Instruction Manual for Grantees of the Dental Faculty Loan Repayment

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 Dental Faculty Loan Repayment grant program:
   - Plan, develop, and operate a dental faculty loan repayment program for faculty.
   - Individuals participating in the program must agree to serve as full-time faculty members.
   - Payment of principal and interest on the outstanding student loans of the individual faculty.

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

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

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

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

The Office of Management and Budget (OMB) has issued a 3-year approval for the annual collection of performance measures across all grants and cooperative agreements funded through the Health Resources and Services Administration's Bureau of Health Workforces (BHW) (OMB # 0915-0061; Expiration Date: 03/31/2022). The BPMH system has been significantly enhanced to incorporate all approved subforms, as well as increase system performance and functionality. Throughout the manual, there are several icons that identify tips and other important information that will assist you in completing each subform accurately (see below).

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

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

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

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

![Figure 1. Screenshot of View Prior Period Data Link](image)
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.
Warning: Check your browser settings before beginning your PRGCA. Incompatible browsers or incorrect settings will cause forms to display incorrectly.

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

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

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

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

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

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

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

The following table shows the order that subforms will appear throughout the BPMH system for your specific grant program. Please note that clicking on the "Save and Validate" button at the end of each subform will cause the system to check all Blocks for errors and route you to the next required subform on the list. If you need to go back to any subform for any reason, simply click on the Form ID on the left sidebar of the Electronic Handbook (EHB). Please note that changing data that has already been saved will require you to click on the "Save and Validate" button and go through the validation process once more.

<table>
<thead>
<tr>
<th>Order</th>
<th>Type of Form</th>
<th>Parent Form</th>
<th>Form ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Setup Form</td>
<td>SetupForms</td>
<td>Faculty Development</td>
</tr>
<tr>
<td>2</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>IND-GEN</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>INDGEN-PY</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-1a</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-1b</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2a</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2b</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-4a</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-4b</td>
</tr>
<tr>
<td>Order</td>
<td>Type of Form</td>
<td>Parent Form</td>
<td>Form ID</td>
</tr>
<tr>
<td>-------</td>
<td>---------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>10</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-5</td>
</tr>
</tbody>
</table>
Setup Forms
Setup Forms - Introduction
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 Instruction</td>
<td></td>
</tr>
<tr>
<td>Faculty Recruitment Activities</td>
<td></td>
</tr>
<tr>
<td>No faculty-related activities conducted</td>
<td></td>
</tr>
</tbody>
</table>

The Faculty Development Setup form will configure all subforms specific to faculty development. To complete the Faculty Development Setup form, select the type(s) of faculty development activities supported with grant funds during the annual reporting period under Block 1. Additionally, select "Faculty Instruction" if the dental faculty were responsible for offering instructional activities (e.g., teaching a course, seminar or workshop) during the annual reporting period. Options on this setup form are pre-selected based on your prior annual reporting. Please see the warning statement below regarding unchecking an option.

**Structured Faculty Development Training Program:**

**Faculty Development Activity:**

**Faculty Instruction:**

**Faculty Recruitment Activities:**
No faculty-related activities conducted:

⚠️ Warning: Options for the Faculty Setup form will be automatically selected if you have previously reported one or more training programs or activities through the FD-4 or FD-5 subforms. You may uncheck “Faculty Recruitment Activities” if you have nothing to report. You may not uncheck “Faculty Instruction” as you must update all teaching activities previously reported. Please refer to the Faculty Development—FD Subforms page (initial instructions page immediately following INDGEN forms) for instructions on how to update the status of each previously reported faculty instruction activity.

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

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

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

INDGEN - Introduction
Notice to Grantees about Individual-level Data:

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

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

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

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

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

IND-GEN - Setup

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

Yes (complete IND-GEN) No (click Save and Validate button to proceed to the next form)

Figure 4. IND-GEN - Setup

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

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

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

⚠️ Warning: Gray fields in prior records cannot be edited.
Warning: Prior records cannot be deleted.
Trainee Unique ID: To begin completing the INDGEN form, enter a seven (7) alphanumeric unique identifier for each individual in the textbox under Block 1.

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

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

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

- Faculty

Note: This Block will prepopulate for prior records with data submitted in previous reporting periods.
**IND-GEN - Selecting Individual's Enrollment/Employment Status**

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

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

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

- Female
- Male
- Not Reported

*Note: This Block will prepopulate for prior records with data submitted in previous reporting periods. 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: Select each individual’s year of birth at the end of the annual reporting period by clicking on the drop-down menu under Block 5.

- 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
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Note: In previous reporting periods, age was measured using a set of ranges. Moving forward, you will be required to enter each individual's age at the end of each annual reporting period.
**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: This Block will prepopulate for prior records with data submitted in previous reporting periods. 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.*
**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:

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

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

**Note:** This Block will prepopulate for prior records with data submitted in previous reporting periods. 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 Block 8 and choosing **one** of the following options:

- Yes
- No
- Not Reported

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

Figure 13. 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 Block 9 and choosing one of the following options:

- Yes
- No
- Not Reported

Note: This Block will prepopulate for prior records with data submitted in previous reporting periods. 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 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: This Block will prepopulate for prior records with data submitted in previous reporting periods. If "Not Reported" was selected for a record during a previous reporting period, you must provide the appropriate updated information in order to successfully submit your PRGCA.

Reference: Refer to the glossary for a definition of the various types of veteran statuses.
**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

**IND-GEN - Entering BHW-Funded Financial Award Information**

<table>
<thead>
<tr>
<th>Select Whether Individual Received BHW Financial Award?</th>
<th>Enter Individual's Financial Award Amount (BHW funds only)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Loan Repayment</td>
</tr>
<tr>
<td>12</td>
<td>(18)</td>
</tr>
<tr>
<td>Block 11</td>
<td>Block 11</td>
</tr>
</tbody>
</table>

**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 under Block 11 and choosing one of the following options:

- Yes
- No

**Enter Individual's Financial Award Amount (BHW funds only): Loan Repayment**: If the individual received a BHW-funded Loan Repayment or financial award, enter the total amount of BHW dollars provided during the annual reporting period in the textbox under Loan Repayment. Total amount reported should account for all BHW dollars including those applied to loan repayment, salary, fringe benefits, travel expenses, tuition, fees, books, and reasonable living expenses, as allowed by federal statutes and regulations.

If the individual did not receive a loan repayment or financial award, select "No" under Block 11 and enter "0" in all financial award columns where no money was disbursed.

**Note**: To view data submitted in previous reporting periods, click on the "View Prior Period Data" link on top of the form.
Enter # of Academic Years the Individual has Received BHW Funding

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

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

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

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

Note: To view data submitted in previous reporting periods, click on the "View Prior Period Data\" link on top of the form.
IND-GEN - Entering Balance of Individual's Loan

**Figure 17. IND-GEN - Entering Balance of Individual's Loan**

**Enter Balance of Individual's Loan:** Enter the individual’s loan balance at the beginning of the reporting period before any amount was paid off under Block 13. You may use up to two (2) decimal points to denote cents. Report this amount in US dollars.

*Note: To view data submitted in previous reporting periods, click on the "View Prior Period Data" link on top of the form.*
IND-GEN - Entering % of Loan Paid Off

**Enter % of Loan Paid Off**: Enter the percentage (%) of the loan paid off using BHW grant funds during the reporting period under Block 13a. Do not report other types of monies that may have been used to pay off this individual’s loan.

*Note: To view data submitted in previous reporting periods, click on the "View Prior Period Data" link on top of the form.*
IND-GEN - Selecting any HHS Priority Topic Area on which an Individual Received Training

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

**Figure 19. 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
IND-GEN - Selecting Individual's Primary Discipline

Select Individual's Primary Discipline: Select each individual's primary discipline by clicking on the drop-down menu under Block 16 and choosing one of the following options:

- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry

Warning: If the faculty member is teaching in a discipline area that is different than the one reported above (the area they trained in), please note in the comment field which discipline area the faculty member is teaching in during the reporting period.
IND-GEN - Selecting Whether Individual Left the Program Before Completion

Select Whether Individual Left the Program Before Completion: Select whether each individual permanently left their loan repayment program or faculty development program before completion during the annual reporting period by clicking on the drop-down menu under Block 21 and choosing one of the following options:

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

Select Whether Individual Graduated/Completed the Program

(37)
Block 22

Figure 22. IND-GEN - Entering Graduation/Completion Information

Select Whether Individual Graduated/Completed the Program: Select whether each individual completed their loan repayment program during the annual reporting period by clicking on the drop-down menu under Block 22 and choosing one of the following options:

- Yes
- No
IND-GEN - Entering Time Obligated to Serve in Dental Program

Enter Total Time Obligated to Serve (in weeks): To complete the IND-GEN form, enter the total number of weeks this individual is obligated to serve in the dental faculty loan repayment program under Block 28.

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

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

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

Grayed fields are provided here for identification purposes only.

<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 24. INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion

Select whether status/employment data are available for the individual 1-year post graduation/completion: Select whether current employment data are available for each faculty who received a BHW-funded financial loan repayment and completed their loan repayment program one year prior to this report by clicking on the drop-down menu under Block 23 and choosing one of the following options:

- Yes
- No

Select Individual's Current Training/Employment Status: If "Yes" was selected in Block 23, choose each former faculty’s current employment location by clicking on the drop-down menu under Block 23a choosing all that apply from the options listed below.
If "No" was selected in Block 23, choose "N/A" in Block 23a.

- Individual currently practices in a medically underserved area
- Individual currently practices in a rural area
- Individual currently practices in a primary care setting
### Individual Activity:
- Individual is currently providing treatment or wrap-around services to individuals with substance use disorders
- Individual is currently working in a facility that provides substance use treatment services
- None of the above

### Select Employment Location:
- Academic Institution
- Critical Access Hospital
- Other Clinical Training Site
- Rural Health Clinic
- N/A
- Area Health Education Center
- FQHC or Look-Alike
- Private Dental Practice
- None of the Above

### Select Whether Your Organization Hired this Individual:
- No
- Yes
- N/A

### Select Whether a Partner Organization Hired this Individual:
- Yes
- No
- N/A

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Note: Repeat these steps for all rows in the INDGEN-PY table and enter selections for all blank fields under Blocks 23 and 23a.

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

For instructional activities reported previously:

- The BPMH system will prepopulate certain fields in the FD-4a subform.
- You must select whether each instructional activity reported previously was offered during the current annual reporting period.
- If an instructional activity reported previously was also offered during the current annual reporting period, all other Blocks in the FD-4a subform must be completed.
- If an instructional activity reported previously was not offered during the current annual reporting period, complete only Block 1a in the FD-4a subform.
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.

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

**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 coordinate and/or supported through the grant during the current reporting period.

**Warning:** Complete the FD-1a Setup form only if grant funds were used to support structured faculty development programs other than those previously reported and still ongoing. To provide updates for these programs, go to the next page. Once a program has been completed, it will need to be re-entered as a new record if the program is run again with a new cohort.
FD-1a - Selecting Program Status

Select Program Status in the Current Reporting Period: For all records, select the status of each structured 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 current reporting period (i.e. July 01, 2018 - June 30, 2019).
FD-1a - Entering Program Information for Degree/Non-Degree Programs

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

<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>
<tr>
<td>(5) Block 3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 27. FD-1a - Entering Program Information for Degree/Non-Degree Programs**

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

- Yes
- No

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

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

- Certificate
- Post-Masters Certificate
For Degree-bearing Programs: Select Primary Focus Area:

- **If you selected "No" in Column 2 (Block 2),** select "N/A" in Column 4 (Block 2b).
- **If you selected "Yes" in Column 2 (Block 2),** 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.

  - Dentistry - Public Health Dentistry
  - Education and Clinical Research
  - Leadership
  - Other Focus Area
  - Education
  - Health Administration
  - Teaching
  - N/A

For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours: If "Yes" was selected for Block 2, enter "0" in Block 3.
If "No" was selected in Block 2, enter the length of each program in clock hours in the textbox under 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.

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

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 the 'Clinician' role (Column #6).
- **Administrator:** Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Administrator' role (Column #7).
- **Educator:** Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Educator' role (Column #8).
- **Researcher:** Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Researcher' role (Column #9).

*Note: Percentages of time spent across the four roles must sum up to 100%.*
Note: These Blocks will prepopulate for prior records with data submitted in previous reporting periods.
FD-1a - Entering # of Faculty Who Completed the Program

Enter # of Faculty Who Completed the Program

(10)
Block 6

Figure 29. FD-1a - Entering # of Faculty Who Completed the Program

Enter # of Faculty Who Completed the Program: For structured training programs marked as "Complete" in Block 1a, enter the number of faculty, fellows, and community providers who completed each program during the annual reporting period in the textbox under Block 6.
FD-1a - Selecting whether Faculty Received BHW-Funded Financial Award

Select whether any Faculty Received any type of BHW-Funded Financial Award during the Training Program:

Select whether any faculty who participated in a structured faculty development program received any type of BHW-funded financial award during the current reporting period by clicking on the drop-down menu and choosing one of the following options:

- Yes
- No

Warning: You must complete an INDGEN subform for each individual 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>

**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)/discipline(s) of all faculty members who participated in each structured faculty development program during the current reporting period by choosing all that apply from the options below. Next, select “Add Record.” Repeat this process to capture the profession/discipline of all faculty members who participated in each structured faculty development program during the current reporting period.

- Behavioral Health - Counseling Psychology
- Dentistry - Dental Therapy
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Family Medicine
- Medicine - Other
- Behavioral Health - Other Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Geriatrics
- Medicine - Pediatrics
- Nursing - Other
- Other - Profession Not Listed
- Behavioral Health-Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Internal Medicine
- Medicine - Preventive Medicine
- Other - Pharmacy
- Other - Unknown
Dental Faculty Loan Repayment

- Medicine - Psychiatry
- Other - Physical Therapy
- Physician Assistant
- Public Health - Health Policy & Management
- Public Health - Other

Note: Information regarding the names of faculty development programs will prepopulate with the information that was entered and saved in the FD-1a subform.
FD-1b - Entering # Trained in the Profession and Discipline

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

![Table](image)

**Figure 32. 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 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 by profession/discipline who participated in each structured faculty development program during the current reporting period.

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

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

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

Activity Name:

- To begin completing the FD-2a subform, enter the name of each faculty development activity coordinated and/or supported through the grant during the annual reporting period.
- Click on the "Add Record" button to save your entry. **Repeat this process to enter each faculty development activity coordinated and/or supported through the grant during the annual reporting period.**
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></td>
<td>Select Whether Attendance was to Acquire or Maintain Professional Certification</td>
</tr>
<tr>
<td>(2) Block 8</td>
<td>(3) Block 8a</td>
</tr>
<tr>
<td></td>
<td>(4) Block 8b</td>
</tr>
</tbody>
</table>

**Figure 34. FD-2a - Selecting Type of Faculty Development Activity Offered**

**Select Type of Faculty Development Activity Offered:** To begin completing the FD-2a subform, select the type of faculty development activity supported and/or coordinated through the grant during the reporting period by clicking on the drop-down menu under 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 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 3 (Block 8a).
• **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:

  • Yes
  • No
  • N/A

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

• **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).

• **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:

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

Enter Duration of Training Activity in Clock Hours: Enter the total length of each faculty development activity in clock hours in the textbox under Block 9.

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

Select Delivery Mode Used to Offer Training Activity: Select the primary delivery mode used to offer each faculty development activity by clicking on the drop-down menu under 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

Figure 36. FD-2a - Selecting Delivery Mode
FD-2a - Selecting Faculty Role(s)

Select the Faculty Role(s) Addressed at Training Activity: To complete the FD-2a subform, select the faculty role(s) addressed in each activity by clicking on the drop-down menu under 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)</td>
</tr>
</tbody>
</table>

Figure 38. 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)/discipline(s) of all faculty who participated in each faculty development activity during the current reporting period by choosing all that apply from the options below. Next, select “Add Record.” Repeat this process to capture the profession/discipline of all faculty who participated in each faculty development activity during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Geriatrics
- Medicine - Pediatrics
- Nursing - Other
- Other - Physical Therapy
- Behavioral Health - Counseling Psychology
- Dentistry - Dental Therapy
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Internal Medicine
- Medicine - Preventive Medicine
- Other - Office/Support Staff
Health Resources and Services Administration
Bureau of Health Workforce

- Medicine - Family Medicine
- Medicine - Other
- Medicine - Psychiatry
- Other - Pharmacy
- Other - Registered Dietician
- Public Health - Health Administration
- Public Health - Other

- Other - Unknown
- Public Health - Health Policy & Management

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- Other - Profession Not Listed
- Physician Assistant
- Public Health - Nutrition
FD-2b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline

(3)
Block 12

Figure 39. FD-2b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline: Enter the number of faculty in each profession/discipline who participated in the faculty development activity during the current reporting period in the textbox. Repeat this step as many times as necessary to capture the total number of faculty by profession/discipline who participated in each faculty development activity during the current reporting period.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-4a: Faculty Development - Faculty Instruction
FD-4a - Adding Faculty Instructional Activities

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

Name of the Course or Workshop Offered by the Faculty:

- **For new records,** enter the name of an instructional activity offered by faculty who received BHW-funded financial awards or loan repayments during the annual reporting period in the textbox next to "Enter the Name of the Course or Workshop Offered by the Faculty".
- Next, click on the "Add Record" button to save your entry. **Repeat this process to capture all instructional activities offered by faculty who received a BHW-funded loan repayment or financial award during the annual reporting period.**
- **For prior records,** go to the next page to update their status.

Warning: Complete the Setup for new instructional activities offered by faculty who received Dental Faculty Loan Repayment financial awards.
FD-4a - Selecting Whether the Course was Offered in the Current Period

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

- Yes
- No

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

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

Select the Content Area Of the Course or Workshop: Select the content area of each instructional activity offered by faculty during the annual reporting period by clicking on the drop-down menu under Block 18 and choosing one of the following options:

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

- Sexual health
- Social marketing
- Suicide
- Teledentistry
- Tertiary care
- Transitional care
- Urban health
- Veterans Health
- Women's health
- Workforce development

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

Note: This Block will prepopulate for prior records with data submitted in previous reporting periods.
FD-4a - Entering Course/Workshop Length

<table>
<thead>
<tr>
<th>Enter the Length of the Course or Workshop in Clock Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3) Block 19</td>
</tr>
</tbody>
</table>

Figure 43. FD-4a - Entering Course/Workshop Length

**Enter the Length of the Course or Workshop in Clock Hours:** Enter the duration, in clock hours, of each instructional activity offered by faculty during the annual reporting period in the textbox under Block 19.

- **Note:** For courses less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60. Example: a 15-minute course would entered as 15/60 = .25.
- **Note:** This Block will prepopulate for prior records with data submitted in previous reporting periods.
FD-4a - Entering # of Times the Course or Workshop was Offered

<table>
<thead>
<tr>
<th>Enter # of Times the Course or Workshop was Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4) Block 20</td>
</tr>
</tbody>
</table>

Figure 44. FD-4a - Entering # of Times the Course or Workshop was Offered

**Enter # of Times the Course or Workshop was Offered:** Enter the number of times each instructional activity was offered by faculty during the annual reporting period in the textbox under Block 20.
FD-4a - Selecting Delivery Mode

Select the Delivery Mode Used to Offer the Course or Workshop:

To complete the FD-4a subform, select the delivery mode used by faculty to offer each instructional activity offered during the annual reporting period by clicking on the drop-down menu under Block 22 and choosing one of the following options:

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

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

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

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

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

**Figure 46. FD-4b - Adding Profession and Discipline for Faculty Instructional Activities**

**Name of the Course or Workshop Offered by the Faculty:** To add information about the profession and discipline of individuals trained through each instructional activity offered by faculty during the annual reporting period, select an instructional activity by clicking on the drop-down menu next to "Name of the Course of Workshop Offered by the Faculty" and choosing one of the available options.

**Profession and Discipline of Individuals Trained:** Next, select profession(s) and discipline(s) of all individuals trained in each instructional activity offered by faculty during the annual 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 as necessary to identify the profession and discipline of all individuals trained in each instructional activity offered by faculty during the annual reporting period.**

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Hygiene
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Allergy and Immunology
- Medicine - Dermatology
- Medicine - Geriatric Psychiatry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Medicine - Anesthesiology
- Medicine - Emergency Medicine
<table>
<thead>
<tr>
<th>Medical Specialties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicine - Aerospace Medicine</td>
</tr>
<tr>
<td>Medicine - Colon and Rectal Surgery</td>
</tr>
<tr>
<td>Medicine - Family Medicine</td>
</tr>
<tr>
<td>Medicine - Integrative Medicine</td>
</tr>
<tr>
<td>Medicine - Internal Medicine/Pediatrics</td>
</tr>
<tr>
<td>Medicine - Neurology</td>
</tr>
<tr>
<td>Medicine - Occupational Medicine</td>
</tr>
<tr>
<td>Medicine - Other</td>
</tr>
<tr>
<td>Medicine - Pediatrics</td>
</tr>
<tr>
<td>Medicine - Plastic Surgery - Integrated</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/ Internal Medicine</td>
</tr>
<tr>
<td>Medicine - Aerospace Medicine</td>
</tr>
<tr>
<td>Medicine - Internal Medicine</td>
</tr>
<tr>
<td>Medicine - Medical Genetics</td>
</tr>
<tr>
<td>Medicine - Nuclear Medicine</td>
</tr>
<tr>
<td>Medicine - Ophthalmology</td>
</tr>
<tr>
<td>Medicine - Otolaryngology</td>
</tr>
<tr>
<td>Medicine - Orthopaedic Surgery</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/Public Health</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine / Preventive Medicine</td>
</tr>
<tr>
<td>Medicine - Thoracic Surgery - Integrated</td>
</tr>
<tr>
<td>Medicine - Thoracic Surgery</td>
</tr>
<tr>
<td>Medicine - Vascular Surgery - Integrated</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/ Internal Medicine</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/ Public Health</td>
</tr>
<tr>
<td>Medicine - Preventive Medicine/Family Medicine</td>
</tr>
<tr>
<td>Medicine - Psychiatry</td>
</tr>
<tr>
<td>Medicine - Surgery - General</td>
</tr>
<tr>
<td>Medicine - Urology</td>
</tr>
<tr>
<td>Nursing - CNS - Adult gerontology</td>
</tr>
<tr>
<td>Nursing - CNS - Neonatal</td>
</tr>
<tr>
<td>Nursing - CNS - Women's health</td>
</tr>
<tr>
<td>Nursing - Midwife</td>
</tr>
<tr>
<td>Nursing - NP - Adult</td>
</tr>
<tr>
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• Other - Audiology
• Other - Direct Service Worker
• Other - Health Education Specialist
• Other - Medical Assistant
• Other - Office/Support Staff
• Other - Podiatry
• Other - Registered Dietician
• Other - Unknown
• Other - Physical Therapy
• Public Health - Biostatistics
• Public Health - Epidemiology
• Public Health - Injury Control & Prevention
• Public Health - Social & Behavioral Sciences
• Student - CNS - Family
• Student - CNS - Pediatrics
• Student - Dental Assistant
• Student - Diploma/Certificate
• Student - Graduate - Other
• Student - Graduate - Public Health
• Student - Law School
• Student - Midwife
• Student - NP - Adult gerontology
• Student - NP - Geropsychiatric
• Student - NP - Pediatrics
• Student - Nurse Midwife
• Student - Registered nurse (RN)

• Other - Veterinary Medicine
• Other - Speech Therapy
• Public Health - Disease Prevention & Health Promotion
• Public Health - Health Policy & Management
• Public Health - Nutrition
• Student - Alternative/Complementary Nursing
• Student - CNS - Geropsychiatric
• Student - CNS - Psychiatric/Mental health
• Student - Dental Hygiene
• Student - Graduate - Nursing Doctorate
• Student - Graduate - Other Behavioral Health
• Student - Graduate - Social Work
• Student - Licensed Practical/Vocational Nurse (LPN/LVN)
• Student - NP - Acute care adult gerontology
• Student - NP - Emergency care
• Student - NP - Neonatal
• Student - NP - Psychiatric/Mental health
• Student - Physician Assistant
• Student - Undergraduate - Other

• Public Health - Environmental Health
• Public Health - Infectious Disease Control
• Public Health - Other
• Student - CNS - Adult gerontology
• Student - CNS - Neonatal
• Student - CNS - Women's health
• Student - Dental School
• Student - Graduate - Nursing Masters
• Student - Graduate - Psychology
• Student - Home Health Aide
• Student - Medical School
• Student - NP - Acute care pediatric
• Student - NP - Family
• Student - NP - Other advanced nurse specialists
• Student - NP - Women's health
• Student - Post - high school / Pre - college
• Student - Undergraduate - Public Health
FD-4b - Entering # Trained in the Profession and Discipline

**Figure 47. FD-4b - Entering # Trained in the Profession and Discipline**

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

(3)
Block 21

**Enter # Trained in this Profession and Discipline:** To complete the FD-4b subform, enter the number of individuals trained in each profession and discipline that appears under the column labeled "Profession and Discipline of Individuals Trained".

💡 **To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next subform or click on the "Submit" button in the left hand side of the EHB to begin the submission process of your PRGCA.
FD-5: Faculty Development - Faculty Recruitment
FD-5 - Adding Faculty Recruitment Activities

⚠️ Warning: The FD-5 subform will only appear if "Faculty Recruitment Activities" was selected in the Faculty Development Setup form.

⚠️ Warning: Completing this subform requires three (3) steps. Please read instructions carefully.

<table>
<thead>
<tr>
<th>*Faculty Recruitment Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Faculty Recruited through the Program (Block 23a)</td>
</tr>
<tr>
<td>Enter # of URM Faculty Recruited through the Program (Block 23b)</td>
</tr>
<tr>
<td>Enter # of Faculty Positions Retained (Block 23c)</td>
</tr>
</tbody>
</table>

**Figure 48. FD-5 - Adding Faculty Recruitment Activities**

To complete the Faculty Recruitment Activities subform, click on the textbox next to each Block and enter the number requested using these instructions:

**Enter # of Faculty Recruited through the Program**: Enter the total number of faculty recruited to the loan repayment program during the annual reporting period through your faculty recruitment program sponsored by the grant in Block 23a.

**Enter # of URM Faculty Recruited through the Program**: Of the number reported in Block 23a, enter the number of underrepresented minority faculty recruited during the annual reporting period in Block 23b (this number is a subset of Block 23a). See glossary for a definition of URM.

**Enter # of Faculty Positions Retained**: Since the beginning of your grant, enter the number of faculty positions recruited and retained as a result of this grant.

⚠️ Warning: If there is no data for a specific Block, enter "0".
Note: To view data submitted in previous reporting periods, click on the "View Prior Period Data" link on top of the form.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, click on the “Submit” button in the left hand side of the EHB to begin the submission process of your PRGCA. You have not submitted your PRGCA until you receive a message indicating that your report has been successfully submitted, and you receive a tracking number. You must validate your report, and then the report must be certified by the submitting official at your institution before it is submitted to HRSA. Please ensure that this process is completed in a timely manner. See instructions on the following pages.
Printing Your Performance Report

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

Figure 49. Screenshot of Printing Your Performance Report
Submitting Your Performance Report

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

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

Figure 51. Screenshot of the Submit Report - Confirm Page
Appendix A: Glossary

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

General FAQs

When is the due date for the performance report?
Performance reports are due by July 31, 2019 for all programs. No extensions will be granted beyond this date. Failure to submit a performance report by the due date may place your grant in a non-compliant status.

What dates does the performance report cover?
The performance report submitted by grantees should cover all activities conducted through the grant during the current reporting period July 01, 2018 - June 30, 2019.

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

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

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

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

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

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

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

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

FAQs about the Training Program Setup forms

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

FAQs about the Program Characteristics (PC) forms

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

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

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

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

FAQs about the LR-1 through DV-3 forms

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

**FAQs about the INDGEN form**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**FAQs about the INDGEN-PY form**

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

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

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

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

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

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

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

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

**Why do I need to enter the zip code of my training sites?**
The zip codes allow HRSA to identify sites that are in rural areas, medically underserved communities, and health professions shortage areas. Because the designation of each location may change over time, the zip code allows HRSA to adjust the way it labels a site.
Where can I find the 4-digit zip code extension?
You can locate your site's 4-digit zip code extension by visiting the US Postal Service website: https://tools.usps.com/go/ZipLookupAction_input

FAQs about the Curriculum Development and Enhancement (CDE) forms

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

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

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

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

FAQs about the Faculty Development (FD) forms

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

FAQs about the Continuing Education (CE) forms

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

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

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