Family Nurse Practitioner/ Physician Assistant Technical Assistance Guide

Song-Brown Program

Department of Health Care Access and Information (HCAI)

July 2022

About Song-Brown

- Song-Brown provides funding to education programs:
  - Family Nurse Practitioner/Physician Assistant training programs
  - Registered Nurse education programs
  - Family Medicine, Internal Medicine, Pediatrics, OB/GYN residency programs
  - Licensed Midwifery and Certified Nursing Midwifery training programs
- Song-Brown provides financial incentives to programs to:
  - Graduate individuals who practice in medically underserved areas
  - Enroll members of underrepresented groups in medicine to the program
  - Locate the program's main training site in a medically underserved area
  - Operate a main training site at which the majority of the patients are Medi-Cal recipients

Application Release Dates

Registration: **Open now**
Application release: **July 18, 2022**
Early submission review: **August 16, 2022**
Application deadline: **August 30, 2022**

Application opens and closes at **3:00 p.m.**

Before You Apply

- If your program requires approval to contract from a coordinating authority, please inform the authority of terms and conditions contained in the Grant Agreement.

- Applicants must agree to the terms and conditions before receiving funds.

- HCAI **will not** make changes to the terms and conditions specified in the Grant Agreement.

- Funding shall be used to expand primary care services.

- Funds shall not supplant existing state or local funds to provide primary care services.

Changes for 2022

- New funding opportunities for midwifery programs
  - o Certified Nursing Midwifery (CNM)
  - o Licensed Midwifery (LM)
- Changes to the scoring criteria
- Increasing the number of students supported
- Requesting training site payer mix
- Reducing the types of training sites accepted
- Up to $3,900,000 in funding is available to support FNP and PA training programs
- Up to $1,000,000 in funding is available to support CNM and LM programs
- New Song-Brown staff email: songbrown@hcai.ca.gov

Information to Gather (1/2)
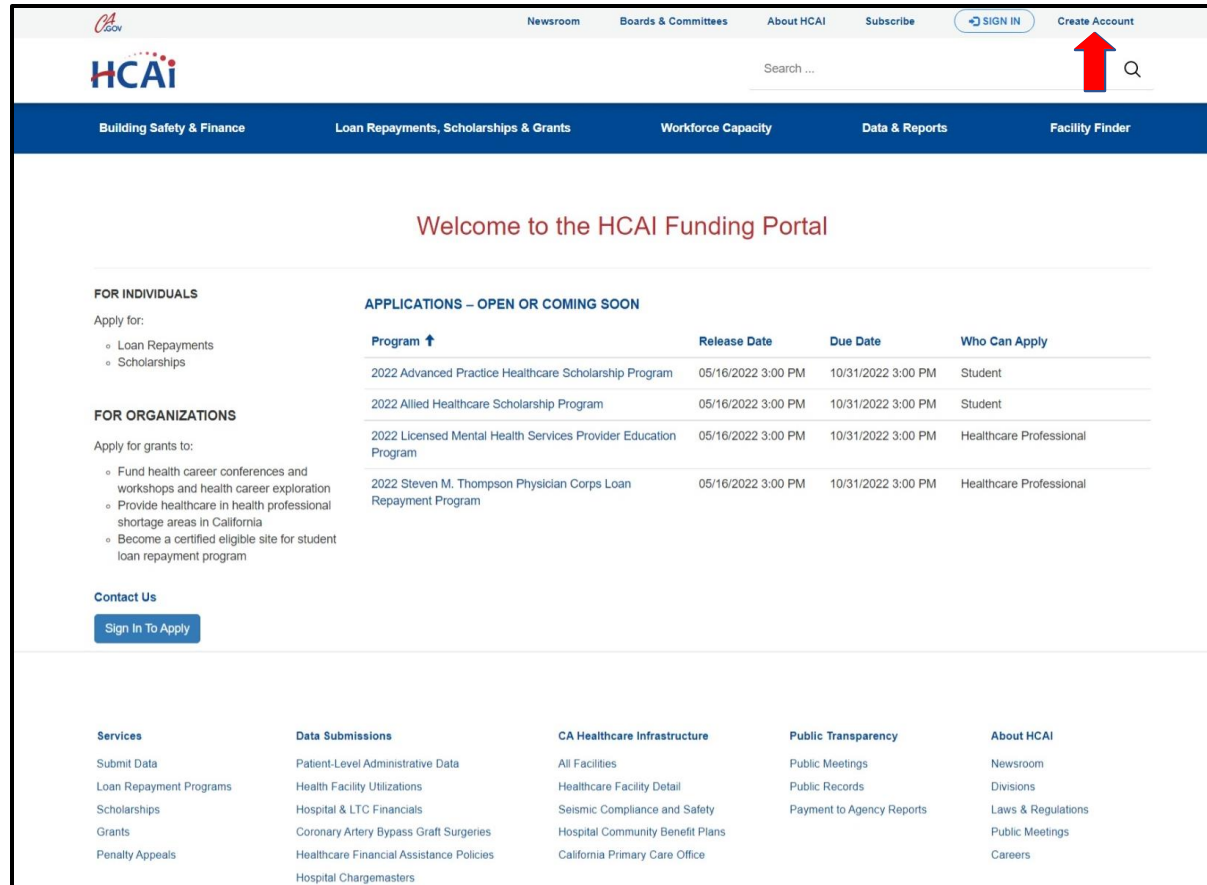
- Grant Agreement and Payee Data record (STD-204) signatories.
- Name and full address of your training sites used in the last academic year. Do not include specialty or elective rotation sites.
- Facility type for each training site.
- Race/ethnicity data for all current students.
- High school information (name and address) for all current students.

Information to Gather (2/2)

- Current practice site information for all graduates entered.

- National Provider Identification number for all graduates entered.

- Applicable required attachments
  - Program approval letter from the California Board of Registered Nursing (BRN)
  - Accreditation Review Commission on Education for the Physician Assistant (ARC-PA) letter
  - Accreditation Commission for Midwifery Education (ACME) letter
  - Midwifery Education and Accreditation Council (MEAC) accreditation letter

eApplication (eApp) Registration

Creating an Account

If you are a new applicant, register now – do not wait.

System Requirements

- For the best experience, use Google Chrome or Microsoft Edge.
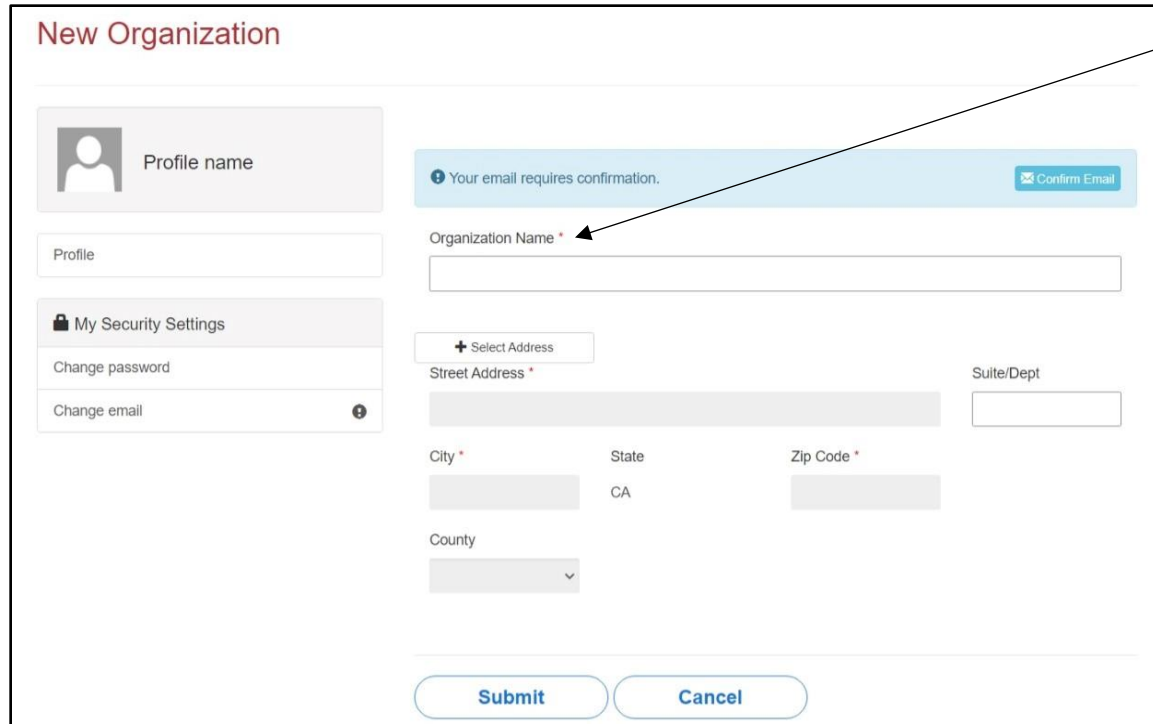
- Internet Explorer is not supported.

Setting up Your Profile

1. Check the "Organization" box to gain access to Song-Brown FNP/PA applications (do not check the "Healthcare Professional" box).
2. Click the magnifying glass to search for a pre-existing organization.
3. Click "Request New Organization" to submit a new organization for approval.
4. Once you have selected or submitted an organization, it will populate the search field.

Note: Most organizations are in the system. Returning applicants should use the search function before requesting a new organization.

Adding a New Organization

1. Enter the new "Organization Name".
2. Click the "+Select Address" button.
3. A new window opens up and you can enter and search for an address.
4. Click the confirmed address and it will auto-populate the address fields on the page.
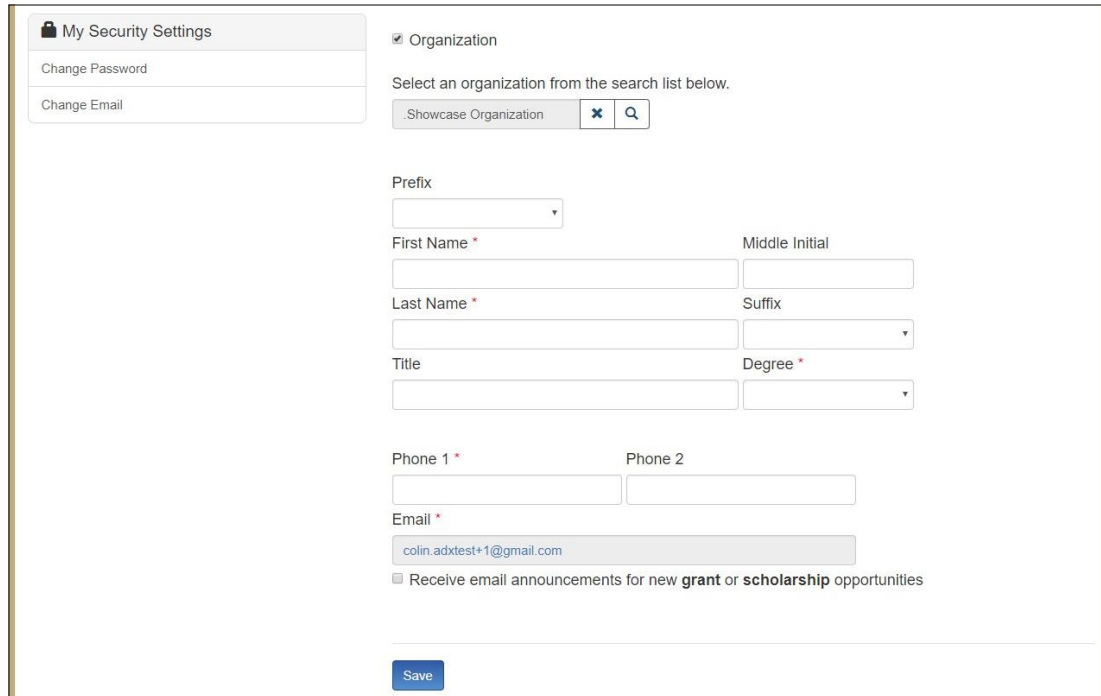
Note: Song-Brown staff will review the new organization request within 5 business days. During this time, you may still begin an application.

Email Confirmation
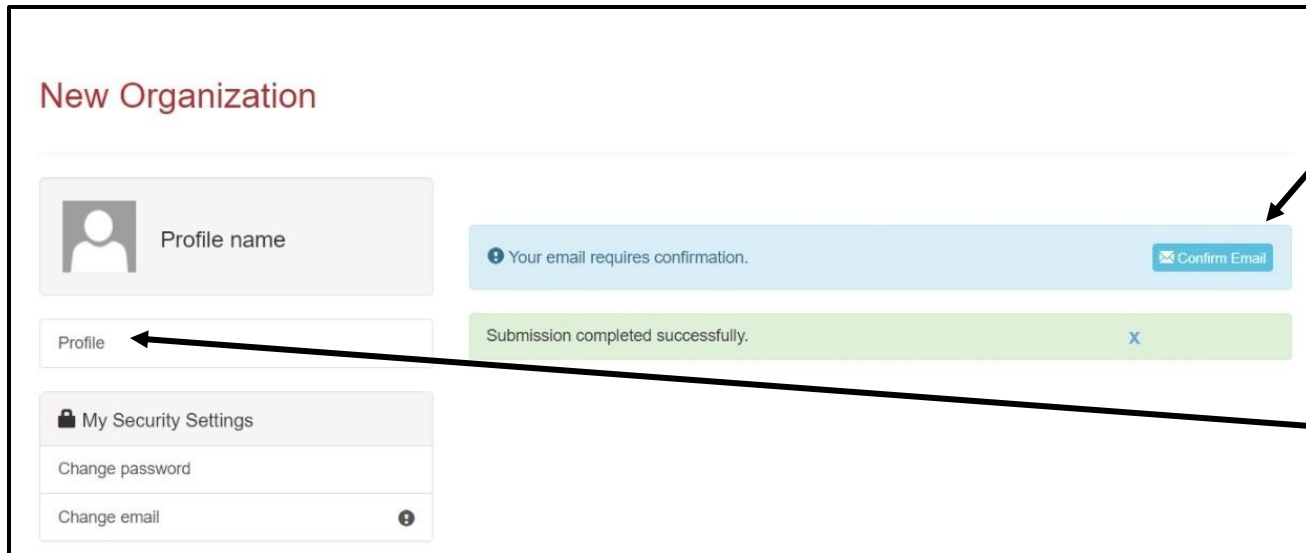
- Click "Confirm Email" to validate your email address for your eApp account

- Click "Profile" to continue completing your profile

Completing Your Profile

1. Enter all required fields. When finished click the "Save" button.
2. If there are no errors on the page, you will receive a message that states your profile has been updated successfully.

Note: Incomplete information may delay your registration.

Account Roles

Dear Matt Damon,

Thank you for validating your Department of Health Care Access and Information (HCAI) Funding e-App account.

At this time, your account is flagged as a Grant Preparer. If you are a Program Director, please email songbrown@hcai.ca.gov to request your account permissions to be upgraded. Only Program Directors may create and submit applications.

Thank you,

Department of Health Care Access and Information
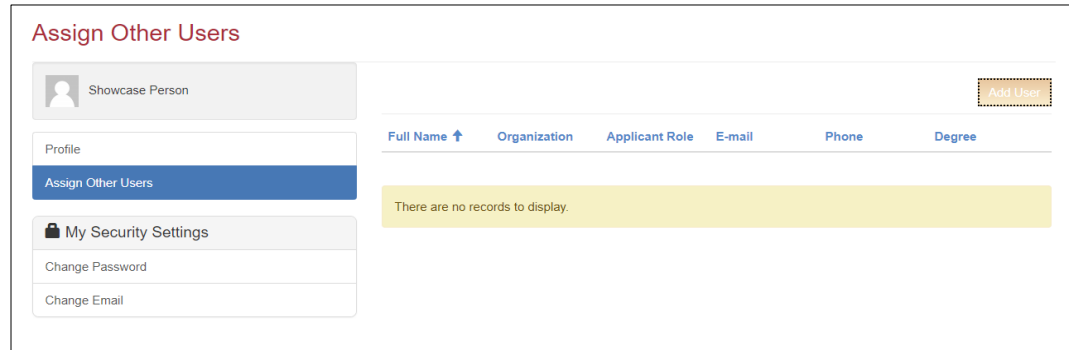
Healthcare Workforce Development Division

This is an automatically generated email. Please do not reply.

1. All newly created accounts are assigned the "Grant Preparer" role.
2. Program Directors must email SongBrown@hcai.ca.gov after they set up their profile to request the "Program Director" role.
3. Only accounts with the "Program Director" role may initiate and submit applications.
4. Once Song-Brown staff approves your request you will receive a follow-up email confirming the approval.

Note: Program Directors may initiate, view, edit, and submit applications. Grant Preparers may view and edit applications only.

Assigning Other Users

1. Program Directors have an additional tab on their "Profile" page called "Assign Other Users".

2. Navigating to this page from your "Profile" page allows you to add users who can view and edit applications only.

3. Click the "Add User" button to give registered Grant Preparers access to your applications.

Note: Grant Preparers must set up their profile before a Program Director can add them to the Grant Preparer list.

Apply Here

1. Navigate to the "Apply Here" page on the main menu.

2. Select the "Song Brown Family Nurse Practitioner/Physician Assistants" link.

Helpful Tips

Useful Information

Navigating the application

Use the "Previous" and "Save & Next" buttons found at the bottom left of each page.

Saving your application

The eApp saves your application each time you click "Save & Next". Navigate to the "Applications-In Progress/Submitted" page to resume your application.

Useful Information, Continued

Asterisks

A red asterisk indicates a required response before you can proceed to the next page.

Training Program Title *

Tooltips

Throughout the application you may see a blue circle with a question mark at the end of a question, title, or sentence. Click on these icons for additional information.

The last name of the primary contact at the contract organization.

Contract Administrator Last Name *

Starting the Application

Program Information

Application – Song-Brown Family Nurse Practitioner/Physician Assistants

Organization
Sample FNP/PA Organization

Program Director
Jane Doe

Program Director Email
oshpd.kara+7@gmail.com

Program Type *
○ Family Nurse Practitioner ○ Physician Assistant ⦿ Combined Family Nurse Practitioner/Physician Assi

Select a training program from the **Training Program Title** search list below. If your training program is no
check the **Training Program not listed** checkbox to add your program's information.

Training Program Title *

☐ Training Program not listed

1. Your program information pre-populates with information you entered in your "Profile" page.
2. The "Organization" name is the applicant's organization as listed on the applicants eApp profile.
3. The "Organization" name is not editable in the application, go to the applicant's profile to change it.
4. Select the "Program Type" you want to apply for.

Program Information: Training Program (1/2)

Application – Song-Brown Family Nurse Practitioner/Physician Assistants

Organization

Sample FNP/PA Organization

Program Director

Jane Doe

Program Director Email

oshpd.kara+7@gmail.com

Program Type *

○ Family Nurse Practitioner ○ Physician Assistant ● Combined Family Nurse Practitioner/Physician Assi

Select a training program from the **Training Program Title** search list below. If your training program is no
check the **Training Program not listed** checkbox to add your program's information.

Training Program Title *

[   ] 🔍

☐ Training Program not listed

1. The "Training Program Title" is the official name of the school's training program and will be listed on the Agreement.

2. Select an existing "Training Program Title" by clicking on the magnifying glass.

3. To link data from prior applications to the new application, you must use the magnifying glass search function to select the "Training Program Title" from the list.

4. If your training program is not listed, check the box "Training Program not listed".

Note: Most training programs are in the system. Use the search function before adding a new training program.

Program Information: Training Program (2/2)

1. If you select the box "Training Program Not Listed", new fields appear.
2. Type in the program name under "Training Program Title". The name must list the school followed by the program type acronym. EX: University of the West, FNP Program.
3. Click the "+Select Address" button.
4. A new window opens and allows you to enter and search for an address.
5. Click the confirmed address and it will auto-populate the address fields on the page.

Note: You will see this feature throughout the application.

Contract Administration (1/2)

1. Before completing this page, you must verify the information with your contracts or finance office to ensure accuracy. Incorrect information delays agreements.
2. Enter the "Contract Organization Name". This is the official business name as reported to the Internal Revenue Service and will be included in the Agreement.
3. Enter the "Grant Agreement Signatory". This is the signatory authorized to enter into a grant agreement on behalf of your organization.
4. Enter the "STD. 204 Signatory". This is the signatory with expertise on tax reporting for your organization.

Contract Administration (2/2)

1. Enter the legal address for your organization.
   - Must match IRS records.
   - Use the "Street Address" lookup if it is a physical address.
2. Enter the remit address for your organization.
   - Use the "Street Address" lookup if it is a physical address.
3. Enter the Authorized Representative for the Payee. This is the person authorized to receive warrants on behalf of the payee.

Program Description

Application SBFNPPA-1000585 – Song-Brown Family Nurse Practitioner/Physician Assistants

12%

Program Description
Please provide an executive summary description of your training program.*

Maximum limit of 2500 characters.
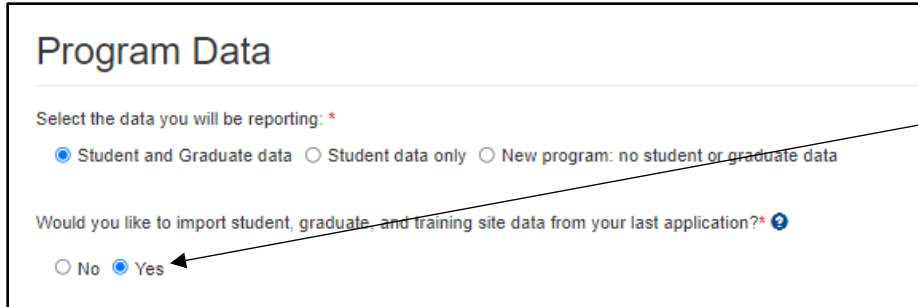
Describe the primary care career pathways and/or pipeline activities your students participate in. In your response, please describe the outreach efforts, curriculum, teaching modalities, successes/challenges, and best practices related to your pipeline program.*

Previous   Save & Next

1. Complete both required fields.
2. There is a maximum 2500 character limit for each question.
3. After completing this page, click "Save & Next".

Note: If you exceed the character limit, you will receive a pop-up message. If you copy and paste text from another document, text will be cut off at 2,500 characters for each page. Please double-check the information you enter and make sure everything is captured.

Program Data (1/2)

Program Data

Select the data you will be reporting: *

● Student and Graduate data ○ Student data only ○ New program: no student or graduate data

Would you like to import student, graduate, and training site data from your last application?* ❓

○ No ● Yes

1. The import data option defaults to "Yes".

- Data from your prior application will only import if you click "Yes" here, AND used the magnifying glass search function on the "Program Information" page to select the "Training Program Title".

- If you did not apply in 2021, select "No" to the import question. In this case, add all training site, student, and graduate data one by one on the appropriate page.

Program Data (2/2)

Instructions: Enter data in each field for the graduating class for each academic year shown as applicable. If no data exists for one of the academic years, enter a zero (0) in each field for that year.

	2020/2021 Academic Year	2019/2020 Academic Year
Total Enrollment Capacity *	200	200
1st Year Slots Available*	150	150
2nd Year Slots Available*	50	50
Qualified Student Applicants *	200	200
Students Accepted *	190	190
Students Enrolled *	180	180
2nd Year Graduates*	140	140

1. The number of students and graduates you enter here must match the corresponding number you entered on the "Student Data" and "Graduate Data" pages.

2. After completing this page, click "Save & Next".

Training Sites: Imported Sites

1. You must include all training sites used in academic year 21-22 on your application.

2. If you selected "Yes" to import prior year's data on the "Program Data" page, imported training sites display on the errors list here.

3. All imported training site records must be reviewed by selecting "Edit" from the drop-down list here.

4. Open each record and input required data (if needed) in order to move the record to the non-errors list.

Training Sites: New Sites

1. To add a new training site, click "Add a Site".
2. A new window will open.
3. Enter all required information.

Training Sites: Facility Type

- For each site you must identify the Facility Type.
- Verify the following facility types using the links under "More Information":
  - Community Health Centers
  - Disproportionate Share Hospital
  - FQHC's
  - FQHC Look-a-Likes
  - Government Owned Facilities
  - Indian Health Services Clinics
  - Rural Hospitals
  - Teaching Hospitals

Training Sites: Payer Mix

1. Enter the payer mix of each site for the timeframe listed in the application.

2. Payer mix does not have to total to 100% across all three fields here.

3. After completing each site record, click "Yes" under Training Site Reviewed, to confirm the accuracy of the record.

4. Click the "Submit" button.

Program Funding and Expenditures

1. Complete all required fields.
2. You must enter your actual budget figures here.
3. "Total" training program expenditures must be equal to or greater than the "Max Funding" amount for your program.
4. After completing this page, click "Save & Next".

Student Data: Review Imported Students
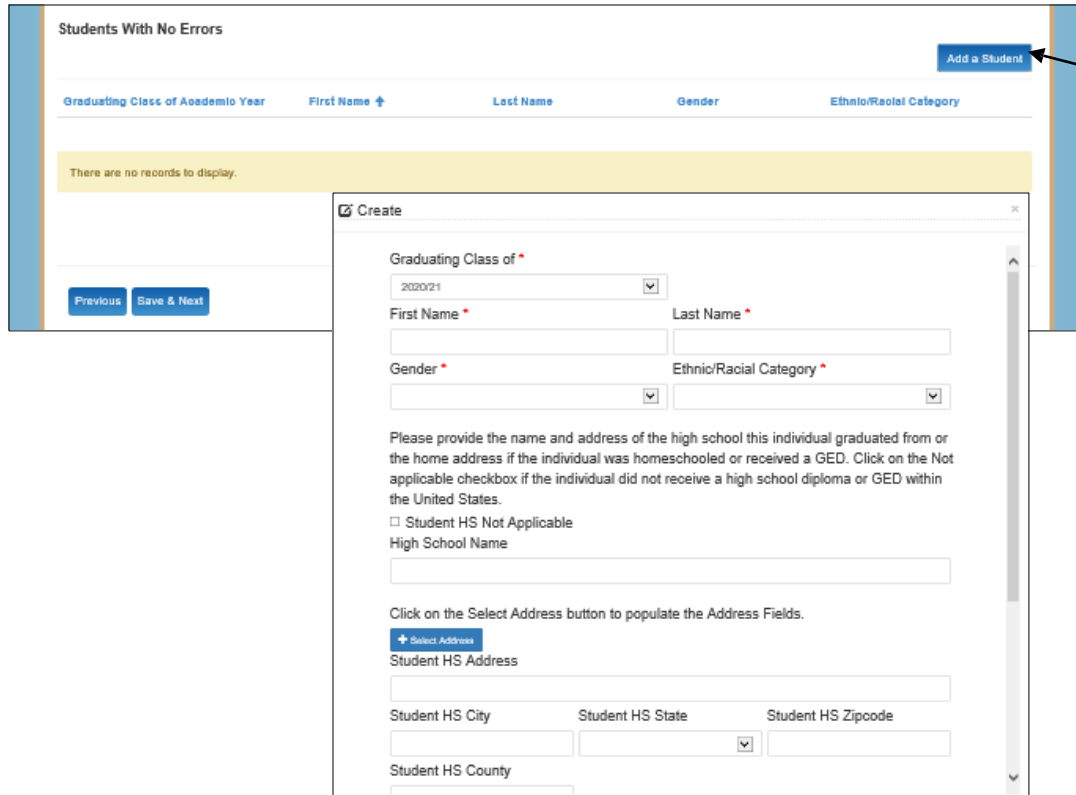
1. Include all current students with a projected graduation in Academic Year (AY) 22/23 and AY 23/24.

2. If you selected "Yes" to import prior year's data on the "Program Data" page, imported student records display on the errors list.

3. To review records, select "Edit" from the arrow dropdown to open the record window.

4. Verify all information for each record on your errors list. Enter any additional information as required. The system will move a record to the non-errors list after this step.

Note: NPI numbers and Practice Specialty are optional for students. Ensure only valid information is listed and errors are resolved. Records on the errors list after application submission may not be considered for scoring.

Student Data: Add New Students

- To add a new student, click the "Add a Student" button.
- A new window will open.
- Complete all required fields.

Note: Provide the home address for all students that were homeschooled or received a General Educational Development certification.

Student Data: Review New Students

1. To review, edit or delete a new student, select the arrow drop down list for that line.
2. After completing this step, click "Save & Next".

Note: You must ensure only valid student information is listed and data issues are resolved. Students remaining on the errors list after application submission may not be considered for scoring.

Graduate Data: Review Imported Graduates

1. You must include all AY 19/20 and AY 20/21 graduates in your application.

2. If you selected "Yes" to import prior year's data on the "Program Data" page, imported graduate records display on the errors list.

3. To review records, select "Edit" from the arrow dropdown to open the record window.

4. Verify all information for each record on your errors list. Enter any additional information as required. The system will move a record to the non-errors list after this step.

Note: Ensure only valid information is listed and errors are resolved. Records on the errors list after application submission may not be considered for scoring.

Graduate Data: Add New Graduates

- To add a new graduate, click the "Add a Graduate" button.
- A new window will open.
- Complete all required fields.

Graduate Data: Review New Graduates

Application SBFNPPA-0001348 – Song-Brown Family Nurse Practitioner/Physician Assistants

1. To review, edit, or delete a new graduates select the arrow dropdown list for that line.
2. After completing this step, click "Save & Next".

Note: You must ensure only valid graduate information is listed and data issues are resolved. Graduates remaining on the errors list after application submission may not be considered for scoring.

Graduate Data: Practice Site Information

1. You must add practice site information for all graduates.

2. If your graduate is working in California and you know their practice site:
   - Select "Yes" under "Do you know the graduate's practice site?"
   - Enter the practice site name.
   - If the practice site is not listed, select "Practice Site not Listed" and enter the practice site name.

3. For each site you must identify the Facility Type. Verify the facility types using the links under "More Information".

Graduate Data: Out of State Graduates

If your graduate is working outside of California:

- Select "No" as your response regardless if you know the practice site name and address.
- Select "Out of State" under "Reason Practice Site Unknown."

Common Application Errors

1. **Incorrect Signatory**: Provided incorrect signatories for the Grant Agreement and/or Std 204 Payee Data Record. Verify with your finance or contracts office before submitting the application to ensure this information is correct or the agreement may be delayed.

2. **Incorrect or Missing Required Documents**: Ensure you have attached all required documents. Failure to attach all required documents, or submitting incorrect documents, is cause for ineligibility.

3. **Wrong Facility Type**: Ensure you verify the correct facility type using the links in the application. Incorrect facility types may impact scoring.

4. **Outdated Remit To Address**: Verify with your finance office that there has been no change to the remit to address. If there is an outdated address, you may experience lost or delayed payments.

Common Data Import Errors

1. **Wrong Training Program Name**: Entered a new Training Program Title for an existing program. The proper course of action is to use the search function to select the exact Training Program Title used in the prior application, or the data import feature will not work. Contact Song-Brown staff if you need the training program named used last year.

2. **Missing Data**: Did not include all training site, student and/or graduate data. Data import must be verified, new data must be entered, and all data must be verified prior to submitting.

3. **Inconsistent Data:** Data entered is inconsistent with the prior application. Ensure reporting method consistency by comparing the current application to the prior application.

Required Documents

Before Attaching Documents:

After Attaching Documents:

- The red button on this page indicates required documents.
- For example, click on the "Approval Letter Upload" button to upload the required letter.
- Once you upload all required documents, the buttons turn green signifying that you may continue.
- Ensure your document upload is titled to begin with "Appr_" for the system to accept the document.
- Combined FNP/PA program will have to submit accreditation letters for both programs to continue.
- Click "Save & Next" to save continue to the final page of the application.

Note: You may delete an uploaded document by clicking the down-arrow button next to the desired entry.

Assurances

Application SBFNPPA-1000589 – Song-Brown Family Nurse Practitioner/Physician Assistants

100%

Assurances

I certify that the information contained herein is true and the most current information available at time of application submission.
☑ I Certify

You are about to submit your application. You may not edit or delete your application from the system after submission.

Previous   Submit

1. Read the certify statement.
2. Agree to the statement by checking the "I Certify" box.
3. Click the "Submit" button.
4. Upon submission you will no longer be able to edit your application.
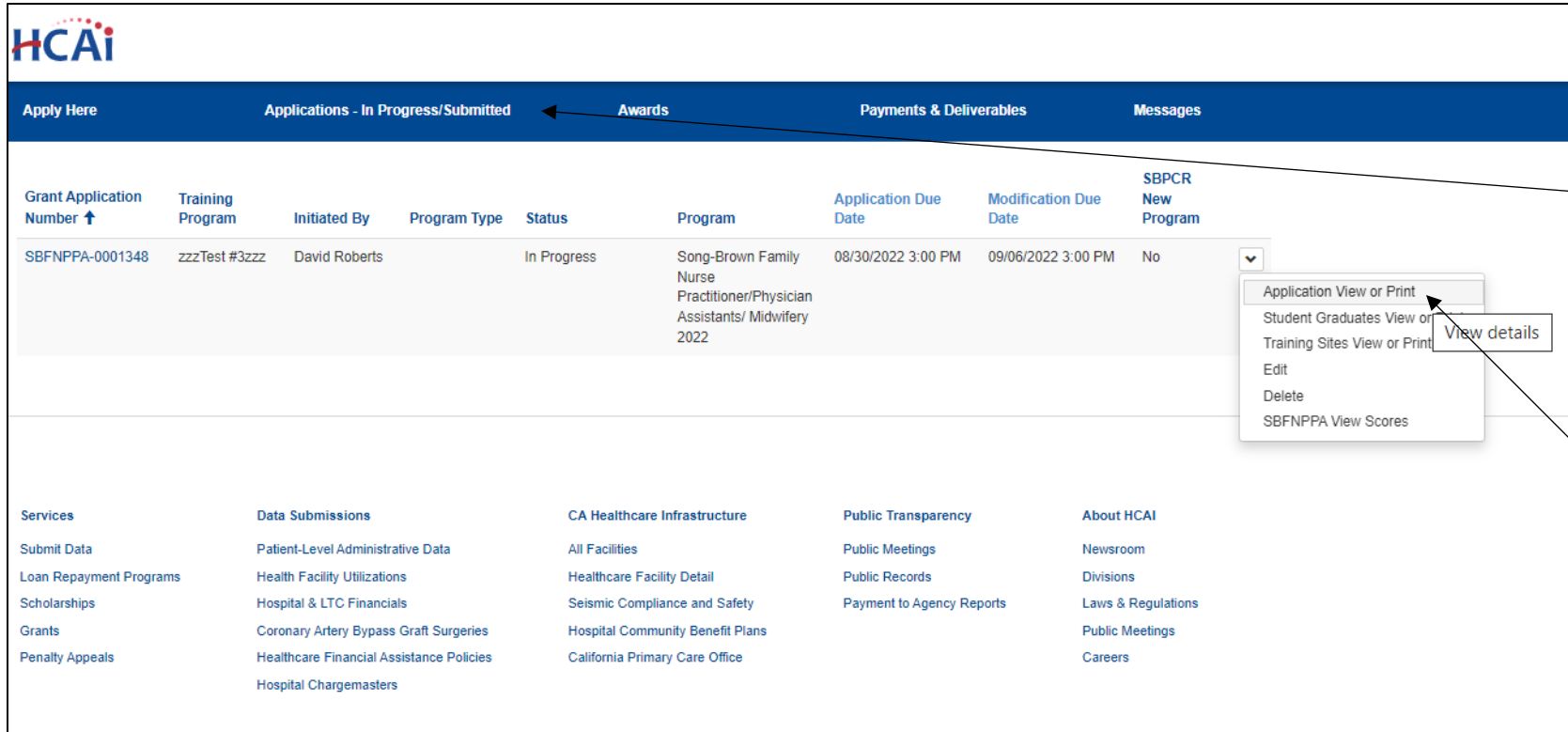
Note: Only Program Directors may submit an application. The "Submit" button will not appear for Grant Preparers.

Submission Complete

Application SBFNPPA-1000585 – Song-Brown Family Nurse Practitioner/Physician Assistants

Thank you for submitting your application. Your application has been received and will be reviewed. Return to your **dashboard**.
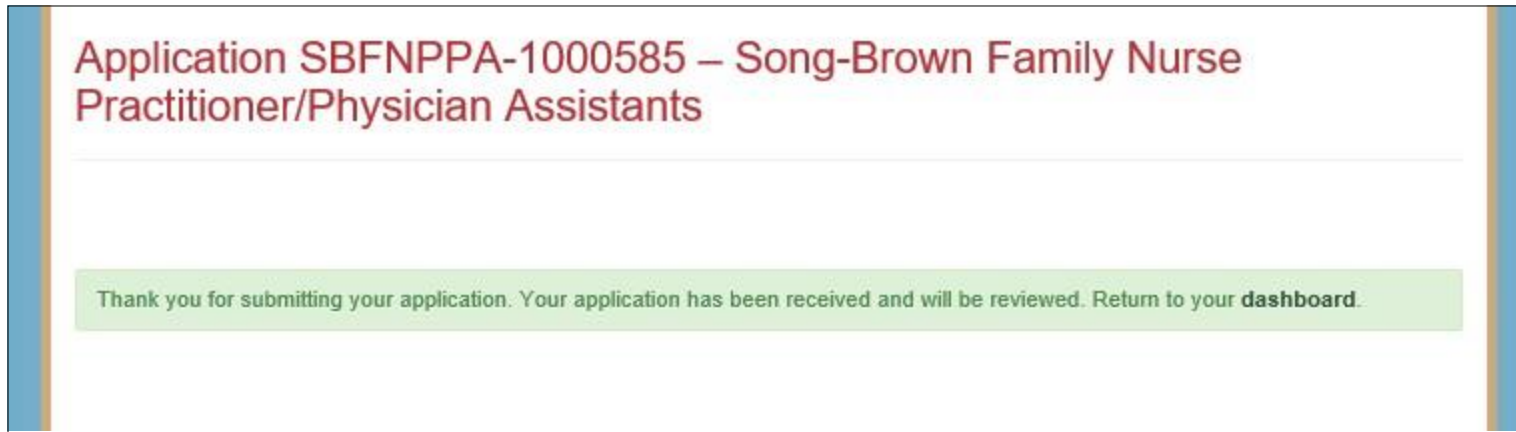
1. Once your application is submitted, you will see the message in green below.
2. You may navigate to your eApp dashboard by following the dashboard link in the message.

View and Print Application

- To view or print your application, click "Applications In Progress/Submitted" tab
- Select the arrow dropdown on the application you want to view or print.

DocuSign Instructions

- You must confirm your signatories with your contracting office BEFORE submitting your application to avoid delays with agreement execution.

- Agreements will be routed for signature through DocuSign email, based on the Grant Agreement Signatory and Payee Data Record 204 Signatory contacts provided on your application.

- DocuSign emails must be sent directly to the Agreement Signatory and Payee Data Signatory email addresses, EX: JaneSmith@ucx.edu. Do not provide a shared email address such as provost@ucx.edu or contracts@ucx.edu.

- Signatories should check their spam/junk folder if they can't find their DocuSign email as some systems may flag those emails as spam.

- Signatories cannot edit any documents in DocuSign, they can only sign off on them. NO edits are allowed. To receive a grant, you must accept all agreement terms as provided.

DocuSign Instructions, Continued

- Each signatory, as designated on the application, will receive a DocuSign email specific to their role.

- Only the designated signatory can open the DocuSign email, otherwise the link may become invalid.

- No one can be CC'ed on the DocuSign emails, however designated signatories can download a copy of what they sign.

- DocuSign links expire within 30 days. Review the agreement template in the Grant Guide on the SB web page before receiving the DocuSign to expedite your review and signing process.

Questions?

- Email us at SongBrown@hcai.ca.gov

- Email subject line must include the application number and program name.