period will be automatically populated when the save and validate button is selected.

- Offered
- Not Offered
- Re-offered

Note: Offering status 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.
Faculty Development, Instruction, and Recruitment—FD Subforms

**FD - Introduction**

1. Purpose: The FD-1 subforms collect information about the characteristics and trainees of faculty development programs.
2. Purpose: The FD-2 subforms collect information about the characteristics and trainees of faculty development activities.
3. Purpose: The FD-3 subforms collect information about the characteristics of faculty-student collaborative research projects.
FD-1a: Faculty Development - Structured Faculty Development Training Programs

FD-1a - Adding Structured Faculty Development Programs

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

![Program Name Table]

Figure 83. FD-1a - Adding Structured Faculty Development Programs

Program Name:

Enter the name of each new structured faculty development program coordinated and/or supported through the grant during the current reporting period. Select “Add Record”. Repeat this process as necessary to enter each new structured faculty development program that was coordinated and/or supported through the grant during the current reporting period.

⚠️ Warning: If a previously completed program (prior record) is being offered again with a new cohort, it will need to be re-created as a new record
FD-1a - Selecting Program Status

Select Program Status in the Current Reporting Period: Select the status of each faculty development program at the end of the annual reporting period by clicking on the drop-down menu under Block 1a and choosing one of the following options:

- Complete
- Ongoing

Note: Select 'Ongoing' if the training program did not conclude by June 30, 2019.

Note: Select 'Complete' if the training program concluded at some point during the annual reporting period (i.e. July 01, 2018 - June 30, 2019)
### FD-1a - Entering Program Information for Degree/Non-Degree Programs

<table>
<thead>
<tr>
<th>Select Whether this was a Degree Bearing Program</th>
<th>For Degree-bearing Programs</th>
<th>For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select Type of Degree Offered</td>
<td>Select Primary Focus Area</td>
</tr>
<tr>
<td>(2) Block 2</td>
<td>(3) Block 2a</td>
<td>(4) Block 2b</td>
</tr>
</tbody>
</table>

**Figure 85. FD-1a - Entering Program Information for Degree/Non-Degree Programs**

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

- Yes
- No

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

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

- AA
- Bachelor's Degree Not Otherwise Specified
- AS
- BPH
- BA
- BS
### Centers of Excellence

- Certificate
- DC
- DDS/MSPH
- DNP
- DO/DrPH
- DO/ScD
- MA
- MD/DrPH
- MD/PhD
- MHA
- MMS/MPH
- MPAS
- MPAS/MSPH
- MS
- MSN
- MSW
- PhD
- VMD

- BSN
- DDS
- Diploma
- DNSc
- DO/MPH
- DrPH
- Master's Degree Not Otherwise Specified
- MD/MPH
- MD/ScD
- MMS
- MMS/MSPH
- MPAS/DrPH
- MPAS/ScD
- MS-CTS
- MPH
- MPAS/MPH
- MPS/MPH
- MCR
- MSSW
- ScD
- BSW
- DDS/MPH
- DMD
- DO
- DO/MSPh
- DVM
- MD
- MD/MPH
- ME
- MMS/DrPH
- MMS/ScD
- MPAS/MPH
- MPH
- MSCR
- MSSW
- Post-Masters Certificate

### For Degree-bearing Programs: Select Primary Focus Area:

Select the primary focus area of the degree-bearing structured faculty development program by clicking on the drop-down menu in Column 4 (Block 2b) and choosing one of the options below. If you selected “No” in Column 2 (Block 2), select “N/A” in Column 4 (Block 2b).

- Dentistry - Dental Assistant
- Dentistry - Endodontic Dentistry
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Nursing - BS/BSN Completion
- Dentistry - Dental Hygiene
- Dentistry - General Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Adult gerontology
- Dentistry - Dental Hygiene/Public Health
- Dentistry - General Dentistry/Public Health
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Nursing - CNS - Family
Centers of Excellence

- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Pediatrics
- Nursing - Nurse Anesthetist
- Nursing - Nurse Researchers/Scientists
- Nursing - Pre-licensure
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Public Health - Social & Behavioral Sciences
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse Educator
- Nursing - Nursing Assistant
- Nursing - Public Health Nurse
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Maternal and Child Health
- N/A

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

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

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

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

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

Figure 86. FD-1a - Entering % of Time Spent Developing Competencies in Different Roles

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

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

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

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

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

Enter # of Faculty Who Completed the Program:

- If you marked a program as “Complete” in Column 1a, enter the number of faculty who completed each faculty development program during the current annual reporting period in the textbox in Column 10 (Block 6).
- If you selected “Ongoing” in Column 1a, enter a zero (“0”) in the textbox in Column 10 (Block 6).
Select whether any Faculty Received any type of BHW-Funded Financial Award during the Training Program: Select whether any faculty who participated in a training program received any type of BHW-funded financial award during the current reporting period by clicking on the drop-down menu in Column 11 (Block 7) and choosing from the following options:

- Yes
- No

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

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

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

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Profession and Discipline of Faculty Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(1)</td>
</tr>
<tr>
<td></td>
<td>(2) Block 4</td>
</tr>
</tbody>
</table>

Figure 89. FD-1b - Adding Profession and Discipline for Structured Programs

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

**Profession and Discipline of Faculty Trained:**

- Select the profession(s) and discipline(s) of all faculty members who participated in each structured faculty development program during the annual reporting period by choosing all that apply from the following options.
- Select “Add Record”
- Repeat this process to capture the profession and discipline of all faculty members who participated in each structured faculty development program during the current annual reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - General Dentistry
- Dentistry - Dental Hygiene
- Dentistry - Pathology Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Dental Assistant
- Dentistry - Orthodontic Dentistry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Behavioral Health - Psychology
- Dentistry - Oral Surgery Dentistry
- Dentistry - Other
Centers of Excellence

- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - General Preventive Medicine
- Nursing - NP - Family
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Aerospace Medicine
- Medicine - Medical Genetics
- Other - Occupational Therapy
- Other - Pharmacy
- Medicine - Obstetrics and Gynecology
- Medicine - Occupational Medicine
- Public Health - Health Policy & Management
- Medicine - Preventive Medicine/Internal Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery - Integrated
- Nursing - NP - Emergency care
- Medicine - Radiation Oncology
- Medicine - Radiology - Diagnostic
- Medicine - Surgery - General
- Medicine - Thoracic Surgery - Integrated
- Nursing - Researcher/Scientist
- Other - Chiropractor

- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Psychiatry
- Medicine - Allergy and Immunology
- Other - Office/Support Staff
- Medicine - Colon and Rectal Surgery
- Medicine - Dermatology
- Other - Unknown
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Nursing - CNL - Generalist
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Geropsychiatric

Annual Performance Report
Academic Year 2018-2019

- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Integrative Medicine
- Other - Community Health Worker
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Home Health Aide
- Medicine - Anesthesiology
- Other - Physical Therapy
- Other - Profession Not Listed
- Physician Assistant
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist
Centers of Excellence

- Other - First Responder/EMT
- Other - Medical Assistant
- Other - Optometry
- Other - Respiratory Therapy
- Nursing - NP - Pediatrics
- Nursing - Nurse midwife
- Other - Lay and Family Caregiver

- Nursing - NP - Women's health
- Nursing - Nurse anesthetist
- Medicine - Thoracic Surgery
- Medicine - Urology
- Nursing - Alternative/Complementary Nursing
- Other - Facility Administrator
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - NP - Acute care pediatric
- Other - Speech Therapy
- Nursing - NP - Psychiatric/Mental health
- Nursing - Other (e.g. CNA PCA)
- Other - Nutritionist

Annual Performance Report
Academic Year 2018-2019

- Medicine - Vascular Surgery - Integrated
- Other - Allied Health
- Nursing - CNS - Neonatal
- Other - Health Informatics/Health Information Technology
- Nursing - Community health nursing
- Other - Podiatry
- Nursing - NP - Neonatal
- Nursing - Nurse Assistant/Patient Care Associate (PCA)
- Nursing - Public health nurse
- Other - Veterinary Medicine
FD-1b - Entering # Trained in the Profession and Discipline

Figure 90. FD-1b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline:

- For each structured faculty development program, enter the number of faculty members in each profession/discipline who participated in the program during the current reporting period in the textbox in Column 3 (Block 4).
- Repeat this step as many times as necessary to capture the total number of faculty members by profession and discipline who participated in each structured program during the annual reporting period.

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

FD-2a - Entering Faculty Development Activities

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

<table>
<thead>
<tr>
<th>Activity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
</tr>
</tbody>
</table>

Figure 91. FD-2a - Entering Faculty Development Activities

Activity Name:

- Enter the name of each new unstructured faculty development program coordinated and/or supported through the grant during the current annual reporting period in Column 1 (Block 1)
- Select “Add Record”
- Repeat this process as necessary to enter each new structured faculty development program that was coordinated and/or supported through the grant during the current annual reporting period.

⚠️ Warning: If a previously completed program (prior record) is being offered again with a new cohort, it will need to be re-created as a new record
FD-2a - Selecting Type of Faculty Development Activity Offered

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

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

**Figure 92. FD-2a - Selecting Type of Faculty Development Activity Offered**

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

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

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

- For Academic Courses and Trainings/Workshops for Continuing Education (as selected in Column 2, Block 8): Select whether these activities are accredited for continuing education credit by clicking on the drop-down menu under Column 3 (Block 8a) and choosing one of the following options:
Centers of Excellence

- Yes
- No
- N/A

**For Courses or Workshops: Select Whether Attendance was to Acquire or Maintain Professional Certification:**

- For Academic Courses and Trainings/Workshops for Continuing Education (as selected in Column 2, Block 8): Select whether attendance by faculty was for the purposes of acquiring or maintaining a professional certification by clicking on the drop-down menu under Column 4 (Block 8b) and choosing one of the following options:
- For Clinical Rotations and Grand Rounds for Continuing Education, as well as Professional Conferences (as selected in Column 2, Block 8), Select N/A for Column 4 (Block 8b)

- Yes
- No
- N/A
FD-2a - Entering Duration of Training Activity

Enter Duration of Training Activity in Clock Hours

Enter the duration (in clock hours) of each faculty development activity in the textbox in Column 5 (Block 9).

Note: For activities less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60. Example: a 15-minute course would entered as 15/60 = .25.
Select Delivery Mode Used to Offer Training Activity: Select the primary delivery mode used to offer each faculty development activity by clicking on the drop-down menu in Column 6 (Block 10) and choosing one of the following options:

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

Select Delivery Mode Used to Offer Training Activity

Figure 94. FD-2a - Selecting Delivery Mode
FD-2a - Selecting Faculty Role(s)

Select the Faculty Role(s) Addressed at Training Activity

<table>
<thead>
<tr>
<th>Faculty Role(s) Addressed at Training Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7) Block 11</td>
</tr>
</tbody>
</table>

**Figure 95. FD-2a - Selecting Faculty Role(s)**

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

- Administrator
- Clinician
- Educator
- Researcher

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

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

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

Figure 96. FD-2b - Adding Profession and Discipline for Activities

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

**Profession and Discipline of Faculty Trained:**

- Select the profession(s) and discipline(s) of all faculty members who participated in each faculty development program during the current reporting period by choosing all that apply from the following options.
- Select “Add Record”.
- Repeat this process as necessary.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - General Dentistry
- Dentistry - Dental Hygiene
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Dental Assistant
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Behavioral Health - Psychology
- Dentistry - Oral Surgery Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
Health Resources and Services Administration
Bureau of Health Workforce

### Centers of Excellence

- Medicine - Emergency Medicine
- Medicine - General Preventive Medicine
- Nursing - NP - Family
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Aerospace Medicine
- Medicine - Medical Genetics
- Other - Occupational Therapy
- Other - Pharmacy
- Medicine - Obstetrics and Gynecology
- Medicine - Occupational Medicine
- Public Health - Health Policy & Management
- Medicine - Preventive Medicine/Internal Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery - Integrated
- Nursing - NP - Emergency care
- Medicine - Radiation Oncology
- Medicine - Radiology - Diagnostic
- Medicine - Surgery - General
- Medicine - Thoracic Surgery - Integrated
- Nursing - Researcher/Scientist
- Other - Chiropractor
- Other - First Responder/EMT
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Psychiatry
- Medicine - Allergy and Immunology
- Other - Office/Support Staff
- Medicine - Colon and Rectal Surgery
- Medicine - Dermatology
- Other - Unknown
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Nursing - CNL - Generalist
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Geropsychiatric
- Nursing - NP - Women's health

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- Dentistry - Radiology Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Integrative Medicine
- Other - Community Health Worker
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Home Health Aide
- Medicine - Anesthesiology
- Other - Physical Therapy
- Other - Profession Not Listed
- Physician Assistant
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Occupational Medicine
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Medicine - Plastic Surgery
- Medicine - Preventive Medicine/Aerospace Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist

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Health Resources and Services Administration
Bureau of Health Workforce

- Other - Medical Assistant
- Other - Optometry
- Other - Respiratory Therapy
- Nursing - NP - Pediatrics
- Nursing - Nurse midwife
- Other - Lay and Family Caregiver

Nursing - Nurse anesthetist
Medicine - Thoracic Surgery
Medicine - Urology
Nursing - Alternative/Complementary Nursing
Other - Facility Administrator
Nursing - CNS - Pediatrics
Nursing - CNS - Women’s health and pediatrics
Nursing - NP - Acute care pediatric
Other - Speech Therapy
Nursing - NP - Psychiatric/Mental health
Nursing - Other (e.g. CNA PCA)
Other - Nutritionist

Annual Performance Report
Academic Year 2018-2019

- Medicine - Vascular Surgery - Integrated
- Other - Allied Health
- Nursing - CNS - Neonatal
- Other - Health Informatics/Health Information Technology
- Nursing - Community health nursing
- Other - Podiatry
- Nursing - NP - Neonatal
- Nursing - Nurse Assistant/Patient Care Associate (PCA)
- Nursing - Public health nurse
- Other - Veterinary Medicine

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Figure 97. FD-2b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline:

- For each faculty development activity, enter the number of faculty members in each profession/discipline who participated in the program during the current reporting period in the textbox in Column 3 (Block 12).
- Repeat this step as many times as necessary to capture the total number of faculty members by profession and discipline who participated in each activity during the annual reporting period.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-3: Faculty Development - Faculty-Student Collaboration Projects
FD-3 - Adding Faculty-Student Collaboration Projects

⚠️ Warning: Multiple steps are required to complete this portion of the subform.

Figure 98. FD-3 - Adding Faculty-Student Collaboration Projects

Project Name:

Enter the name of each new faculty-student research project coordinated and/or supported through the grant during the current annual reporting period. Select “Add Record”. Repeat this process as necessary to enter each new faculty-student research project that was coordinated and/or supported through the grant during the current annual reporting period.
Select Project Status in the Current Reporting Period: Select the status of each faculty-student research project at the end of the annual reporting period by clicking on the drop-down menu in Column 1a and choosing one of the following options:

- Complete
- Ongoing

Warning: If no faculty-student research projects were supported through the grant during the annual reporting period, skip to the Final Steps for this subform.

Note: Select ongoing for a faculty-student research project that did not conclude by June 30, 2019.

Note: Select complete for a faculty-student research project that concluded at some point during the current annual reporting period (i.e. July 01, 2018 - June 30, 2019).
FD-3 - Entering Project Description

**Describe the Faculty-Student Project: All New Records (Ongoing and Complete):** Enter a **brief description** of each faculty-student research project in the textbox in Column 2 (Block 13).

![Figure 100. FD-3 - Entering Project Description](image)

**Note:** The maximum number of characters allowed is 1,000. It is recommended that grantees develop the description of each project in a word processor to ensure accurate spelling; and then cut and paste the finished description into the textbox.
Enter # of Faculty Members Involved in the Project: Total: In Column 4 (Block 14), enter the total number of faculty involved in each faculty-student research project.

Enter # of Faculty Members Involved in the Project: URM: In Column 5 (Block 14a), enter the total number of faculty involved in each specific project who are underrepresented minorities.

Enter # of Students Involved in the Project: Total: In Column 6 (Block 15), enter the total number of students involved in each faculty-student research project.

Enter # of Students Involved in the Project: URM: In Column 7 (Block 15a), enter the total number of students involved in each specific project who are underrepresented minorities.

Note: Column 5 is a subset of Column 4.
Note: Column 7 is a subset of Column 6.

Reference: Refer to the glossary for a definition of underrepresented minority.
Select whether any Faculty Received any type of BHW-Funded Financial Award: Select whether BHW-funded financial awards were provided to faculty who participated in each faculty-student research project during the annual reporting period by clicking on the drop-down menu in Column 8 (Block 16) and choosing one of the following options:

- Yes
- No

Warning: You must complete an IND-GEN subform for each faculty and/or student who received a BHW-funded financial award during the annual reporting period for participating in a faculty-student research project.
FD-3 - Selecting Type(s) of Vulnerable Population

Select Type(s) of Vulnerable Population Studied at this Site: Select the type(s) of vulnerable population studied in this project during the current reporting period by clicking on the drop-down menu in Column 9 and choosing all that apply from the following options:

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

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

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

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

![Screenshot of Printing Your Performance Report](image)

Figure 104. 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 105. Screenshot of the Submit Report Page
2. After step 1, you will be directed to the Submit Report-Confirm page. On this page, check the box under the ‘Certification’ section and click the ‘Confirm’ button on the bottom right corner of your screen to submit your report to HRSA. You will receive a confirmation message on your next screen.

![Submit Report - Confirm](image.png)

**Figure 106. 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](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](http://bhw.hrsa.gov/grants/reporting/index.html).

Are reports from prior years stored in the EHBs?
Yes. Grantees can locate reports from prior reporting periods in EHB by using any of the following methods:

a) Clicking the ‘view prior period data’ link within a form or under your Resources tab;
b) Going into your grant folder and searching for previously completed reports; or

c) Clicking on the "submissions" link in the left side navigation menu.

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

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

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

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

FAQs about the Training Program Setup forms

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

FAQs about the Program Characteristics (PC) forms

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

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

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

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

FAQs about the LR-1 through DV-3 forms

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

FAQs about the INDGEN form

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

I submitted a report last year using the 'not reported' option for trainee demographics. Why am I getting an error this year?
Health Resources and Services Administration
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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.

Centers of Excellence
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.