Instruction Manual for Grantees of the NEPQR-Veterans Bachelor of Science Nursing (VBSN)

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 NEPQR-VBSN grant program:
   - To increase veteran’s enrollment in and completion of baccalaureate nursing programs through career ladder projects.

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).

![Warning Icon] Marks a warning statement. Please read information in **bold** carefully in order to complete each subform accurately.

![Tip Icon] Marks a tip or important note for completing a specific column or subform in the BPMH system.

![End Form Icon] 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.

![Screenshot of View Prior Period Data Link]

Figure 1. Screenshot of View Prior Period Data Link

NEPQR-Veterans Bachelor of Science Nursing (VBSN)
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.**
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>Training Program</td>
</tr>
<tr>
<td>2</td>
<td>Setup Form</td>
<td>SetupForms</td>
<td>Faculty Development</td>
</tr>
<tr>
<td>3</td>
<td>Performance Data Form</td>
<td>ProgramCharacteristics-PCSubforms</td>
<td>PC-1</td>
</tr>
<tr>
<td>4</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>IND-GEN</td>
</tr>
<tr>
<td>5</td>
<td>Performance Data Form</td>
<td>IndividualCharacteristics-INDGENSubforms</td>
<td>INDGEN-PY</td>
</tr>
<tr>
<td>6</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-1</td>
</tr>
<tr>
<td>7</td>
<td>Performance Data Form</td>
<td>ExperientialCharacteristics-EXPSubforms</td>
<td>EXP-2</td>
</tr>
<tr>
<td>8</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESSubforms</td>
<td>CDE-1</td>
</tr>
<tr>
<td>9</td>
<td>Performance Data Form</td>
<td>CourseDevelopmentandEnhancement-CDESSubforms</td>
<td>CDE-2</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-1a</td>
</tr>
<tr>
<td>11</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-1b</td>
</tr>
<tr>
<td>12</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2a</td>
</tr>
<tr>
<td>13</td>
<td>Performance Data Form</td>
<td>FacultyDevelopmentInstructionandRecruitment-FDSubforms</td>
<td>FD-2b</td>
</tr>
</tbody>
</table>
Setup Forms
Setup Forms - Introduction
Training Program - Setup
Training Program Setup - Selecting Type of Training Program

⚠️ Warning: A new entry in the Training Program Setup form is needed for all training programs supported through the grant during the annual reporting period.

*Add Training Program

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

Add Record

| Load Program Details |

Figure 3. Training Program Setup - Selecting Type of Training Program

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

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

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

![Training Program Setup - Loading Program Details](image)

**Figure 4. Training Program Setup - Loading Program Details**

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

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

For degree-bearing programs, use the following instructions:

For a Degree/Diploma/Certificate Program, Select Type of Degree Offered: To complete your entry, select the type of degree program supported through the grant during the annual reporting period by clicking on the drop-down menu next to “For a Degree/Diploma/Certificate Training Program, Select Type of Degree Offered" and choosing one of the following options:
- BSN

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

Select Delivery Mode Used to Offer Program: Next, select the primary mode used to deliver each degree program during the annual reporting period by clicking on the drop-down menu under and choosing one of the options listed below.
Next, click on the "Add Record" button to save your entry. Repeat this process to capture the degree programs of all students who received a BHW-funded financial award during annual reporting period.
- Campus-based program
- Distance learning program
Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
**Training Program Setup - Selecting Training Activity Status**

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

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

**Select Training Activity Status in the Current Reporting Period**: Select the Training Activity Status of all reported training programs. If you are reporting on a program, please choose ‘Active.’

- Active
- Inactive

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

To Complete the Form: Click on "Save and Validate" on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Faculty Development – Setup

Selecting Faculty Development Activities

<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>No faculty-related activities conducted</td>
<td></td>
</tr>
</tbody>
</table>

Figure 7. Selecting Faculty Development Activities

The Faculty Development Setup form will configure all subforms specific to faculty development activities. To complete the Faculty Development Setup form, select the type(s) of faculty development activities coordinated or supported through the grant during the annual reporting period by choosing **all that apply** under Block 1.

**Structured Faculty Development Training Program:**

**Faculty Development Activity:**

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-1a or FD-2a subforms. You may uncheck “Faculty Development Activity” if you have nothing to report. You may uncheck “Structured Faculty Development Training Program” only if you have no training programs still in progress. Please refer to the Faculty Development—FD Subforms page (initial instructions page immediately following CDE forms) for instructions on how to update the status of each previously reported structured faculty development program.

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

**Reference:** Refer to the glossary for a definition of 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-1: Program Characteristics – Degree/Diploma/Certificate Training Programs
PC-1 - Selecting Type(s) of Partners/Consortia

Warning: For degree programs previously reported, Block 1.k.1 will appear as read-only and is not editable. If the delivery mode for a degree program previously reported has changed, this requires a new entry in the Training Program Setup form.

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

Figure 8. PC-1 - Selecting Type(s) of Partners/Consortia

Select Type(s) of Partners/Consortia Used to Offer this Training: To complete the PC-1 subform for all records, select the type(s) of partnerships or consortia used or established for the purpose of offering each degree program during the annual reporting period by clicking on the drop-down menu under Block 2 and choosing all that apply from the following options:

- Academic department - outside the institution
- Alzheimer’s Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Day and home care programs (i.e. Home Health)
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric ambulatory care and comprehensive units
- Health department - Local
- Academic department - within the institution
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - ACL
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government -Other
- Geriatric Behavioral or Mental Health Units
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Extended care facilities
- Federal Government - AHRQ
- Federal Government - IHS
- Federal Government - Other HRSA Program
- FQHC or look-alike
- Geriatric consultation services
- Health department - Tribal
- Health policy center
- Local Government
Health Resources and Services Administration
Bureau of Health Workforce

- Health disparities research center
- Hospice
- Long-term care facility
- Nonprofit organization (non-faith based)
- Other
- Professional Associations
- State Government

- No partners/consortia used
- Nurse Managed Health Clinics
- Physical therapy/Rehabilitation center
- Quality improvement organization
- Tribal Government

Warning: You may not select "No partners/consortia used" in combination with any other option.
PC-1 - Entering Enrollment Information

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

Blocks 3, 3a and 3b on the PC-1 subform apply to all records and capture enrollment information about the total number of students who were enrolled in each degree program (regardless of funding source) during the annual reporting period.

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

Figure 9. PC-1 - Entering Enrollment Information

Enter Total # Enrolled (whether funded by BHW or not): Total: For Block 3, enter the total number of students who were enrolled in each degree program during the annual reporting period. Count all students enrolled—regardless of whether they received a BHW-funded financial award or not. This number is a total enrollment headcount minus those students who permanently dropped out.

Enter Total # Enrolled (whether funded by BHW or not): URM: For Block 3a, enter the number of students enrolled in each degree program during the annual reporting period who were underrepresented minorities. Block 3a is a subset of Block 3.

Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM: For Block 3b, enter the number of students enrolled in each degree program during the annual reporting period who are from disadvantaged backgrounds and are not underrepresented minorities. Block 3b is a subset of Block 3.
Note: Do not count students who permanently left the degree program before completion (i.e. attrition). These students will be captured separately in Block 9.

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

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

Example: The School of Nursing had a total of 202 students enrolled in the BSN program. The school used BHW funds to provide funding to 25 students in the program during the annual reporting period. During this period, 2 students permanently left the BSN degree program before completion.
In Block 3 of this form, the School of Nursing would enter 200.

Example: The School of Nursing had a total of 200 students maintain enrollment in the BSN program during the annual reporting period. Among the 200 students enrolled in this degree program, 35 are underrepresented minorities.
In Block 3a, the School of Nursing would enter 35.

Example: The School of Nursing had a total of 200 students maintain enrollment in the BSN program during the annual reporting period. Among the 200 students enrolled in this degree program, a total of 45 students are from disadvantaged backgrounds. Twenty (20) out of the 45 students from a disadvantaged background are also underrepresented minorities.
In Block 3b, the School of Nursing would enter 25.
PC-1 - Entering Graduate Information

Blocks 8 and 8a on the PC-1 subform apply to all records and capture graduates information about the total number of students in each degree program (regardless of funding source) during the annual reporting period.

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

Figure 10. PC-1 - Entering Graduate Information

**Enter Total # Graduated/Completed (whether funded by BHW or not): Total:** For Block 8, enter the total number of students in each degree program who graduated during the annual reporting period. **Block 8 is a subset of Block 3.**

**Enter Total # Graduated/Completed (whether funded by BHW or not): URM:** For Block 8a, enter the number students in each degree program who graduated during the annual reporting period and are underrepresented minorities. **Block 8a is a subset of Block 8.**

*Example:* The School of Nursing had a total of 200 students maintain enrollment in the BSN program during the annual reporting period. Among the 200 students enrolled in this degree program, a total of 50 students completed all degree requirements and graduated during this reporting period. **In Block 8, the School of Nursing would enter 50.**

*Example:* The School of Nursing had a total of 200 students maintain enrollment in the BSN program during the annual reporting period. Among the 200 students enrolled in this degree program, a total of 50 completed all degree requirements and graduated during this period. Ten (10) out of the
50 students who graduated are underrepresented minorities.

*In Block 8a, the School of Nursing would enter 10.*
PC-1 - Entering Attrition Information

Blocks 9 and 9a on the PC-1 subform apply to all records and capture attrition information in each degree program (regardless of funding source) during the annual reporting period.

<table>
<thead>
<tr>
<th>Enter Total # Who left the Program Before Completion (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>(12)</td>
</tr>
<tr>
<td>Block 9</td>
</tr>
</tbody>
</table>

Figure 11. PC-1 - Entering Attrition Information

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total: For Block 9, enter the total number of students who permanently left each degree program before completion during the annual reporting period.

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM: For Block 9a, enter the number of students who permanently left each degree program before completion during the annual reporting period and are underrepresented minorities. **Block 9a is a subset of Block 9.**

Example: The School of Nursing had a total of 202 students enrolled in the BSN program. The school used BHW funds to provide funding to 25 students in the program during the annual reporting period. During this period, 2 students permanently left the BSN degree program before completion. **In Block 9 of this form, the School of Nursing would enter 2.**
Example: The School of Nursing had a total of 202 students enrolled in the BSN program. The school used BHW funds to provide funding to 25 students in the program during the annual reporting period. During this period, 2 students permanently left the BSN degree program before completion and none who left were underrepresented minorities.

In Block 9a of this form, the School of Nursing would enter 0.

![Figure 12. Completed PC-1 sub form](image)

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

To begin providing individual-level data for students and faculty enrolled in the degree or faculty development program during the annual reporting period, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel form that will allow you to begin data entry.

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 13. 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: STUDENTS DO NOT RECEIVE DIRECT FINANCIAL SUPPORT IN THE VBSN PROGRAM. DATA COLLECTED ON INDGEN FORM IS TO CAPTURE DEMOGRAPHIC DATA AS WELL AS FOLLOW-UP

⚠️ 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**: To begin completing the IND-GEN subform, select the training program associated with each individual by clicking on the drop-down menu under the column labeled "Type of Training Program" and choosing one of the available options.

*Note: The options available under "Type of Training Program" will prepopulate with information entered and saved in the Training Program Setup Form. 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 BHW financial assistance during the annual reporting period.*

*Note: This Block will prepopulate for prior records with data submitted in the previous reporting period.*

**Example**: The School of Nursing saved one (1) entry in the Training Program Setup form to reflect the type of degree program supported by the grant. Under "Type of Training Program" the School of Nursing would see the following options:

- Degree/Diploma program | BSN
- Other
IND-GEN - Entering Trainee Unique ID

Trainee Unique ID: Enter a seven (7) alphanumeric unique identifier for each student 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 student.

💡 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 during the annual reporting period by clicking on the drop-down menu under Block 2 and choosing one of the following options:

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

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

Select Individual's Enrollment / Employment Status: Select each individual's current enrollment (for VBSN students) or employment (faculty) status during the annual reporting period 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
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

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

**Enter Year of Birth:** Select each individual's year of birth in the dropdown menu under Block 5.

- 1917
- 1918
- 1919
- 1920
- 1921
- 1922
- 1923
- 1924
- 1925
- 1926
- 1927
- 1928
- 1929
- 1930
- 1931
- 1932
- 1933
- 1934
- 1935
- 1936
- 1937
- 1938
- 1939
- 1940
- 1941
- 1942
- 1943
- 1944
- 1945
- 1946
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- 1962
- 1963
- 1964
- 1965
- 1966
- 1967
- 1968
- 1969
- 1970
- 1971
- 1972
- 1973
- 1974
- 1975
- 1976
- 1977
- 1978
- 1979
- 1980
- 1981
- 1982

**Figure 19. IND-GEN - Entering Year of Birth**
<table>
<thead>
<tr>
<th>Year</th>
<th>Year</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>1984</td>
<td>1985</td>
</tr>
<tr>
<td>1986</td>
<td>1987</td>
<td>1988</td>
</tr>
<tr>
<td>1992</td>
<td>1993</td>
<td>1994</td>
</tr>
<tr>
<td>1998</td>
<td>1999</td>
<td>2000</td>
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<tr>
<td>2001</td>
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<td>2003</td>
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<td>2004</td>
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<tr>
<td>2007</td>
<td>2008</td>
<td>2009</td>
</tr>
<tr>
<td>2010</td>
<td>2011</td>
<td>2012</td>
</tr>
<tr>
<td>2013</td>
<td>2014</td>
<td>2015</td>
</tr>
<tr>
<td>2016</td>
<td>2017</td>
<td>Not Reported</td>
</tr>
</tbody>
</table>
IND-GEN - Selecting Individual's Ethnicity

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

- Hispanic/Latino
- Non-Hispanic/Non-Latino

**Note:** This Block will prepopulate for prior records with data submitted in the previous reporting period. 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:

- American Indian or Alaska Native
- Asian
- Black or African-American
- Native Hawaiian or Other Pacific Islander
- White

**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 the previous reporting period. 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

**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 the previous reporting period. 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.
**IND-GEN - Selecting Individual's Veteran Status**

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
- Faculty is not a Veteran
- Veteran - Prior Service
- Faculty not Reported

**Note:** This Block will prepopulate for prior records with data submitted in the previous reporting period. 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.

<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>(13) Block 11</td>
<td></td>
</tr>
</tbody>
</table>

Figure 25. IND-GEN - Entering BHW-Funded Financial Award Information

Select Whether Individual Received BHW Financial Award?: Select whether each faculty member received BHW-funded financial assistance during the annual reporting period by clicking on the drop-down menu under Column 12 and choosing one of the following options (for students, select ‘No’):

- Yes
- No

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

- If the faculty received a BHW-funded financial award or any form of financial assistance was paid on their behalf, enter the total amount of BHW dollars provided during the annual reporting period in the textbox under the column labeled "Stipend". The total amount reported should account for all BHW dollars including those applied to travel, training and conferences, as allowed by federal statutes and regulations.

- If the faculty did not receive a BHW-funded financial award, enter "0" in the textbox under the column labeled "Stipend".

- If the individual is a student, select ‘No’ under Column 12 and enter "0" in the textbox under the column labeled "Stipend."
Note: Please record all BHW financial assistance paid on behalf of faculty or students for travel, conferences and trainings. This is **NOT** referring to financial awards given directly to students or faculty.
IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

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

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

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

Note: If a faculty did not receive BHW-funded financial assistance during the annual reporting period, select "0" under Column 22.

Note: If an individual had financial assistance for ½ an academic year, please round up. For example, if a student or faculty member has received financial assistance for 1 ½ years, please enter 2.

Note: If a faculty received BHW-funded financial assistance for the first time during the annual reporting period, select "1" under Column 22.

Note: For students who do not receive funding, please select "0" under Column 22.
IND-GEN - Selecting Individual's Academic or Training Year

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

- Non-degree Training Year 1
- Undergraduate Year 2
- Undergraduate Year 4
- Undergraduate Year 1
- Undergraduate Year 3
- N/A

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

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

**Figure 28. 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 each individual's profession and discipline by clicking on the drop-down menu under Block 16 and choosing one of the following options:

- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental 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 Informatics
- Other - Midwife
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - NP - Adult
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Other advanced nurse specialists
- Nursing - Nurse administrator
- Nursing - Nurse midwife
- Nursing - PhD - Leadership
- Student - Registered Nurse - BSN

Note: For students in the BSN program, use the student selection. For faculty, select their profession and discipline.
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 experiential training in a primary care setting during the annual reporting period by clicking on the drop-down menu under Block 17 and choosing one of the following options:

- Yes
- No
- N/A

**Warning:** Select "N/A" in the drop-down menu under Block 17 for faculty.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Figure 31. IND-GEN - Entering Training Information in a Medically Underserved Community

Training in a Medically Underserved Community: Select Whether Individual Received Training:

Select whether each individual received experiential training in a medically underserved community (MUC) during the annual reporting period by clicking on the drop-down menu under Column 31 and choosing one of the following options:

- Yes
- No
- N/A
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

![Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.](image)

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

Select whether each individual received experiential training in a rural area during the annual reporting period by clicking on the drop-down menu and choosing one of the following options:

- Yes
- No
- N/A
IND-GEN - Selecting Whether Individual Left the Program Before Completion

Select Whether Individual Left the Program Before Completion: Select whether each individual permanently left the degree 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**

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

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

**Figure 34. IND-GEN - Entering Graduation/Completion Information**

**Select Whether Individual Graduated/Completed the Program:** Select whether each individual completed the degree program or faculty development 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

**Select Degree Earned:** If a student graduated from their degree program during the annual reporting period, select the type of degree earned through the program by clicking on the drop-down menu under Block 22a and choosing **one** of the options listed below.

**If a student did not graduate during the annual reporting period or is a faculty member,** select "N/A" under Block 22a.

- BSN
- N/A

**Select Individual's Post-Graduation/Completion Intentions:** If a student graduated from their degree program during the annual reporting period, select the student's training or employment intentions by clicking on the drop-down menu under Block 22b and choosing **all that apply** from...
If a student did not graduate during the annual reporting period or is a faculty member, select "N/A" under Block 22b.

- Individual intends to apply to an advanced nursing degree program
- Individual intends to practice in a primary care setting
- None of the above
- N/A

- Individual intends to practice in a medically underserved area
- Individual intends to practice in a rural area
- Not Reported
IND-GEN - Entering the % FTE Individual Spent in Different Roles

Enter the % FTE Individual Spent on the Following Roles:

<table>
<thead>
<tr>
<th>Roles</th>
<th>Column</th>
<th>Block</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>40</td>
<td>24a</td>
</tr>
<tr>
<td>Teaching</td>
<td>41</td>
<td>24b</td>
</tr>
<tr>
<td>Administration</td>
<td>42</td>
<td>24c</td>
</tr>
<tr>
<td>Clinical</td>
<td>43</td>
<td>24d</td>
</tr>
</tbody>
</table>

Figure 35. IND-GEN - Entering the % FTE Individual Spent in Different Roles

Enter the % FTE Individual Spent on the Following Roles: Research: Enter the percentage of time each faculty spent in 'Research' during the annual reporting period in Column 40 (Block 24a).

Enter the % FTE Individual Spent on the Following Roles: Teaching: Enter the percentage of time each faculty spent in 'Teaching' during the annual reporting period in Column 41 (Block 24b).

Enter the % FTE Individual Spent on the Following Roles: Administration: Enter the percentage of time each faculty spent in 'Administration' during the annual reporting period in Column 42 (Block 24c).

Enter the % FTE Individual Spent on the Following Roles: Clinical: Enter the percentage of time each faculty spent in 'Clinical' during the annual reporting period in Column 43 (Block 24d).

Note: For students, enter ‘0’ under each Block 24. For faculty, the percentage time in all four faculty areas must total 100%.
Enter # of Articles Published in Peer-Reviewed Journals: Enter the number of articles published by each faculty in peer-reviewed journals during the annual reporting period in the textbox under Block 25.

Note: For students, enter ‘0’ under Block 25.

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

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

Select whether current training/employment data are available for each individual by clicking on the drop-down menu in Column 13 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 student’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.
**NEPQR-Veterans Bachelor of Science Nursing (VBSN)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual applied and was accepted into an advanced nursing degree program</td>
<td>• Individual applied and was accepted into an advanced nursing degree program</td>
</tr>
<tr>
<td>Individual applied to an advanced nursing degree program and has not yet received acceptance</td>
<td>• Individual applied to an advanced nursing degree program and has not yet received acceptance</td>
</tr>
<tr>
<td>Individual currently practices in a primary care setting</td>
<td>• Individual currently practices in a primary care setting</td>
</tr>
<tr>
<td>None of the above</td>
<td>• None of the above</td>
</tr>
<tr>
<td>N/A</td>
<td>• N/A</td>
</tr>
<tr>
<td>Individual applied but was not accepted into a nursing program</td>
<td>• Individual applied but was not accepted into a nursing program</td>
</tr>
<tr>
<td>Individual currently practices in a medically underserved area</td>
<td>• Individual currently practices in a medically underserved area</td>
</tr>
<tr>
<td>Individual currently practices in a rural area</td>
<td>• Individual currently practices in a rural area</td>
</tr>
<tr>
<td>Not Reported</td>
<td>• Not Reported</td>
</tr>
</tbody>
</table>

**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 following options:

- No
- Yes
- N/A

**Select Whether a Partner Organization Hired this Individual:**

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

- Yes
- No
- N/A

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

- Academic Institution
- Critical Access Hospital
- Other Clinical Training Site
- Area Health Education Center
- FQHC or Look-Alike
- Rural Health Clinic
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.
Experiential Characteristics—EXP Subforms

EXP - Introduction

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

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

2. Order of Forms:

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

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

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

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

EXP-1 - Entering Site Name

Site Name:

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

Note: There is an option to delete both new and prior records on EXP-1. This option should only be used if the clinical sites will not be used in the future, or were erroneously entered. The delete option is not reversible (i.e. if the site was erroneously deleted, it will need to be re-entered again).
Select Whether the Site was Used in the Current Reporting Period: For all records, select whether each site was used during the annual reporting period by clicking on the drop-down menu located under the column labeled "Select Whether Site Was used in the Current Reporting Period" and choosing one of the following options:

- Yes
- No

Warning: For new records, you must select "Yes" under the column labeled "Select Whether Site Was used in the Current Reporting Period".

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
Select Type of Site Used: Select the type of site used to train individuals during the current reporting period by clicking on the drop-down menu under Column 3 and choosing from one of the following options:

- Academic institution
- Aerospace operations setting
- Assisted Living Community
- Community-based care programs for elderly mentally challenged individuals
- Day and home care programs (e.g. Home Health)
- Dentist Office
- Dental Services
- Geriatric ambulatory care and comprehensive units
- Hospice
- 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)
- 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
- Hospital
- Indian Health Service (IHS) site
- Local health department
- Nurse Managed Health Clinics
- Other
- Physician Office
- Senior Centers
- Rural Health Clinic
- Surgery Clinic
- 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
- 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
- Veterans Affairs Healthcare (e.g. VA Hospital or clinic)
Health Resources and Services Administration
Bureau of Health Workforce

- State Health Department
- Tribal Health Department
- Tribal Organization
- Veterans Affairs Hospital or clinic

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

Select Type of Setting Where the Site was Located: Select whether each site used to train students during the annual reporting period was located in designated settings by clicking on the drop-down menu under Column 4 and choosing all that apply from the following options.

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

"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

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

- Academic department - outside the institution
- Day and home care programs (i.e. Home Health)
- Ambulatory practice sites
- Community Mental Health Center
- Geriatric ambulatory care and comprehensive units
- Federal Government - ACL
- Federal Government - CDC
- Extended care facilities
- Hospice
- Federal Government - SAMHSA
- Nursing home
- Professional Associations
- State Governmental Programs
- Health department - Local
- Health disparities research center
- Nonprofit organization (non - faith based)
- Academic department - within the institution
- Alzheimer's Association/Chapters
- Area Agencies on Aging
- Educational institution (Grades K - 12)
- Federal Government - Other HRSA Program
- Geriatric consultation services
- Federal Government - FDA
- Federal Government - NIH
- Federal Government - Other HHS Agency/Office
- Local Government
- Other
- Quality improvement organization
- Tribal Government
- Health department - State
- Health policy center
- Nurse Managed Health Clinics
- Community Health Center (CHC)
- Alzheimer's Disease Resource Centers
- Community - based health center (e.g.; free clinic)
- Federal Government - Veterans Affairs
- Geriatric Behavioral or Mental Health Units
- Federal Government - AHRQ
- Federal Government - IHS
- Federal Government - Other
- Hospital
- Long-term care facility
- Physical therapy/Rehabilitation center
- Senior Center
- Tribal Organization
- Health department - Tribal
- Nonprofit organization (faith - based)
- Private/For - profit organization
Warning: You may not select "No partners/consortia used" in combination with any other option.

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

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

- Adolescents
- Homeless individuals
- Lesbian/Gay/Bisexual/Transgender
- Military and/or military families
- Pregnant women and infants
- Undocumented Immigrants
- Veterans
- None of the above
- Children
- Individuals with HIV/AIDS
- Low income persons/families
- Older adults
- Refugee Adults
- Unemployed
- Victims of abuse or trauma
- Chronically ill
- 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

⚠️ 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 44. EXP-1 - Entering Site's geographical Data

State:

City:

**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
**EXP-1 - Selecting any HHS Priorities Addressed at this Site**

<table>
<thead>
<tr>
<th>Select any HHS Priorities Addressed at this Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>(14)</td>
</tr>
</tbody>
</table>

Figure 46. EXP-1 - Selecting any HHS Priorities Addressed at this Site

**Select any HHS Priorities Addressed at this Site:**

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

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

💡 **To Complete the Form:** Click on the "Save and Validate" button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
EXP-2: Experiential Characteristics - Trainees by Profession/Discipline

EXP-2 - Selecting Training Program and Site Name

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

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

Figure 47. 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.

Site Name:

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

- Nursing - BSN - Generalist
- Nursing - BSN - RN to BSN completion

Principal trainees are those who were directly or indirectly supported through your grant. For your grant program, these are the individuals reported on the INDGEN form. “Other Interprofessional” trainees are those individuals who trained at the same site on an interdisciplinary team with your principal trainees, but who did not received support from or have an association with your HRSA grant.

Do not select professions/disciplines for faculty, site staff, or other non-trainees.
**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)</td>
</tr>
<tr>
<td>Block 3</td>
</tr>
</tbody>
</table>

**Figure 49. EXP-2 - Entering # Trained in the Profession and Discipline**

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

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

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

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

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

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

**Figure 50. EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care**

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

⚠️ **Warning:** Do not count faculty, staff, or other non-trainees.
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.

- 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
- Hospice
- 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
- 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
- Hospital
- Indian Health Service (IHS) site
- Local health department
- Nurse Managed Health Clinics
- Other
- Physician Office
- Senior Centers
- Rural Health Clinic
- Surgery Clinic
- 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
- 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
- Veterans Affairs Healthcare (e.g. VA Hospital or clinic)
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.
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.

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

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

**CDE - Introduction**

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

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

**Order of Forms:**

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

**Pre-population of Prior Records:**

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

**Creation of New Records:**

- The BPMH system will allow you to enter information for newly offered courses or training activities (i.e., “New Record”) in the CDE-1 data table. “New Records” will populate below all “Prior Records”
- For “New Records” you must indicate whether the course was offered during the current reporting period.
Detailed guidance on how to make the correct selections for the CDE forms can be found below.
CDE-1: Course Development and Enhancement - Course Information

CDE-1 - Setup
To begin providing data about courses and other training activities that have been developed or enhanced through the grant or to provide updates on previously reported activities, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.

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

Figure 53. 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.

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

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

![Figure 54. CDE-1 - Entering the Name of Course/Training Activity](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.

**Warning:** Complete the CDE-1 Setup form only if grant funds were used to develop or enhance courses or training activities other than those previously reported. You do not need to reenter information about courses or training activities previously reported.

**Note:** To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
CDE-1 - Selecting Type of Course or Training Activity

Select Type of Course or Training Activity: To begin completing the CDE-1 subform for new records, select the type of course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu under Column 2 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

Note: If you need to delete a new record for any reason, simply click on “Delete” under the column labeled "Options".

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

Note: This Block will prepopulate for prior records with data submitted in the previous reporting period.
CDE-1 - Selecting whether Course was Newly Developed or Enhanced

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

Figure 56. CDE-1 - Selecting whether Course was Newly Developed or Enhanced

Select whether Course or Training Activity was Newly Developed or Enhanced: For new records, select whether each course or training activity identified under Block 1 was newly developed or was enhanced by clicking on the drop-down menu under Column 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.
- Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.

Note: This Block will prepopulate for prior records with data submitted in the previous reporting period.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Select Status of Development or Enhancements: For all records, select each course or training activity's current status by clicking on the drop-down menu under Column 4 and choosing one of the following options:

- Developed not yet implemented
- Implemented
- Under development

Note: For prior records, this field will be editable from the previous reporting period.
CDE-1 - Selecting Delivery Mode

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

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

Note: This Block will prepopulate for prior records with data submitted in the previous reporting period.
Select Primary Topic Area: elect the primary topic area for each course or training activity that was developed or enhanced by clicking on the drop-down menu under Column 11 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
- Behavioral Health - Substance Abuse - General
- Behavioral Health - Treatment
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Telehealth
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed
- Behavioral Health - Substance Abuse - Opioids
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
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, and data collection and analysis. Clinical Training - Technology - Other incorporates the following topic areas: telemedicine, informatics, and electronic medical records.
### CDE-1 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

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

(12)

**Figure 60. 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 and selection one of the options below:

- Offered
- Not Offered
- 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.

Warning: CDE-1 form must be completed and validated prior to beginning the CDE-2 form.

<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 61. CDE-2 - Adding Courses and Profession/Disciplines

Name of Course or Training Activity:

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

Profession and Discipline of Individuals Trained:

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

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Endodontic Dentistry

NEPQR-Veterans Bachelor of Science Nursing (VBSN)
Behavioral Health - Pastoral/Spiritual Care
Dentistry - General Dentistry
Dentistry - Other
Dentistry - Dental Hygiene/Public Health
Dentistry - Public Health Dentistry
Medicine - Aerospace Medicine
Medicine - Colon and Rectal Surgery
Medicine - Family Medicine
Medicine - Integrative Medicine
Medicine - Internal Medicine/Pediatrics
Medicine - Neurology
Medicine - Occupational Medicine
Medicine - Other
Medicine - Pediatrics
Medicine - Plastic Surgery - Integrated
Medicine - Preventive Medicine/Internal Medicine
Medicine - Radiation Oncology
Medicine - Thoracic Surgery
Medicine - Vascular Surgery - Integrated
Nursing - CNS - Geropsychiatric
Nursing - CNS - Psychiatric/Mental health
Nursing - Licensed practical/vocational nurse (LPN/LVN)
Nursing - NP - Adult gerontology
Dentistry - Dental Hygiene
Dentistry - Oral Surgery Dentistry
Dentistry - Pathology Dentistry
Dentistry - Periodontic Dentistry
Dentistry - General Dentistry/Public Health
Medicine - Allergy and Immunology
Medicine - Dermatology
Medicine - Geriatric Psychiatry
Medicine - Internal Medicine
Medicine - Medical Genetics
Medicine - Nuclear Medicine
Medicine - Ophthalmology
Medicine - Otolaryngology
Medicine - Physical Medicine and Rehabilitation
Medicine - Preventive Medicine
Medicine - Preventive Medicine/Public Health
Medicine - Radiology - Diagnostic Medicine - Thoracic Surgery - Integrated
Nursing - CNS - Adult gerontology
Nursing - CNS - Neonatal
Nursing - CNS - Women's health
Nursing - NP - Acute care adult gerontology
Nursing - NP - Adult Psychiatric/Mental health
Nursing - NP - Family
Nursing - NP - Neonatal
Nursing - Nurse administrator
Nursing - Nurse informaticist
Dentistry - Orthodontic Dentistry
Dentistry - Pediatric Dentistry
Dentistry - Prosthodontic Dentistry
Dentistry - Radiology Dentistry
Medicine - Anesthesiology
Medicine - Emergency Medicine
Medicine - Geriatrics
Medicine - Internal Medicine/Family Medicine
Medicine - Neurological Surgery
Medicine - Obstetrics and Gynecology
Medicine - Orthopaedic Surgery
Medicine - Pathology - Anatomical and Clinical
Medicine - Plastic Surgery
Medicine - Preventive Medicine/Family Medicine
Medicine - Psychiatry
Medicine - Surgery - General
Medicine - Urology
Nursing - CNS - Family
Nursing - CNS - Pediatrics
Nursing - Home Health Aide
Nursing - NP - Acute care pediatric
Nursing - NP - Child/Adolescent Psychiatric/Mental Health
Nursing - NP - Family Psychiatric/Mental Health
Nursing - NP - Pediatrics
Nursing - Nurse anesthetist
Nursing - Nurse midwife
Nursing - Researcher/Scientist
Other - Community Health Worker
Other - First Responder/EMT
Other - Lay and Family Caregiver
Other - Midwife
Other - Optometry
Health Resources and Services Administration
Bureau of Health Workforce

- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Public health nurse
- Other - Audiology
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Radiologic technology
- Other - Speech Pathology
- Other - Occupational Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Student - Certified Nursing Assistant
- Student - CNS - Adult gerontology
- Student - CNS - Psychiatric/Mental health
- Student - Dental Hygiene
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Other Behavioral Health
- Student - Graduate - Social Work
- Student - Medical School
- Student - NP - Family
- Student - NP - Psychiatric/Mental health

- Nursing - Registered Nurse
- Other - Chiropractic
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Medical Laboratory Technology
- 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
- Student - Chiropractic School
- Student - CNS - Family
- Student - CNS - Women's health
- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Psychology
- Student - Home Health Aide
- Student - NP - Acute care adult gerontology
- Student - NP - Geropsychiatric
- Student - NP - Women's health
- Student - Registered Nurse - BSN
- Student - Podiatry School

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- Other - Profession Not Listed
- Other - Respiratory Therapy
- Other - Veterinary Medicine
- Other - Speech Therapy
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Student - Alternative/Complementary Nursing
- Student - CNS - Geropsychiatric
- Student - Dental Assistant
- Student - Diploma/Certificate
- Student - Graduate - Other
- Student - Graduate - Public Health
- Student - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - NP - Adult gerontology
- Student - NP - Other advanced nurse specialists
- Student - Physician Assistant
- Student - Undergraduate - Other
- Student - BSN Generalist

NEPQR-Veterans Bachelor of Science Nursing (VBSN)
Health Resources and Services Administration
Bureau of Health Workforce

- Student - Post - high school / Pre-college
- Student - Undergraduate - Public Health
- Student - RN to BSN completion
CDE-2 - Entering # Trained in the Profession and Discipline

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

Once you have completed Columns 1 through 3 for all rows, click ‘Save and Validate’ to automatically populate Columns 4 through 9 with responses from CDE-1.
CDE-2 - Selecting Type of Course or Training Activity

Select Type of Course or Training Activity:

Column 4 (Block 2), Type of Course or Training Activity will automatically populate with response from CDE-1 form.

- 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-2 - Selecting whether Course was Newly Developed or Enhanced

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

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

- Enhanced
- Newly developed
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
- Grand rounds
- Simulation-based Training
- Distance learning (Online Webinar)
- Experiential/Field-based
- Hybrid
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
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

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

Notice to Grantees about Forms Pertaining to Faculty Development

The FD-1a and FD-1b subforms have been enhanced to prepopulate specific information about the names and characteristics of structured faculty development programs reported previously. Please read the following instructions carefully to ensure the FD-1a and FD-1b subforms are completed accurately.

For structured faculty development programs reported previously: The BPMH system will prepopulate the certain Blocks in the FD-1a subform.

⚠️ 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 FD-1a Step 2. 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: Faculty Development - Structured Faculty Development Training Programs

FD-1a - Adding Structured Faculty Development Programs

⚠️ Warning: The FD-1a and FD-1b subforms will only appear if "Structured Faculty Development Training Program" was selected in the Faculty Development Setup form.

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

Program Name:

- To begin completing the FD-1a subform for new records, enter the name of each structured faculty development program coordinated and/or supported through the grant during the annual reporting period.
- Next, click the "Add Record" button to save your entry. Repeat this process to enter each faculty development program that was coordinated and/or supported through the grant during the annual 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. You do not need to reenter information about structured faculty development programs previously reported. To provide updates for these programs, skip to the instructions for the next step.

💡 Note: If an entry needs to be deleted for any reason, simply click on “Delete” under the column labeled "Options".

Example: The John Doe School of Nursing used BHW funds to support TeamSTEPPS training for ten (10) faculty members. In the first semester, the school used grant funds to pay for the costs of training three (3) faculty members. In the second semester, the school used grant funds to pay for the...
costs of training an additional seven (7) faculty members.
Since each faculty development program supported through the grant must be reported separately, the John Doe School of Nursing would have 2 entries—TeamSTEPPS #1 and TeamSTEPPS #2 (names are for illustrative purposes only). The John Doe School of Nursing would complete the FD-1a and FD-1b subforms for each of these programs.
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

⚠️ Warning: If no additional structured faculty development programs were supported through the grant during the annual reporting period other than those previously reported, skip to the step named "FD-1a — Entering # of Faculty Who Completed the Program".

💡 Note:

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

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

<table>
<thead>
<tr>
<th>Block 2</th>
<th>Block 2a</th>
<th>Block 2b</th>
<th>Block 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
</tbody>
</table>

Figure 70. FD-1a - Entering Program Information for Degree/Non-Degree Programs

Select Whether this was a Degree Bearing Program: To complete Block 2 for new records, select whether each faculty development training program that was supported through the grant during the 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 'Yes' was selected for Block 2, select the type of degree that participants will earn when completing each program by clicking on the drop-down menu under Block 2a and choosing one of the options listed below. If 'No' was selected for Block 2, select 'N/A'.

- BA
- BS
- BSW
- DDS/MPH
- DMD
- BCHS
- Certificate
- DC
- DDS/MSPH
- DMD
- DMD
- BPH
- BSN
- DDS
- Diploma
- DMD/MSPH

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For Degree-bearing Programs: Select Primary Focus Area: If a faculty development program will culminate in awarding participants with an academic degree in dentistry, nursing, or public health, select the degree's focus area by clicking on the drop-down menu under Block 2b and choosing one of the options listed below. If 'No' was selected for Block 2, select 'N/A'.

- Nursing - Clinical Research
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Leadership
- Nursing - NP - Adult
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - Education
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family
- Nursing - NP - Neonatal
Health Resources and Services Administration
Bureau of Health Workforce

- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Other advanced nurse specialty
- Nursing - Nurse Administrator
- Nursing - Nurse Midwife
- Nursing - Public Health Nurse
- N/A

- Nursing - NP - Pediatrics
- Nursing - Nurse Anesthetist
- Nursing - Nurse Researchers/Scientists
- Other - Midwife

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 for Block 2, enter the length of each program in clock hours in the textbox under Block 3.

Note: These Blocks will be prepopulated for prior records based on data submitted in the previous reporting period.
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>Enter the % of Time Spent Developing Competencies for the Following Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinician</td>
<td>Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Clinician' role (Column #6).</td>
</tr>
<tr>
<td>Administrator</td>
<td>Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Administrator' role (Column #7).</td>
</tr>
<tr>
<td>Educator</td>
<td>Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Educator' role (Column #8).</td>
</tr>
<tr>
<td>Researcher</td>
<td>Enter the percentage of time spent in each faculty development program developing competencies associated with the 'Researcher' role (Column #9).</td>
</tr>
</tbody>
</table>

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 the previous reporting period.
Enter # of Faculty Who Completed the Program

(10)
Block 6

Figure 72. 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 who completed each program during the annual reporting period in the textbox under Block 6.

Note: If a structured faculty development program was marked as "Ongoing" in Block 1a, enter "0" 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

Figure 73. 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: To complete the FD-1a subform for new records, select whether any faculty who participated in a training program received any type of BHW-funded financial award by clicking on the drop-down menu under 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 (e.g., conference/workshop or other activity to include registration fees, travel and per diem) during the annual reporting period for participating in a structured faculty development program.

Note: This Block will prepopulate for prior records with data submitted in the previous 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-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>(1)</td>
<td>(2) Block 4</td>
</tr>
</tbody>
</table>

Figure 74. 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.

Profession and Discipline of Faculty Trained: Next, select the profession(s) and discipline(s) of all faculty who participated in each faculty development program 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 to capture all individuals who participated in each faculty development program during the annual reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Family Medicine
- Nursing - NP - Family
- Medicine - Other
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Medicine - Geriatric Psychiatry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
- Medicine - Geriatrics

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- Medicine - Pediatrics
- Medicine - Aerospace Medicine
- Medicine - Allergy and Immunology
- Other - Pharmacy
- Medicine - Dermatology
- Public Health - Health Policy & Management
- Medicine - Preventive Medicine/Family Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- 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 - Optometry
- Nursing - NP - Neonatal
- Nursing - Public health nurse

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- Medicine - Internal Medicine
- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Psychiatry
- Nursing - Other
- Medicine - Colon and Rectal Surgery
- Medicine - Occupational Medicine
- Public Health - Other
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Adult
- Nursing - NP - Adult gerontology
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Women's health
- Nursing - Nurse anesthetist
- Medicine - Thoracic Surgery
- Medicine - Urology
- Nursing - CNS - Neonatal
- Nursing - NP - Neonatal
- Nursing - NP - Acute care pediatric
- Medicine - Integrative Medicine
- Other - Community Health Worker
- Medicine - Preventive Medicine
- Medicine - Medical Genetics
- Medicine - Anesthesiology
- Medicine - Obstetrics and Gynecology
- Physician Assistant
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Geropsychiatric
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Pediatrics
- Other - Podiatry
- Nursing - Nurse midwife
- Other - Veterinary Medicine

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- Nursing - NP - Pediatrics
- Other - Midwife
FD-1b - Entering # Trained in the Profession and Discipline

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

![Image](36x286 to 55x315)

**Figure 75. FD-1b - Entering # Trained in the Profession and Discipline**

**Enter # Trained in this Profession and Discipline:** Enter the number of faculty in that profession and discipline who participated in each structured faculty development program during the annual reporting period in the textbox beside the drop-down menu. **Repeat this step as many times as necessary to capture the total number of faculty by profession and discipline who participated in each structured training 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

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](1)

Figure 76. FD-2a - Entering Faculty Development Activities

Activity Name:

- To begin completing the FD-2a subform, enter the name of each faculty development activity (unstructured) 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.

Example: The John Doe School of Nursing used BHW funds to pay for the cost of sending five (5) faculty members to the annual Academy Health conference. In addition, the school also used BHW funds to pay for the cost of sending two (2) faculty members to a local workshop on the integration of behavioral health and primary care.

Since each faculty development activity supported through the grant must be reported separately, the John Doe School of Nursing would have 2 entries—one entry for the Academy Health annual Conference and one for the Integration of Behavioral Health and Primary care workshop (names are for illustrative purposes only). The John Doe School of Nursing would complete the FD-2a and FD-2b subforms for each of these activities.
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 77. 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: Select whether these are accredited for continuing education credit by clicking on the drop-down menu under Block 8a and choosing one of the following options:

- Yes
- No
For Courses or Workshops: Select Whether Attendance was to Acquire or Maintain Professional Certification: Select whether attendance by faculty was for the purposes of acquiring or maintaining a professional certification by clicking on the drop-down menu under Block 8b and choosing one of the following options:

- Yes
- No
- N/A

Note: If "Academic Course for Continuing Education" or "Training/Workshop for Continuing Education" was selected under Block 8, select 'Yes' or 'No' for Blocks 8a and 8b. If any other option was selected under Block 8, select "N/A" under Blocks 8a and 8b.
FD-2a - Entering Duration of Training Activity

Enter Duration of Training Activity in Clock Hours

(5)
Block 9

Figure 78. 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 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. Example: a 15-minute course would entered as $15/60 = .25$. 

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**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
- Distance learning (Online Webinar)
- Experiential/Field-based
- Clinical Rotation
- Hybrid
- Grand Rounds

---

**Figure 79. FD-2a - Selecting Delivery Mode**
### FD-2a - Selecting Faculty Role(s)

**Select the Faculty Role(s) Addressed at Training Activity**

<table>
<thead>
<tr>
<th>(7) Block 11</th>
</tr>
</thead>
</table>

Figure 80. 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></td>
<td>(1)</td>
</tr>
<tr>
<td></td>
<td>(2) Block 12</td>
</tr>
</tbody>
</table>

Figure 81. FD-2b - Adding Profession and Discipline for Activities

**Activity Name:** To add information about the profession(s) and discipline(s) of faculty who participated in each activity during the annual reporting period, select an activity by clicking on the drop-down menu next to "Activity Name" and choosing one of the available options.

**Profession and Discipline of Faculty Trained:** Select the profession(s) and discipline(s) of all faculty who participated in each activity by choosing all that apply from the options listed below.

Next, click on the "Add Record" button to save your entry. **Repeat this process to capture the professions and disciplines of all faculty members who participated in each faculty development activity during the annual reporting period.**

- Behavioral Health - Clinical Psychology
- Behavioral Health - Other Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Oral Surgery Dentistry
- Dentistry - Pathology Dentistry
- Dentistry - Prosthodontic Dentistry
- Medicine - Emergency Medicine
- Medicine - Family Medicine
- Nursing - NP - Family
- Behavioral Health - Clinical Social Work
- Behavioral Health - Marriage and Family Therapy
- Dentistry - Endodontic Dentistry
- Dentistry - Orthodontic Dentistry
- Dentistry - Pediatric Dentistry
- Dentistry - Public Health Dentistry
- Nursing - CNS - Psychiatric/Mental health
- Behavioral Health - Counseling Psychology
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Other
- Dentistry - Periodontic Dentistry
- Dentistry - Radiology Dentistry
- Nursing - NP - Child/Adolescent Psychiatric/Mental Health
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- Medicine - Other
- Medicine - Pediatrics
- Medicine - Aerospace Medicine
- Medicine - Allergy and Immunology
- Other - Pharmacy
- Medicine - Dermatology
- Public Health - Health Policy & Management
- Medicine - Preventive Medicine/Family Medicine
- Public Health - Disease Prevention & Health Promotion
- Public Health - Epidemiology
- Medicine - Internal Medicine/Pediatrics
- Medicine - Neurology
- Nursing - CNS - Family
- Medicine - Orthopaedic Surgery
- Medicine - Pathology - Anatomical and Clinical
- Nursing - NP - Acute care adult gerontology
- 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 - Optometry
- Nursing - NP - Neonatal
- Nursing - Public health nurse

- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Nursing - Registered Nurse
- Medicine - Internal Medicine/Family Medicine
- Medicine - Psychiatry
- Nursing - Other
- Medicine - Colon and Rectal Surgery
- Medicine - Occupational Medicine
- Public Health - Other
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Public Health - Infectious Disease Control
- Public Health - Social & Behavioral Sciences
- Medicine - Nuclear Medicine
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Nursing - NP - Adult
- Nursing - NP - Adult gerontology
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Women's health
- Nursing - Nurse anesthetist
- Medicine - Thoracic Surgery
- Medicine - Urology
- Nursing - CNS - Urology
- Nursing - CNS - Neonatal

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- Medicine - Geriatrics
- Medicine - Integrative Medicine
- Other - Community Health Worker
- Medicine - Preventive Medicine
- Medicine - Medical Genetics
- Medicine - Anesthesiology
- Medicine - Obstetrics and Gynecology
- Physician Assistant
- Medicine - Physical Medicine and Rehabilitation
- Public Health - Biostatistics
- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Medicine - Neurological Surgery
- Nursing - CNS - Adult gerontology
- Medicine - Ophthalmology
- Medicine - Otolaryngology
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Medicine - Plastic Surgery
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Geropsychiatric
- Nursing - Nurse administrator
- Nursing - Nurse educator
- Nursing - Nurse informaticist
- Medicine - Vascular Surgery - Integrated
- Nursing - CNS - Pediatrics
- Other - Podiatry
- Nursing - Nurse midwife
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- Nursing - NP - Acute care pediatric
- Nursing - NP - Pediatrics
- Other - Midwife

Note: Information regarding the names of faculty development activities will prepopulate with the information that was entered and saved in the FD-2a subform.
FD-2b - Entering # Trained in the Profession and Discipline

Figure 82. FD-2b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline: Enter the number of faculty in that profession and discipline who participated in each activity during the annual reporting period in the textbox beside the drop-down menu. **Repeat this step as many times as necessary to capture the total number of faculty 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.
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 83. Screenshot of Printing Your Performance Report
Submitting Your Performance Report

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

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

![Submit Report - Confirm](image)

**Figure 85. 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

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 drop-downs. 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?
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.