

Division of Student Loans and Scholarships (DSL)

Loans – Annual Operating Reports

Health Professions Student Loans (HPSL)

Primary Care Loans (PCL)

Loans for Disadvantaged Students (LDS)

Nursing Student Loans (NSL)

User Guide for Grantees

June 2014

Table of Contents

1	INTRODUCTION	6
2	GETTING STARTED.....	6
2.1	What Is the AOR Performance Report and Who Must Submit One?	6
2.2	When Will the Report be Available?.....	6
2.3	What Are the Deadlines?	6
3	ACCESSING THE REPORT.....	7
3.1	EHB Roles and Privileges	7
3.1.1	Adding the Grant to Your Portfolio	7
3.1.2	Granting Privileges.....	10
3.2	Completing the Loans AOR Performance Report(s)	13
3.3	The Performance Report on the Submission List Page	14
3.4	Beginning the Report	16
4	COMPLETING THE LOANS AOR PERFORMANCE REPORT.....	17
4.1	Navigation and Data Entry	17
4.2	Status Overview Page.....	18
4.3	Page 1a - Student Borrower Data Section	20
4.3.1	Page 1a, the Student Borrower Data Section	20
4.3.2	Student Borrower Data Section – PCL Loans AOR.....	20
4.3.3	Student Borrower Data Section – Non PCL Loans AOR (LDS, HPSL and NSL).....	22
4.3.4	Page 1A Important Information.....	23
4.4	Page 1b – Student Race/Ethnicity Data Section	34
4.5	Page 2 – Program Account Section	38
4.6	Page 3 – Program Accounts Section.....	40
4.7	Page 4 – Excess Cash Worksheet	41

4.8	Page 5 – Program Accounts Section.....	42
4.9	Page 6a – Borrower Accounts Worksheet.....	43
4.10	Page 6b – Borrower Accounts Worksheet (continued).....	44
4.11	Page 6c – Borrower Accounts Worksheet (continued).....	45
4.12	Page 6 Template	46
5	REVIEWING AND SUBMITTING THE REPORT	48
5.1	Data Audit and Warning Page	48
5.2	Review Page.....	49
5.3	Submit to HRSA.....	50
6	HELP AND SUPPORT.....	52
7	APPENDIX.....	53
7.1	Rules for Completing AOR for Closing Schools	53

List of Tables

Table 1: Access Privileges	7
Table 2: Report Status Details	15
Table 3: Submission Status Values	15
Table 4: Report Section Status.....	18

List of Figures

Figure 1: Annual Operating Report on Submissions - List Page.....	6
Figure 2: Grants Tab	8
Figure 3: Add Grant to Portfolio link “My Grant Portfolio – List” page	8
Figure 4: Registering as PD to the Grant	9
Figure 5: Register as Project Director – Select Grant Page	9

Figure 6: Register as Project Director – Required Information from NoA 10

Figure 7: Managing User Access..... 11

Figure 8: Managing User Access..... 11

Figure 9: Approving Grant Access for Users 12

Figure 10: Loans AOR on “Submissions – Incomplete List” Page..... 13

Figure 11: Pending Loans Annual Operating Report..... 14

Figure 12: Status Details of the Loan AOR 14

Figure 13: Loans AOR Report Window 16

Figure 14: AOR Performance Report Side Menu 17

Figure 15: Status Overview 18

Figure 16: Page 1a – PCL Loans AOR 20

Figure 17: Page 1a – NON PCL Loans AOR..... 22

Figure 18: Page 1b – Student Race/Ethnicity Data Section (Sub-question 1) 34

Figure 19: Page 1b – Student Race/Ethnicity Data Section (Sub-question 2) 35

Figure 20: Page 1b – Student Race/Ethnicity Data Section (Sub-question 3) 35

Figure 21: Page 1b – Student Race/Ethnicity Data Section (Sub-question 4) 36

Figure 22: Page 2 – Program Account Section..... 38

Figure 23: Page 3 – Program Account Section (Continued)..... 40

Figure 24: Page 4 – Excess Cash Worksheet..... 41

Figure 25: Page 5 – Program Account Section (Continued)..... 42

Figure 26: Page 6a – Borrower Accounts Worksheet..... 43

Figure 27: Page 6b – Borrower Accounts Worksheet (continued) 44

Figure 28: Page 6c – Borrower Accounts Worksheet (continued)..... 45

Figure 29: Page 6 Template 47

Figure 30: Data Audit and Warning Page 48

Figure 31: Review Page 49

Figure 32: Submit Page..... 50

Figure 33: Loan AOR Certification Page..... 51

Figure 34: Submission Result Page 51

1 Introduction

The purpose of this document is to provide detailed assistance for accessing, completing and submitting Annual Operating Reports (AOR) for programs at your institution. Completing and submitting the AOR will be done through the HRSA Electronic Handbooks (EHBs).

This document is not a substitute for Program Information Notices (PINs) or Program Assistance Letters (PALs).

2 Getting Started

2.1 What Is the AOR Performance Report and Who Must Submit One?

The Loans Annual Operating Report (AOR) is a performance report that collects financial data pertaining to its loan programs for students and graduates in the health professions. These programs include: Health Professions Student Loans (**HPSL**), Primary Care Loans (**PCL**), Loans for Disadvantaged Students (**LDS**) and Nursing Student Loans (**NSL**). One AOR is required to be submitted for each participating school per discipline.

2.2 When Will the Report be Available?

HRSA will make the first Loans AOR Performance Report available in the HRSA Electronic Handbooks (EHBs) at the beginning of July every year, for the reporting period ending June 30 of the previous reporting period.

Figure 1: Annual Operating Report on Submissions - List Page

Due In	Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Status	Options
All		All	All					All	
▲ Due: In more than 30 Days (6)									
61 Days	Loans Annual Operating Report	Performance Reports		E11HP	AORE11	07/01/2013 - 06/30/2014	08/16/2014	Not Started	Start
Submission Cycle : Academic Year			Available Date : 6/10/2014			Extension Requested: No			
Extension Approval Status : N/A			Program Specific Status : Not Started			Last Updated By :			
Last Updated On : N/A									

2.3 What Are the Deadlines?

Effective 2013 this report will be available on July 1st. The report is due on August 15th of this year.

3 Accessing the Report

3.1 EHB Roles and Privileges

In order to access, work on and submit the Loans AORs, you must be a registered user within the EHBs, with appropriate roles and privileges. Every EHBs user has the organization-level role of “Authorizing Official” (AO), “Business Official” (BO) or “Other.” You choose that role when you create your EHBs account. To work on submissions for a grant, you must also have the grant-level role of “Project Director” (PD) or “Other” for that grant. In the case of Loans AOR, you must have the “Project Director” or “Other” role for the Program (HPSL, PCL, LDS or NSL) grant and you must have one or more of the privileges in Table 1: Access Privileges.

The Project Director automatically has all privileges associated with the grant, including the privilege to view, edit and submit AORs. He or she may grant these privileges (as well as others) to any user who requests them.

The privileges you have determine what you can do. You may have any or all of the view, edit and submit privileges at the grant level. The following table summarizes the permissions associated with each privilege within the EHBs.

Table 1: Access Privileges

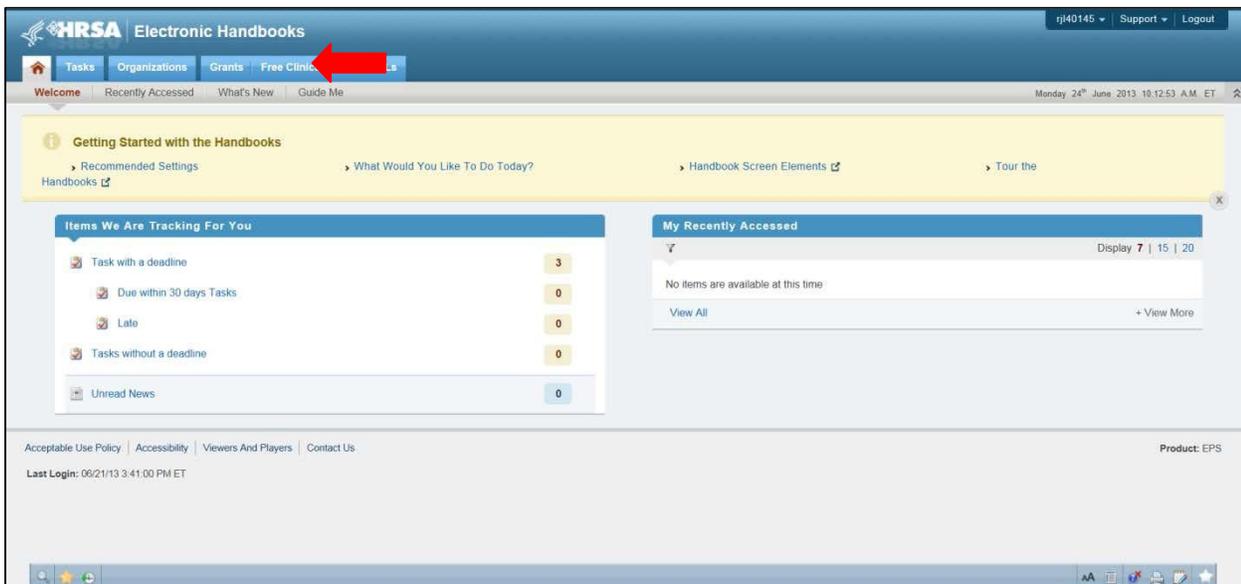
Privilege	Permissions
View performance report	<ul style="list-style-type: none"> ✓ Access the read-only version of the performance report ✓ Access the read-only versions of the reports submitted for all previous years
Edit performance report	All permissions associated with the “View” privilege, plus <ul style="list-style-type: none"> ✓ Enter and save the data in the electronic forms for all sections of the report
Submit performance report	All permissions associated with the “Edit” privilege, plus <ul style="list-style-type: none"> ✓ Submit the report once the data has been entered

3.1.1 Adding the Grant to Your Portfolio

All users (including the Project Director) who need to work on the AORs should ensure that the program specific grant has been added to their portfolio. If you are the Project Director, you can follow these steps to add the grant:

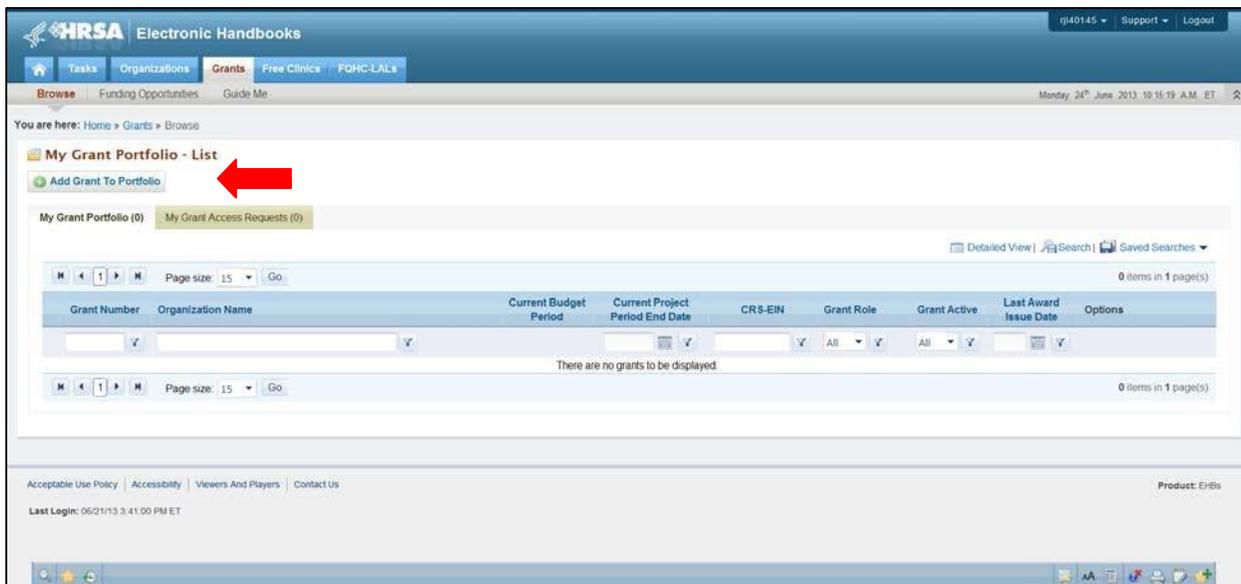
1. Click the Grants tab in the Top Navigation panel on the Welcome page (Figure 2).

Figure 2: Grants Tab



2. If the grant is not listed, click the [Add Grant to Portfolio](#) link (Figure 3).

Figure 3: Add Grant to Portfolio link “My Grant Portfolio – List” page



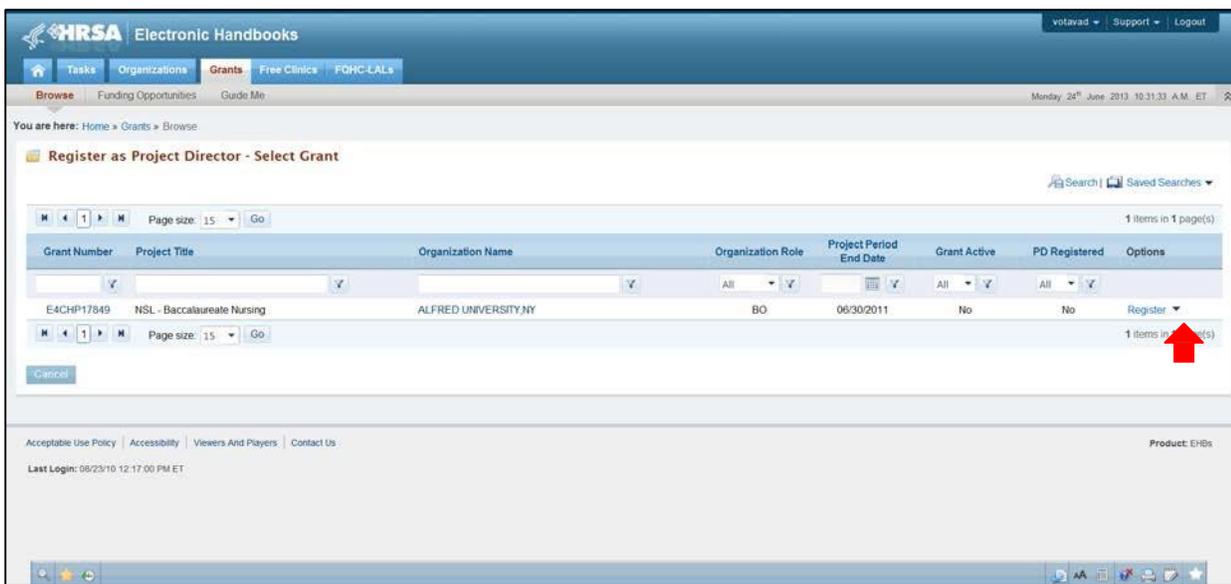
3. Choose “Register as Project Director (PD),” and then click the “**Continue**” button (Figure 4).

Figure 4: Registering as PD to the Grant



4. Locate the Grant you need to register to and click **“Register”**.

Figure 5: Register as Project Director – Select Grant Page



Starting from academic year 2009 - 2010, all organizations that receive new awards for the loans program will receive Notice of Award (NoA) generated from the HRSA EHBs. For subsequent academic years, these organizations will receive NoA regardless of whether the organization has received funds or not. Please enter the core grant number (Box 4b on the NoA) that you received for your program for this reporting academic year. If you have never received the HRSA EHBs generated NoA, the core grant number and other important information have been emailed to you. If you have not received an email please contact BHW staff immediately.

Figure 6: Register as Project Director – Required Information from NoA

You are here: Home » Grants » Browse

Register as Project Director

▼ E4CHP17849: NSL - Baccalaureate Nursing Status: Registered To Grant

Project Director on NoA: Debra Volava Project Director Email on NoA: teilesler1@hotmail.com
 Organization: ALFRED UNIVERSITY, ALFRED, NY Project Director Phone on NoA: (607) 871-2913

Name Validation Status		
Project Director Name on NoA	Project Director Name on Profile	Status
Debra Volava	Debra Volava	Validated

Fields with * are required

Enter the following information from NoA

* Issue Date for 8 E4CHP17849-01-00 (Item 1 on NoA) (mm/dd/yyyy)

* CRS-EIN for 8 E4CHP17849-01-00 (Item 18 on NoA) (e.g. 1999999999999 or X)

Enter the level of access you want for the Financial Report

Financial Report Access: View Financial Report Edit Financial Report

Certification

* I, Debra Volava, certify that I am the Project Director for grant.

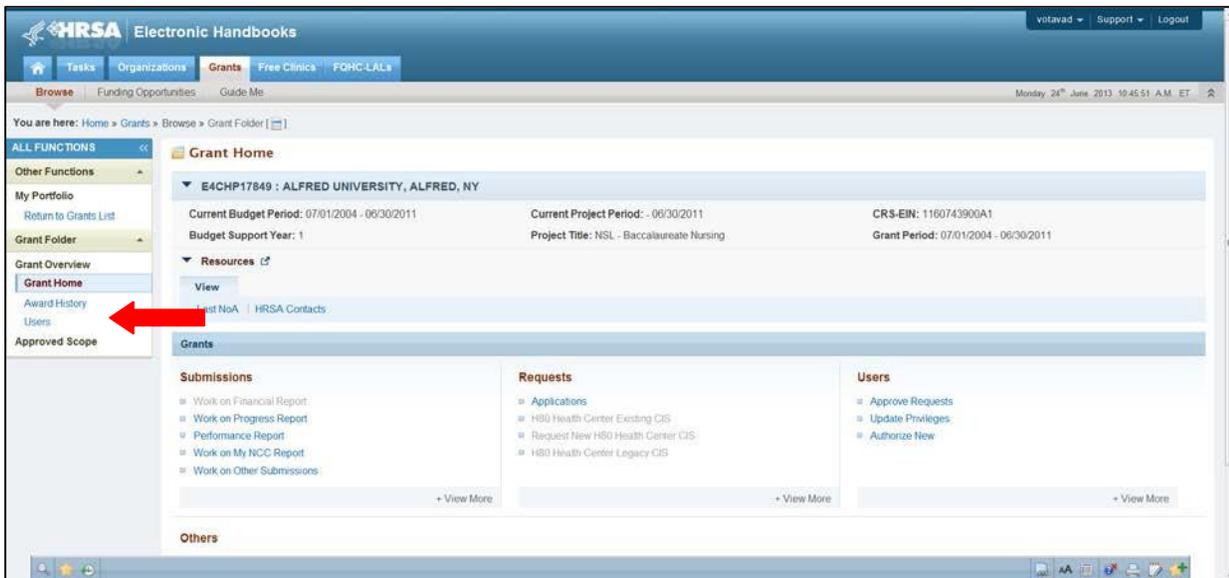
5. With the correct information entered the user will select “Save and Continue” to successfully register as the PD. The PD will then be given immediate access to the grant. Others are given access and privileges when the PD approves their request.

3.1.2 Granting Privileges

Once the Project Director has added the grant to his or her portfolio, he or she may take the following steps to grant other users permission to access and work with performance reports for the BHW grant:

1. Log into the HRSA EHBS (if necessary).
2. Click the Grant tab at the top of the page.
3. On the “My Grant Portfolio – List” page, click the Grant Folder link for your program specific grant.
4. The Grant Home page opens. In the left navigation menu click “Users”.

Figure 7: Managing User Access



5. A list of users who are registered to the organization that is associated with your grant will appear.

Figure 8: Managing User Access



6. All users registered to the organization appear. For any user, the PD has the ability to **Update** user privileges as needed.
7. Choose the appropriate access permissions for the user and confirm. (On subsequent screens not shown). For the Loan Annual Operating Report the required access includes:
 - Edit Performance Report
 - View Performance Report
 - Submit Performance Report

This process is not shown in detail.

Figure 9: Approving Grant Access for Users

Grant Access Request - Approve Confirm

Confirmation:
This is a confirmation page! You MUST click the appropriate button to proceed.

▶ E4CHP14966 : BIOLA UNIVERSITY, LA MIRADA, CA

▶ Resources ⓘ

▶ Gordon Hummel Grant Role: Other

▼ Current Privileges
Access Grant

▼ List of Privileges Granted
Access Grant
View Performance Report
Edit Performance Report
Submit Performance Report

▼ List of Privileges Revoked

3.2 Completing the Loans AOR Performance Report(s)

If you are already a registered user with the HRSA EHBs, and you have appropriate permissions, you can follow these steps to get started:

1. Type the link to the EHBs, in the address bar of your browser: <https://grants.hrsa.gov/webexternal/Login.asp>
2. Log into the EHBs.
3. On the top menu, click the Tasks tab.
4. In the left side menu, click Submissions for the list of pending grant related reports.
5. The “Submissions – Incomplete List” page opens. Locate the pending Loans Annual Operating Report for your grant (Figure 10).

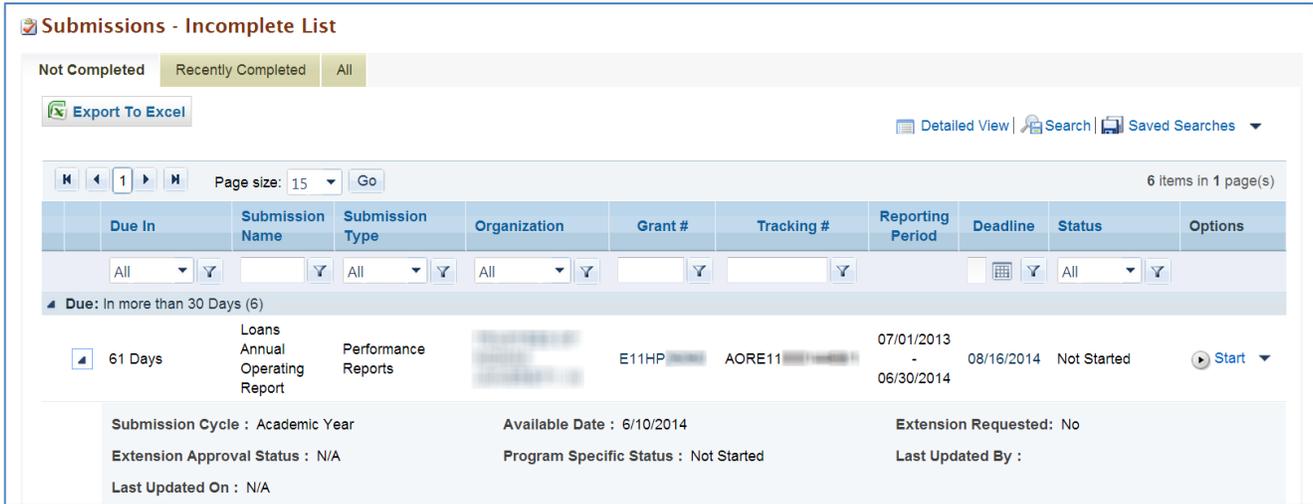
Figure 10: Loans AOR on “Submissions – Incomplete List” Page

The screenshot displays the 'Submissions - Incomplete List' page within the HRSA Electronic Handbooks interface. The page features a navigation menu on the left with categories like 'ALL TASKS', 'Grants', 'Requests', 'Submissions', and 'User Access Requests'. The main content area shows a table of submissions. The table has the following columns: Due In, Submission Name, Submission Type, Organization, Grant #, Tracking #, Reporting Period, Deadline, Status, and Options. A single submission is listed: 'Loans Annual Operating Report' (Submission Name), 'Performance Reports' (Submission Type), 'UNIVERSITY OF MICHIGAN HEALTHCARE' (Organization), 'AORE36' (Grant #), '07/01/2013 - 06/30/2014' (Reporting Period), '08/16/2014' (Deadline), and 'Not Started' (Status). Below the table, there are details for the submission, including 'Submission Cycle: Academic Year', 'Extension Approval Status: N/A', 'Last Updated On: N/A', 'Available Date: 6/10/2014', 'Program Specific Status: Not Started', and 'Extension Requested: No'. The page also includes an 'Export To Excel' button and a 'Detailed View' option.

3.3 The Performance Report on the Submission List Page

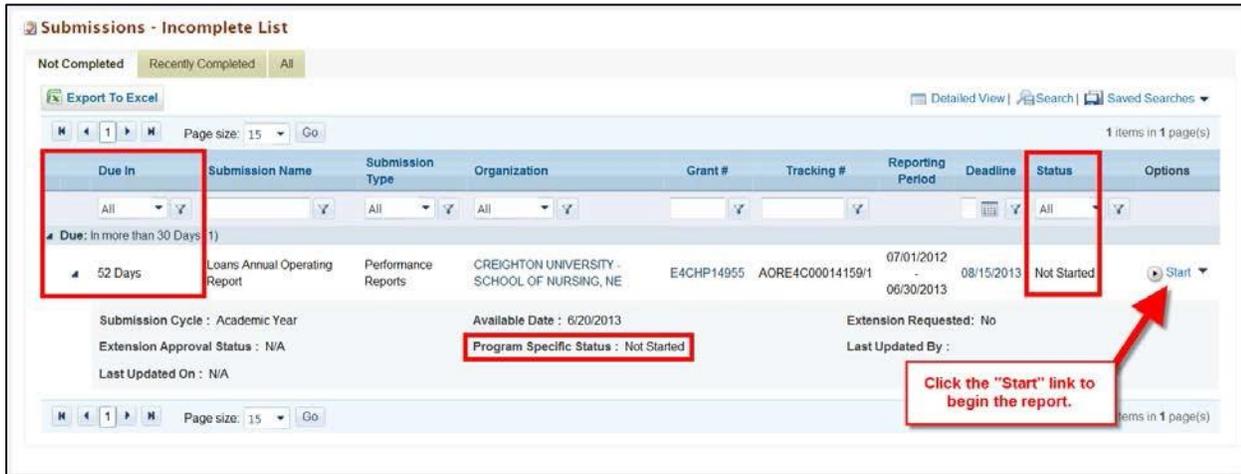
The basic details of the Loan AOR Performance Report are found on the Submission List page (Figure 11).

Figure 11: Pending Loans Annual Operating Report



Three details on this page allow you to monitor the status of your report. They are the “Due In”, “Program Specific Status”, and “Status” columns (Figure 12).

Figure 12: Status Details of the Loan AOR



The column titled “Status” describes the states the report passes through during its lifecycle. Values for the Status are given in Table 2: Report Status Details.

Table 2: Report Status Details

Status	Details	Who Must Act?
Not Started	The report has never been worked on. When the new report is available in the grantee handbook its status will be “Not Started.”	Grantee
In Progress	The “Start Report” link has been clicked.	Grantee
Submitted	The report has been submitted to HRSA.	HRSA
Change Requested	After the report has been submitted, it is sent to a reviewer. If the reviewer determines that changes are needed, the report will be made available to the grantee again for changes. The schedule status will move to “Change Requested.” The report will stay in this status while it is being corrected. When the changes are made and the report is re- submitted, the schedule status will revert to “Submitted.”	Grantee

The Submission Status describes the status of the report while it is being prepared, reviewed, or revised, either originally or in response to a request for changes. Values for Submission Status are given in Table 3: Submission Status Values.

Table 3: Submission Status Values

Submission Status	Details
Not Started	Data entry for the initial submission of the report has not been started.
In Progress	Data entry for the initial submission of the report has been started.
Change Requested	The report was sent back for changes. You must make the needed changes and re-submit the report.
Submitted	The report has been submitted, either for the first time or following a change request.

3.4 Beginning the Report

To begin the report, click the “Start Report” link. To return to a report you have previously worked on, click the “Edit Report” link.

The “Edit Report” link replaces the “Start Report” link as soon as the report Status changes to “In Progress”.

The AOR will open in a separate window (Figure 13).

Figure 13: Loans AOR Report Window

Submissions - Incomplete List

Not Completed | Recently Completed | All

Export To Excel

Detailed View | Search | Saved Searches

Page size: 15 | Go

1 items in 1 page(s)

Due In	Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Status	Options
All		All	All					All	

Due: In more than 30 Days (1)

61 Days	Loans Annual Operating Report	Performance Reports	INDIANA UNIVERSITY OF BLOOMINGTON	AORE3600014466		07/01/2013 - 06/30/2014	08/16/2014	Not Started	Start
---------	-------------------------------	---------------------	-----------------------------------	----------------	--	-------------------------	------------	-------------	-------

STATUS OVERVIEW

Loans Annual Operating Report (07/01/2013 - 06/30/2014) (Hide Details) Schedule Status: **In Progress**

Available Date	6/10/2014	Due Date	8/16/2014 12:00:00 AM
Reporting Cycle	Academic Year	Reporting Period	07/01/2013 - 06/30/2014
Institution Status	Active	Submission Status	Submission In Progress
Started by	Philip Voorheis On 6/16/2014 9:51:58 AM	Last Updated By	Philip Voorheis On 6/16/2014 9:51:58 AM
Last Version Submitted by			
Submission Tracking Number	AORE3600014466/1	Project Period	7/1/2013 - 6/30/2014

View: Related NGAs | Last NGAs

Name	Username	External Organization Role	Grant Role	Privileges
Philip Voorheis	pvoorhel	Other	Program Director	- Edit Performance Report - Submit Performance Report - View Performance Report
Linda Dayhuff	ldayhuf@indiana.edu	Business Official, Employee	Other	- Edit Performance Report - Submit Performance Report - View Performance Report

Section	Status	Action
Basic Information	Not Started	Update
FINANCIAL DATA		
Page 1a - Student Borrower Data Section	Not Started	Update
Page 1b - Student Race/Ethnicity Data Section	Not Started	Update
Page 2 - Program Accounts Section	Not Started	Update
Page 3 - Program Accounts Section	Not Started	Update
Page 4 - Excess Cash Work Sheet Section	Not Started	Update
Page 5 - Program Accounts Section	Not Started	Update
Page 6a - Borrower Accounts Worksheet Section	Not Started	Update
Page 6b - Borrower Accounts Worksheet Section	Not Started	Update
Page 6c - Borrower Accounts Worksheet Section	Not Started	Update
Data Audit and Warning	Not Started	Update

4 Completing the Loans AOR Performance Report

4.1 Navigation and Data Entry

Navigation within the AOR reflects the conventions used within the EHBS. It is designed to facilitate data entry by streamlining the flow of pages. All the pages in the report can be accessed through the side menu of the handbook (Figure 14).

Figure 14: AOR Performance Report Side Menu

The screenshot shows the side menu on the left with options: Loans AOR, Overview, Status, Basic Information, Financial Data, Page 1a, Page 1b, Page 2, Page 3, Page 4, Page 5, Page 6a, Page 6b, Page 6c, Data Audit And Warning, Review and Submit, Review, and Submit. The main content area displays the 'STATUS OVERVIEW' for the Loans Annual Operating Report (07/01/2013 - 06/30/2014). The report is currently **INCOMPLETE**. Below this is a table of users with permissions and a table of report sections with their status and update links.

Loans Annual Operating Report (07/01/2013 - 06/30/2014) Hide Details				Schedule Status: In Progress
Available Date	6/10/2014	Due Date	8/16/2014 12:00:00 AM	
Reporting Cycle	Academic Year	Reporting Period	07/01/2013 - 06/30/2014	
Institution Status	Active	Submission Status	Submission In Progress	
Started by	Philip Voorheis On 6/16/2014 9:51:58 AM	Last Updated By	Philip Voorheis On 6/16/2014 9:51:58 AM	
Last Version Submitted by				
Submission Tracking Number	AORE3600014466/1	Project Period	7/1/2013 - 6/30/2014	
View: Related NGA Last NGA				

Users with Permissions on Loans Annual Operating Report				
Name	Username	External Organization Role	Grant Role	Privileges
Philip Voorheis	pvoorhei	Other	Program Director	- Edit Performance Report - Submit Performance Report - View Performance Report
Linda Dayhuff	ldayhuf@indiana.edu	Business Official, Employee	Other	- Edit Performance Report - Submit Performance Report - View Performance Report

Loans Annual Operating Report Status		
Section	Status	Action
Basic Information	Not Started	Update
FINANCIAL DATA		
Page 1a - Student Borrower Data Section	Not Started	Update
Page 1b - Student Race/Ethnicity Data Section	Not Started	Update
Page 2 - Program Accounts Section	Not Started	Update
Page 3 - Program Accounts Section	Not Started	Update
Page 4 - Excess Cash Work Sheet Section	Not Started	Update
Page 5 - Program Accounts Section	Not Started	Update
Page 6a - Borrower Accounts Worksheet Section	Not Started	Update
Page 6b - Borrower Accounts Worksheet Section	Not Started	Update
Page 6c - Borrower Accounts Worksheet Section	Not Started	Update
Data Audit and Warning	Not Started	Update

1. Click the **“UPDATE”** link to the Status Overview page for any page where you need to do data entry.
2. You may return to this page from anywhere in the AOR to jump or skip to another section of the AOR.

EHBS has a time-out feature (30 minutes of inactivity) to insure you do not lose data click **“Save”** or **“Save and Continue”** frequently.

Click the **“Save”** button to save your data and remain on the same page.

Click the **“Save and Continue”** button to save your data (even if page is incomplete) and proceed to the next page.

4.2 Status Overview Page

The Status Overview page (Figure 15) displays the completion status of each section of the program specific Loans AOR. This is the page that opens when you click the “**Start Report**” link or “**Edit Report**” link on the Performance Reports list page.

The AOR Report Status table on the Status Overview page lists the sections of the report. The completion status is displayed to the right. Click the “**Update**” link under Action to open a section for editing (Figure 15).

Figure 15: Status Overview

Loans AOR

Overview

► Status

Basic Information

Financial Data

Page 1a

Page 1b

Page 2

Page 3

Page 4

Page 5

Page 6a

Page 6b

Page 6c

Data Audit And Warning

Review and Submit

Review

Submit

The table below shows the status of the Loans Annual Operating Report. The report is currently **INCOMPLETE** and cannot be submitted in it's current state. Please review each page for error and make the appropriate corrections.

STATUS OVERVIEW			
Loans Annual Operating Report (07/01/2013 - 06/30/2014) (Hide Details)			Schedule Status: In Progress
Available Date	6/10/2014	Due Date	8/16/2014 12:00:00 AM
Reporting Cycle	Academic Year	Reporting Period	07/01/2013 - 06/30/2014
Institution Status	Active	Submission Status	Submission In Progress
Started by	Philip Voorheis On 6/16/2014 9:51:58 AM	Last Updated By	Philip Voorheis On 6/16/2014 9:51:58 AM
Last Version Submitted by			
Submission Tracking Number	AORE3600014466/1	Project Period	7/1/2013 - 6/30/2014
View: Related NGA Last NGA			

Users with Permissions on Loans Annual Operating Report				
Name	Username	External Organization Role	Grant Role	Privileges
Philip Voorheis	pvoorhei	Other	Program Director	- Edit Performance Report - Submit Performance Report - View Performance Report
Linda Dayhuff	ldayhuf@indiana.edu	Business Official, Employee	Other	- Edit Performance Report - Submit Performance Report - View Performance Report

Loans Annual Operating Report Status		
Section	Status	Action
Basic Information	Not Started	Update
FINANCIAL DATA		
Page 1a - Student Borrower Data Section	Not Started	Update
Page 1b - Student Race/Ethnicity Data Section	Not Started	Update
Page 2 - Program Accounts Section	Not Started	Update
Page 3 - Program Accounts Section	Not Started	Update
Page 4 - Excess Cash Work Sheet Section	Not Started	Update
Page 5 - Program Accounts Section	Not Started	Update
Page 6a - Borrower Accounts Worksheet Section	Not Started	Update
Page 6b - Borrower Accounts Worksheet Section	Not Started	Update
Page 6c - Borrower Accounts Worksheet Section	Not Started	Update
Data Audit and Warning	Not Started	Update

Completion statuses for report sections are listed and explained in **Table 4**.

Table 4: Report Section Status

Status	Denotes
Not Started	The page has not been accessed. All the forms are initially in the “Not Started” status. Accessing the page moves the status to “In Progress.”
In Progress	The form will remain in this status until all the data has been entered and has been saved. The data will be saved as long as there are no critical errors.
Complete	Once you have entered all the data within the form and there are no errors, the form status will be changed to “Complete.”

Loans – Annual Operating Report (AOR)

Page 18 of 53

User Guide for Grantees

You can update any section, even those marked “Complete.” Once a section has been marked “Complete,” making changes to the data which cause errors will change the section status back to “In Progress.” A section never reverts to the “Not Started” status.

4.3 Page 1a - Student Borrower Data Section

4.3.1 Page 1a, the Student Borrower Data Section

Answer all the questions in the Student Borrower Data section for students receiving funds through a BHW Loan program.

Access this page by clicking the “**Update**” link for Page 1a on the Status Overview page, or by choosing Page 1a from the left side menu.

Information explaining how to complete an AOR for a closing school can be found in Appendix 7.1.

For specific questions on any portion of the Loans AOR please refer to the Loans AOR Guidance document. This can be accessed from the Performance Reports list page.

4.3.2 Student Borrower Data Section – PCL Loans AOR

1. Answer all the questions in the Student Borrower Data section for a PCL Loan program (Figure 16).

Figure 16: Page 1a – PCL Loans AOR

PAGE 1A - STUDENT BORROWER DATA SECTION			Status: Not Started
Student/Graduate Data	Cumulative (Includes current year)	Current Year (7/1/2013-6/30/2014)	
*1A-1. Number of Loans for the Allopathic Medicine discipline	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
*1A-2. Total Dollar Amount of Loans Awarded for the Allopathic Medicine discipline	<input type="checkbox"/>	\$ <input type="text"/>	\$ <input type="text"/> (New Only)
*1A-3. Total Full-Time Enrollment for the Allopathic Medicine discipline for the academic year (both non-PCL and PCL recipients)		<input type="text"/>	<input type="text"/>
*1A-4a. Total Number of Defaulted Loans (HSPL -Allopathic Medicine and PCL -Allopathic Medicine)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
*1A-4b. Of the total number of defaulted loans above in question 1A-4a, how many are PCLs?	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
*1A-4c. Of the total number of defaulted loans above in question 1A-4a, how many are HPSLs?	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
*1A-5. Total Original Defaulted Principal Loaned for the Allopathic Medicine discipline		\$ <input type="text"/>	\$ <input type="text"/>
1A-6a. Total Number of Students (PCL recipients and non-recipients) who dropped out of the Allopathic Medicine discipline		<input type="text"/>	<input type="text"/>
1A-6b. Of the number above how many of them were PCL student borrowers		<input type="text"/>	<input type="text"/>
*1A-7. Total Number of Service Defaulted Borrowers for the Allopathic Medicine discipline (Individuals not number of loans)		<input type="text"/>	<input type="text"/> (To provide # of borrowers by year, click here)
*1A-8a. Total Number of HPSL and PCL Borrowers for the Allopathic Medicine discipline		<input type="text"/> (Everyone who ever borrowed from school)	<input type="text"/>
*1A-8b. Of the total number of borrowers above in question 1A-8a, how many are PCL borrowers?		<input type="text"/>	<input type="text"/>
*1A-8c. Of the number of PCL borrowers for the Allopathic Medicine discipline above in 1A-8b, number of Active and Non Retired/Defaulted Borrowers		<input type="text"/>	<input type="text"/>
*1A-9. Total Number of PCL Students including those who graduated during the reporting period for the Allopathic Medicine discipline		<input type="text"/>	<input type="text"/> (To Provide age & gender details, click here)
*1A-10. Total Graduates (PCL-Allopathic Medicine Only)		<input type="text"/>	<input type="text"/>
1A-11. Number of PCL loan students including those who graduated during this reporting period that indicate an intention to serve in a medically underserved community.		<input type="text"/>	<input type="text"/>

1A-12. Number of PCL students and graduates during this reporting period from rural backgrounds.			<input type="text"/>
Current Year Graduate Special Data			Number of Graduates
1A-13. Total number of full time graduates during the current reporting period at your school.			<input type="text"/>
1A-13a. Of the total number in question 1A-13, how many are URM graduates.			<input type="text"/>
1A-13b. Of the total number in question 1A-13, how many are non-URM graduates.			<input type="text"/>
1A-14. Total number of full time PCL graduates during the current reporting period who indicate an intention to work in rural areas			<input type="text"/>
Prior Years Graduate Special Data (Note: Please leave blank if you do not have data)			Number of Graduates
1A-15a. Total Number of PCL - Allopathic Medicine Loan Recipients who graduated in academic year 2009-2010			<input type="text"/>
1A-15b. Of the Total Graduates reported in question 1A-15a, the Number of Full-Time PCL - Allopathic Medicine Graduates in academic year 2009-2010 serving in Medically Underserved Communities			<input type="text"/>
1A-15c. Of the Total Graduates reported in question 1A-15a, the Number of Full-Time PCL - Allopathic Medicine Graduates in academic year 2009-2010 serving in Primary Care			<input type="text"/>
1A-15d. Of the Total Graduates reported in question 1A-15a, the Number of PCL - Allopathic Medicine Graduates in academic year 2009-2010 serving in a Rural Area.			<input type="text"/>
Student/Graduate Data	Academic Year		Cumulative from 1993 to AY 2009 - 2010
	2008 - 2009 (1)	2009 - 2010 (2)	
*1A-16. Total Graduates (Allopathic Medicine Only)	<input type="text"/>	<input type="text"/>	<input type="text"/>
*1A-17. Of the number above, the number of Graduates in Primary Care Residencies & Practice	<input type="text"/>	<input type="text"/>	<input type="text"/>
1A-18. Percentage of Graduates in Primary Health Care	<input type="text"/> %	<input type="text"/> %	
1A-19. Percentage Change from Prior Year	<input type="text"/> %		

Go to Previous Page Save Save and Continue

*This figure is an example, the text on this page will change based on the program specific AOR you are completing.

2. Click the “**Save and Continue**” link to save the data and proceed to Page 1b.

See “Page 1a Important Information” Section 4.3.4 for help completing this page.

4.3.3 Student Borrower Data Section – Non PCL Loans AOR (LDS, HP SL and NSL)

1. Answer all the questions in the Student Borrower Data section for a NON PCL Loan program (Figure 17).

Figure 17: Page 1a – NON PCL Loans AOR

PAGE 1A - STUDENT BORROWER DATA SECTION			Status: Not Started
Student/Graduate Data	Cumulative (Includes current year)	Current Year (7/1/2013-6/30/2014)	
*1A-1. Number of Loans for the Nursing - Associate discipline	<input type="text"/>	<input type="text"/> (New Only)	
*1A-2. Total Dollar Amount of Loans Awarded for the Nursing - Associate discipline	\$ <input type="text"/>	\$ <input type="text"/>	
*1A-3. Total Full-time Enrollment and Half-time Enrollment for the Nursing - Associate discipline for the academic year (both non-NSL recipients and NSL recipients)	<input type="text"/>	<input type="text"/>	
*1A-4. Total number of Defaulted Loans for the Nursing - Associate discipline	<input type="text"/>	<input type="text"/>	
*1A-5. Total Original Defaulted Principal Loaned for the Nursing - Associate discipline	\$ <input type="text"/>	\$ <input type="text"/>	
1A-6a. Total Number of Students who dropped out of the Nursing - Associate discipline	<input type="text"/>	<input type="text"/>	
1A-6b. Total Number of Students who dropped out of the Nursing - Associate discipline who were NSL borrowers	<input type="text"/>	<input type="text"/>	
*1A-7a. Total Number of NSL Borrowers for the Nursing - Associate discipline	<input type="text"/> (Everyone who ever borrowed from school)	<input type="text"/> (First time recipients)	
*1A-7b. Of the number of NSL borrowers for the Nursing - Associate discipline above, number of Active and Non Retired/Defaulted Borrowers	<input type="text"/>	<input type="text"/>	
*1A-8. Total Number of NSL Students including those who graduated during the reporting period for the Nursing - Associate discipline	<input type="text"/>	<input type="text"/> (To provide age & gender details, click here .)	
*1A-9. Total Graduates (NSL-Nursing - Associate only)	<input type="text"/>	<input type="text"/>	
1A-10. Number of NSL students including those who graduated during this reporting period that indicate an intention to serve in a medically underserved community	<input type="text"/>	<input type="text"/>	
1A-11. Number of NSL students including those that graduated during this reporting period that indicate an intention to practice in primary care	<input type="text"/>	<input type="text"/>	
1A-12. Number of NSL students including those who graduated during this reporting period that are from rural backgrounds	<input type="text"/>	<input type="text"/>	
Current Year Graduate Special Data		Number of Graduates	
1A-13. Total number of full time graduates (NSL - Nursing - Associate loan recipients and Non-NSL - Nursing - Associate) at your school during the current reporting period.	<input type="text"/>	<input type="text"/>	
1A-13a. Of the total number in question 1A-13, how many are URM graduates.	<input type="text"/>	<input type="text"/>	
1A-13b. Of the total number in question 1A-13, how many are non-URM graduates.	<input type="text"/>	<input type="text"/>	
1A-14. Total number of full time NSL - Nursing - Associate graduates during the current reporting period who indicate intent to serve in a rural area	<input type="text"/>	<input type="text"/>	
Prior Years Graduate Special Data (Note: Please leave blank if you do not have data)		Number of Graduates	
1A-15a. Total Number of NSL - Nursing - Associate Loan Recipients who graduated in academic year 2012-2013	<input type="text"/>	<input type="text"/>	
1A-15b. Of the Total Graduates reported in question 1A-15a, the Number of Full-Time NSL - Nursing - Associate Graduates in academic year 2012-2013 serving in Medically Underserved Communities	<input type="text"/>	<input type="text"/>	
1A-15c. Of the Total Graduates reported in question 1A-15a, the Number of Full-Time NSL - Nursing - Associate Graduates in academic year 2012-2013 serving in Primary Care	<input type="text"/>	<input type="text"/>	
1A-15d. Of the Total Graduates reported in question 1A-15a, the Number of Full-Time NSL - Nursing - Associate Graduates in academic year 2012-2013 who entered the field for which they received the degree	<input type="text"/>	<input type="text"/>	
1A-15e. Of the Total Graduates in question 1A-15a, the Number of Full-Time NSL - Nursing - Associate Graduates in academic year 2012-2013 who entered service in a rural area.	<input type="text"/>	<input type="text"/>	

Go to Previous Page Save Save and Continue

*This figure is an example, the text on this page will change based on the program specific AOR you are completing.

2. Click the **“Save and Continue”** link to save the data and proceed to Page 1b.

See **“Page 1a Important Information”** (Section 4.3.4 below) for help completing this page.

4.3.4 Page 1A Important Information

1A-1. Number of Loans:

The Current Number of Loans represents the Number of New Loans awarded to students in the current reporting period. If the same student, who had already received loan award in a prior reporting period, is also receiving a new loan award in the current reporting period, this student should be counted under the Current Number of Loans.

The Cumulative Number of Loans represents the sum of all loans awarded in the previous reporting periods, since the beginning of the program including the current period.

1A-2. Total Dollar Amount of Loans Awarded for the <discipline name> discipline

The Current Total Dollar Amount of Loans Awarded should include the total dollar amount of all loans awarded for this program (authorized or committed but not necessarily disbursed) during the current reporting period.

The Cumulative Total Dollar Amount of Loans Awarded should include the total dollar amount of all loans awarded for this program (authorized or committed but not necessarily disbursed) in the previous reporting periods, since the beginning of the program including the current period.

1A-3. Total Full-Time Enrollment for the Discipline Reporting Program for the academic year

For HPSL, PCL, and LDS schools – This number should include all full-time students only (using your school’s definition for full-time) enrolled in the discipline program for which you are reporting.

For NSL schools – This number should include all full-time and at least half-time students (using your school’s definition for full and at least half-time) enrolled in the discipline program (associate, diploma, graduate and baccalaureate) for which you are reporting.

1A-4. (Applicable for non-PCL program only) Total Number of Defaulted Loans for the <discipline name> discipline

The Current Total Number of Defaulted Loans should represent the payment defaulted loans that became delinquent 120 days or more in the current reporting period. These loans may have been given out in the previous reporting periods or the current period. The recipient’s loan may have defaulted multiple times during the reporting period but count it only once during this period.

The Cumulative Total Number of Defaulted Loans should represent the payment defaulted loans that became delinquent 120 days or more since the beginning of the program including the current period.

1A-4a. (Applicable for PCL – Allopathic Medicine and Former HPSL – Allopathic Medicine) Total Number of Defaulted Loans

The Current Total Number of Defaulted Loans should represent the payment defaulted loans that became delinquent 120 days or more in the current reporting period. These loans may have been given out in the previous reporting periods or the current period.

The Cumulative Total Number of Defaulted Loans should represent the payment defaulted loans that became delinquent 120 days or more since the beginning of the program including the current period.

1A-4b. (Applicable for PCL Only—Do not include former allopathic or osteopathic HPSL data in this response)

Of the total number of defaulted loans above in question 1A-4a, how many are PCL's? - PCL AOR

For PCL Allopathic Medicine: Of the total number of payment defaulted loans that became delinquent 120 days or more during the current reporting period reported in 1A-4a, please indicate the PCL Allopathic Medicine loans made on or after July 1, 1993.

For PCL Osteopathic Medicine: Of the total number of payment defaulted loans that became delinquent 120 days or more during the current reporting period reported in 1A-4a, please indicate the PCL Osteopathic Medicine loans made on or after July 1, 1993.

1A-4c. (Applicable for former HPSL Allopathic and HPSL Osteopathic Only) Of the total number of defaulted loans above in 1A-4a, how many are HPSL's? - PCL AOR

For former HPSL Allopathic Medicine: Of the total number of payment defaulted loans that became delinquent 120 days or more during the current reporting period reported in 1A-4a, please indicate the HPSL Allopathic loans made before July 1, 1993.

For former HPSL Osteopathic Medicine: Of the total number of payment defaulted loans that became delinquent 120 days or more during the current reporting period reported in 1A-4a, please indicate the HPSL Osteopathic Medicine loans made before July 1, 1993.

1A-5. Total Original Defaulted Principal Loaned for the <Discipline Name> discipline

The Current Total Original Defaulted Principal Loaned should represent the original amount of principal loaned that was defaulted for this reporting period.

The Cumulative Total Original Defaulted Principal Loaned should represent the original amount of principal loaned was defaulted since the beginning of the program including the current period.

1A-6a. Total Number of Students dropped out this year for the <Discipline Name> discipline

This number should represent the total number of students (recipients and non-recipients) in the reporting discipline who dropped out from school in the current reporting period. Do not include temporary withdrawals.

1A-6b. Of the number above in 1A-6a, how many of them were <program name> student borrowers

This number should represent the total number of students in the reporting discipline who received loans from the program and dropped out from school in the current reporting period.

1A-7. (Applicable for PCL Only) Total Number of Service Defaulted Borrowers for the <Discipline Name> discipline

The Current Total Number of Service Defaulted Borrowers should represent the number of borrowers who defaulted on their service obligation in the current reporting period.

The Cumulative Total Number of Service Defaulted Borrowers should represent the number of borrowers who defaulted on their service obligation since the beginning of the program including the current period.

1A-7a. (Applicable for LDS, NSL and HPSL) Total Number of <program name> Borrowers for the <Discipline Name> discipline

The Current Total Number of Borrowers should represent the number of new individuals who received loans from the reporting program in the current reporting period but who never had received that program loan before.

The Cumulative Total Number of Borrowers should represent the number of individuals who ever received loans from the reporting program since the beginning of the program including the current reporting period.

1A-7b. (Applicable for LDS, NSL and HPSL) Of the number of <program name> borrowers for the <Discipline Name> above, number of Active and Not Retired/Defaulted Borrowers

This number should represent the cumulative number of borrowers since the beginning of the program including the current reporting period who have not retired or have not defaulted and are still paying back on their loans.

1A-8a. (Applicable for PCL and former allopathic and osteopathic HPSL) Total Number of PCL and allopathic and osteopathic HPSL Borrowers for the <Discipline Name> discipline

The Cumulative Total Number of the PCL and former allopathic and osteopathic HPSL Borrowers should represent the number of individuals who ever received allopathic and osteopathic HPSL and PCL loans since the beginning of the program including the current reporting period.

1A-8b. (Applicable for PCL) Of the number of borrowers above in question 1A-8a, how many are PCL borrowers with service requirements? (Do not include former osteopathic and allopathic HPSL borrowers unless they have a PCL with service requirement loan.)

The Cumulative Total Number of PCL Borrowers should represent the number of individuals who ever received PCL loans since the beginning of the program including the current reporting period.

The current number should reflect new PCL borrowers. This figure will be used to pre-populate 1A-8a current field as well.

1A-8c. (Applicable for PCL Only) Of the number of PCL borrowers for the <discipline name> discipline above in 1A-8b, number of Active and Not Retired/Defaulted Borrowers

This number should represent the cumulative number of borrowers since the beginning of the program including the current reporting period who have not retired or have not defaulted and still are paying back on their loans.

1A-8. (Applicable for LDS, NSL and HPSL) Total Number of <program name> students and graduates for the <Discipline Name> discipline

The Current Total Number of <program name> Students (including new graduates) represents the total number of students who participated in that loan program during the current reporting period. This number should include students who have received loans in the current year and the previous years and actively participated in the loan program during the current reporting period.

1A-9. (Applicable for PCL Only) Total Number of PCL Students including those who graduated during the reporting year.

The Current Total Number of PCL Students represents the total number of students (including new graduates) who participated in the PCL loan program during the reporting period. This number should include students who have received

loans in the current year and the previous years and actively participated in the loan program in the current reporting period.

1A-9. (Applicable for LDS, NSL and HPSL) Total Graduates for the Discipline Reporting Program

The current number should represent the total number of new graduates in the current reporting period who have participated in the reporting loan program for the discipline.

The cumulative field should represent the number of all program graduates since the beginning of the program.

1A-10. (Applicable for PCL Only) Total Graduates for the (PCL - <discipline name>)

The current number should represent the total number of new graduates in the current reporting period who have participated in the reporting loan program for the discipline. The cumulative field should be the number of all PCL graduates since the beginning of the program.

1A-10. (Applicable for LDS, NSL and HPSL) Number of <program name> students and graduates during this reporting period that indicate an intention to serve in a medically underserved community

The total number of program students and new graduates during this reporting period who intend to work in a medically underserved community after they graduate.

1A-11. (Applicable for PCL only) Number of PCL students including those who graduated during this reporting period that indicate an intention to serve in a medically underserved community

The total number of PCL program students and new graduates during this reporting period who intend to work in a medically underserved community after they graduate.

1A-11. (Applicable for LDS, NSL and HPSL) Number of <program name> students and graduates during this reporting period that indicate an intention to practice in primary care after they graduate.

The total number of program students and new graduates during this reporting period who intend to practice in primary care after they graduate.

The following is the list of disciplines categorized as Primary Care in HPSL, NSL and LDS:

PROGRAM	DISCIPLINE NAME
LDS	AllopathicMedicine
LDS	OsteopathicMedicine
LDS	Dentistry
HPSL	Dentistry
NSL	Nursing - Graduate

1A-12. (Applicable for HPL, NSL and LDS) Number of <program name> students and new graduates during this reporting period that are from rural backgrounds.

To determine whether the student's or graduate's work Census tract location is eligible, visit the webpage [Rural Health Grants Eligibility Advisor \(://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx\)](http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx) and enter your address.

1A-12. (Applicable for PCL only) Total number of full-time PCL students and new graduates during this reporting period from rural backgrounds.

To determine whether the student's and graduate's work Census tract is eligible, visit the webpage [Rural Health Grants Eligibility Advisor http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx](http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx) and enter the address.

1A-13a. (Applicable for NSL, LDS, HPSL and PCL) Of the total number in question 1A-13, how many are URM graduates.

The total number of underrepresented minorities (URM) at your school who graduated during this reporting period. Below is the URM definition:

Underrepresented minorities include any individual who is American Indian or Alaska Native, specific Asian populations, Black or African American, Hispanic or Latino, and Native Hawaiian or Other Pacific Islander. Definitions of these populations appear below:

- **American Indian or Alaska Native:** A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.
- **Underrepresented Asian:** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent other than Chinese, Filipino, Japanese, Korean, Asian Indian or Thai.
- **Black or African American:** A person having origins in any of the black racial groups of Africa.
- **Hispanic or Latino:** A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin without regard to race.
- **Native Hawaiian or Other Pacific Islander:** A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

1A-13b. (Applicable for NSL, LDS, HPSL and PCL) Of the total number in question 1A-13, how many are non-URM graduates.

The total number of graduates who are not underrepresented minorities (URM) at your school graduated during this reporting period.

1A-14. (Applicable for LDS, NSL, HPSL and PCL) Total number of full-time <program name> graduates during the current reporting year who indicate intent to serve in a rural area.

The total number of full-time graduates who during this reporting year who indicated an intent to serve in a rural area.

To determine whether the graduate's work Census tract location is eligible, visit the webpage [Rural Health Grants Eligibility Advisor \(://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx\)](http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx) and enter your address.

1A-15a. (Applicable for All Disciplines EXCEPT Allopathic and Osteopathic) Total Number of <program name> - <discipline name> Loan Recipients who graduated in academic year 2012-2013.

This number should represent the total number of program recipients who graduated in the prior year and who are participating in the reporting loan program for the discipline.

1A-15b. (Applicable for All Disciplines EXCEPT Allopathic and Osteopathic)

Of the Total Graduates reported in question 1A-15a, the Number of Full-time <program name>-<discipline name> Graduates in academic year 202-2013 serving in Medically Underserved Communities.

Enter total number of graduates in the current reporting period who are serving, or in residencies, in medically underserved communities. "Medically Underserved Communities" means any geographic area and/or population served by any of the following practice sites:

- Community Health Centers (section 330) Migrant Health Centers (section 329)
- Health Care for the Homeless Grantees (section 340) Public Housing Primary care Grantees (section 340A)
- Rural Health Clinics, federally designated (section 1861(aa)(2) of the Social Security Act)
- National Health Service Corps Sites, freestanding (section 333)
- Indian Health Service Sites (Pub. L. 93-638 for tribal operated sites and Pub.L.94-437 for IHS operated sites)
- Federally Qualified Health Centers (section 1905(a) and (1) of the Social Security Act)
- Primary Medical Care, Mental Health, and Dental Health Professional Shortage Areas (HPSAs) (designated under section 332)
- State or Local Health Departments (regardless of sponsor - for example, local health departments who are funded by the State would qualify)
- Ambulatory practice sites designated by State Governors as serving medically underserved communities
- Practices or facilities in which 50 percent or more of the patients are uninsured or Medicaid recipients.

1A-15c. (Applicable for All Disciplines EXCEPT Allopathic and Osteopathic) Of the Total Graduates reported in question 1A-15a, the Number of Full-Time <program name> - <discipline name> Graduates in academic year 2012-2013 serving in Primary Care

This question is applicable for only those disciplines which are categorized as Primary Care.

The following is the list of disciplines categorized as Primary Care in HPSL, NSL and LDS:

PROGRAM	DISCIPLINE NAME
LDS	AllopathicMedicine
LDS	OsteopathicMedicine
LDS	Dentistry
HPSL	Dentistry
NSL	Nursing - Graduate

1A-15d. (Applicable for All Disciplines EXCEPT Allopathic and Osteopathic) Of the Total Graduates in question 1A-15a, the Number of Full-Time <program name> - <discipline name> Graduates in academic year 2012-2013 who entered the field for which they received the degree

This number should represent the number of graduates in the current reporting period for the discipline reporting program who are practicing in the field for which they received the degree.

1A-15e. (Applicable for All Disciplines EXCEPT Allopathic and Osteopathic) Of the Total Graduates in question 1A-15a, the Number of Full-Time <program name> - <discipline name> Graduates in academic year 2012-2013 who entered service in a rural area.

This number should represent the number of graduates in the current reporting period who entered service in a rural area.

To determine whether the Census tract of the graduate’s work location is eligible, visit the webpage

[Rural Health Grants Eligibility Advisor](#)

(<http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx>) and enter your address.

1A-15a. (Applicable for Allopathic and Osteopathic ONLY) Total Number of PCL –Allopathic Medicine Loan Recipients who graduated in academic year 2009 – 2010.

This number should represent the total number of PCL recipients who graduated in the academic year 2009 – 2010 and who are participating in the reporting loan program for the discipline.

1A-15b. (Applicable for Allopathic and Osteopathic ONLY) Of the Total Graduates reported in question 1A-15a, the Number of Full-time PCL <discipline name> Graduates in academic year 2009-2010 serving in Medically Underserved Communities

Enter total number of graduates in the current reporting period who are serving, or in residencies, in medically underserved communities. "Medically Underserved Communities" means any geographic area and/or population served by any of the following practice sites:

- Community Health Centers (section 330) Migrant Health Centers (section 329)
- Health Care for the Homeless Grantees (section 340) Public Housing Primary care Grantees (section 340A)
- Rural Health Clinics, federally designated (section 1861(aa)(2) of the Social Security Act)
- National Health Service Corps Sites, freestanding (section 333)
- Indian Health Service Sites (Pub. L. 93-638 for tribal operated sites and Pub.L.94-437 for IHS operated sites)
- Federally Qualified Health Centers (section 1905(a) and (1) of the Social Security Act)
- Primary Medical Care, Mental Health, and Dental Health Professional Shortage Areas (HPSAs) (designated under section 332)
- State or Local Health Departments (regardless of sponsor - for example, local health departments who are funded by the State would qualify)
- Ambulatory practice sites designated by State Governors as serving medically underserved communities
- Practices or facilities in which 50 percent or more of the patients are uninsured or Medicaid recipients.

1A-15c. (Applicable for Allopathic and Osteopathic ONLY) Of the Total Graduates reported in question 1A-15a, the Number of Full-Time PCL - <discipline name> Graduates in academic year 2009-2010 serving in Primary Care

This question is applicable for only those disciplines which are categorized as Primary Care.

The following is the list of disciplines categorized as Primary Care in PCL:

PROGRAM	DISCIPLINE NAME
PCL	AllopathicMedicine

PROGRAM	DISCIPLINE NAME
PCL	Osteopathic Medicine

1A-15d. (Applicable for Allopathic and Osteopathic ONLY) Of the Total Graduates reported in question 1A-15a, the Number of Full-Time PCL-Allopathic Medicine Graduates in academic year 2009-2010 serving in a Rural Area.

To determine whether the Census tract of the graduate’s work location is eligible, visit the webpage [Rural Health Grants Eligibility Advisor http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx](http://datawarehouse.hrsa.gov/RuralAdvisor/RuralHealthAdvisor.aspx) and enter the address.

1A-16 through 1A-19 -- (Applicable for PCL) -- The Student/Graduate Data Table

1A-16 and 17. Total graduates and graduates in primary care residency and practice

(16) Enter the total number of graduates from your school for the appropriate year, and (17) of that total, the total number of graduates in primary care for the appropriate year.

1A-18 and 19. Percentage of Graduates in Primary Health Care and Percentage Change from Prior Year

These items are automatically calculated.

Schools that do not meet one of the criteria under Participation of Graduates in Primary Health Care Residencies and Practices (see Student Financial Aid Guidelines) are subject to certain penalties. These criteria are based on the percentages calculated in 1A-18 and 19. If your school does not meet any of the three criteria for PCL program compliance, you will be billed for 30% of your current year income. "Income" is defined in section 723(d)(4) of the Public Health Service (PHS) Act to mean payments of principal and interest on any loan made from the fund, and any other earnings of the fund).

1A-16. (Applicable for LDS only) Please indicate the recruitment activities for disadvantaged students that your school uses for the LDS program by checking all box(s) that apply.

To qualify for participation in the LDS program, schools must carry out a program for recruiting and retaining students from disadvantaged backgrounds and must meet certain agreements regarding the education of students (PHS Act Section 724).

An individual from a disadvantaged background is defined as someone who:

- comes from an environment that has inhibited the individual from obtaining the knowledge, skill and abilities required to enroll in and graduate from a school; or
- comes from a family with an annual income below a level based on low-income thresholds according to family size published by the U.S. Bureau of the Census, adjusted annually for changes in the Consumer Price Index, and adjusted by the Secretary of Health and Human Services for adaptation to this program.

The Department of Health and Human Services publishes the requisite income levels in the *Federal Register* periodically.

1A-17a. (Applicable to LDS only) Please indicate the retention and/or mentoring activities for disadvantaged students your school uses for the LDS program by checking all boxes that apply:

For educational preparation, ensured that adequate instruction regarding minority health issues was provided for in the curricula of the school. Course work reflected an institutional awareness of the special health needs of minority populations.

For experience in providing clinical services, entered into arrangements with one or more health clinics providing services to a significant number of individuals who are from disadvantaged backgrounds including members of minority groups.

Entered into arrangements with one or more public or non-profit private secondary education institutions and undergraduate institutions of higher education (feeder schools) for the purpose of carrying out programs regarding:

- the educational preparation of disadvantaged students, including minority students to enter into the health professions
- the recruitment of disadvantaged students, including minority students to enter into the health professions

Established a mentoring program for assisting disadvantaged students including minority students regarding the completion of the educational requirements for degrees from the school. This program may include the involvement of students, community health professionals, faculty, alumni, past recipients (e.g., tutoring, counseling, and summer/bridge programs).

1A-17b. (Applicable for LDS only) Please indicate the type of retention and/or mentoring activities for disadvantaged students that your school uses for the LDS program by checking all boxes that apply:

Individual or Group Peer Mentor Program (big brother/big sister)		
△	Open to all	
△	Specifically designed for disadvantaged students	
△	Placing students in peer support or networks and groups	
△	Other. Please describe	
Individual Staff/Advisor Mentor Program		
△	Open to all	
△	Specifically designed for disadvantaged students	
△	Other. Please describe	
Specialized pre-attendance orientation for disadvantaged students		
△	Team and camaraderie building activities to help students feel included in the school	
△	Educate disadvantaged students on how to best use the accommodations and resources the school provides	

△	Introduce forge contacts between disadvantaged students and faculty/staff (ex: Heads of departments, Tutors, Financial aid and/or advisors)	
△	Specialized welcome packets for disadvantaged students with additional information on available recourses and programs that will help them succeed	
△	Other. Please describe	
College Skills Development and Review Programs		
△	Summer or pre-matriculation sessions in a classroom setting teaching disadvantaged students skills that they will need to be successful (e.g.: study skills, note taking skills, test taking skills, and/or time management skills)	
△	Summer or pre-matriculation classes for disadvantaged students to review and strengthen prerequisite knowledge of the course work	
△	Individual assessment and profile of disadvantaged students strengths and weaknesses with advisor and plan for development of skills	
△	Other. Please describe	
Early identification for students at risk		
△	Identify students who are falling behind early and provide assistance for them in furthering their academic career	
△	Develop individualized plans for struggling disadvantaged students to ensure success/coordination support	
△	Provide learning specialists for disadvantaged students who can identify possible learning disabilities or assess strengths and weaknesses.	
△	Seminars and lectures specifically for disadvantaged students	
△	Other. Please describe	
Group or Individual Tutoring Services		
△	Provide faculty or peer tutors to disadvantaged students	
△	Tutors specifically trained to help students faced with struggles from a disadvantaged background.	
△	Financial mentoring/tutoring	
△	Other. Please describe	

Child Care Support		
△	Free	
△	Partially subsidized	
△	Other. Please describe	
Professional Opportunities		
△	Shadowing health professional	
△	Interviewing health professional	
△	Other. Please describe	

1A-18. (Applicable for LDS only) Please share any success stories in the box below for LDS recipients. (Narrative of up to 250 characters)

Success may be students who had barriers to surmount but graduated, because of the mentoring programs or the funds provided through the LDS program.

1A-19. (Applicable for LDS only) How many LDS students and graduates in the reporting period received pipeline training from other HRSA programs (i.e., Health Careers Opportunity Program/Centers of Excellence at any period of time?)

Enter the number of LDS students and graduates during this reporting period who received pipeline training from other HRSA programs (i.e., Health Careers Opportunity Program/Centers of Excellence (COE) at any period of time. Other programs might include; Area Health Education Center (AHEC) and Minority Faculty Fellowship Program (MFFP). Type in the name of the "other" programs in addition to providing the number of students.

Cumulative numbers will be added automatically. Data for this collection will begin July 1, 2011.

1A-20. (Applicable for LDS only) Please provide the name of at least one health clinic that provides services to a significant number of individuals who are from disadvantaged backgrounds including members of minority groups, that your school uses to provide students with experience in providing clinical services to such individuals.

For this legislative requirement, only one health clinic name is necessary; however, if your school has agreements with more than one health clinic, you may provide the additional health clinic names.

NOTE: Schools that do not meet one of the criteria under Participation of Graduates in Primary Health Care Residencies and Practices (see Student Financial Aid Guidelines) are subject to certain penalties. These criteria are based on the percentages calculated here. If your school does not meet any of the three criteria for PCL program compliance, you will be billed for 30% of your current year income. "Income" is defined in section 723(d)(4) of the Public Health Service (PHS) Act to mean payments of principal and interest on any loan made from the fund, and any other earnings of the fund.

4.4 Page 1b – Student Race/Ethnicity Data Section

Page 1b of the Loans AOR Performance Report consists of a single page with two questions. This page asks for information on the number of students receiving BHW funds, the number that are enrolled or graduated by racial and/or ethnic backgrounds.

Access to Page 1b – Student Race/Ethnicity Data Section page by clicking the “**Update**” link from the Status Overview page or by clicking the “**Save and Continue**” button at the bottom of the Page 1a Student Borrower Data Section page.

Figure 18: Page 1b – Student Race/Ethnicity Data Section (Sub-question 1)

PAGE 1B - STUDENT RACE/ETHNICITY DATA SECTION						Status: Not Started	
*1. Hispanic or Latino Students							
Did your BHW funded program have students of "Hispanic or Latino ethnicity" between 7/1/2013 and 6/30/2014? Yes, I can provide counts by race as mentioned below. (Instruction: Please click on an answer option below.)							
<input type="radio"/> Yes, I can provide counts by race as mentioned below. (Instruction: Please enter counts in rows A through F.)							
<input type="radio"/> Yes, I can only provide total counts but cannot provide counts by race. (Instruction: Please enter total student counts in row G.)							
<input type="radio"/> Yes, I can provide some of the counts by race but not all. (Instruction: Please enter counts for which you have information in rows A through F and enter total student counts in row G. Sum of rows A through F can be lesser than G.)							
<input type="radio"/> No, my program does not have Hispanic or Latino students. (Instruction: Data is not required in this section.)							
Hispanic or Latino Students by Race		?	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
A. American Indian or Alaska Native							
B. Asian - All (including underrepresented)							
B1. Asian - underrepresented, if known							
C. Black or African American							
D. Native Hawaiian or Other Pacific Islander							
E. White							
F. More than one race To enter data for race combinations click here							
TOTAL (A + B + C + D + E + F)							
Hispanic or Latino Students All Races		?	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
G. All races							

*This figure is an example, the fields on this page will change based on the answer you make at the top of the question.

1. There are four sub-questions at the top of question 1 “Hispanic or Latino Students.” Click “Yes” to “I can provide counts by race as mentioned above.” This will enable the cells on lines A though E (Figure 18Figure 18: Page 1b – Student Race/Ethnicity Data Section (Sub-question 1)).
2. Answer all the appropriate questions for 1.
3. Click the “**Save**” button to save the data and proceed to question 2.

OR

Figure 19: Page 1b – Student Race/Ethnicity Data Section (Sub-question 2)

PAGE 1B - STUDENT RACE/ETHNICITY DATA SECTION Status: **Not Started**

***1. Hispanic or Latino Students**
 Did your BHW funded program have students of "Hispanic or Latino ethnicity" between **7/1/2013 and 6/30/2014**?
Yes, I can only provide total counts but cannot provide counts by race. (Instruction: Please click on an answer option below.)

Yes, I can provide counts by race as mentioned below. (Instruction: Please enter counts in rows A through F.)

Yes, I can only provide total counts but cannot provide counts by race. (Instruction: Please enter total student counts in row G.)

Yes, I can provide some of the counts by race but not all. (Instruction: Please enter counts for which you have information in rows A through F and enter total student counts in row G. Sum of rows A through F can be lesser than G.)

No, my program does not have Hispanic or Latino students. (Instruction: Data is not required in this section.)

Hispanic or Latino Students by Race	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
A. American Indian or Alaska Native					
B. Asian - All (including underrepresented)					
B1. Asian - underrepresented, if known					
C. Black or African American					
D. Native Hawaiian or Other Pacific Islander					
E. White					
F. More than one race To enter data for race combinations click here					
TOTAL (A + B + C + D + E + F)					
Hispanic or Latino Students All Races	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
G. All races					

*This figure is an example, the fields on this page will change based on the answer you make at the top of the question.

1. Click "Yes" to "I can only provide total counts but cannot provide counts by race." This will disable the cells on lines A through E, but it will enable line G (Figure 19).
2. Answer all the appropriate questions for 1.
3. Click the "Save" button to save the data and proceed to question 2.

OR

Figure 20: Page 1b – Student Race/Ethnicity Data Section (Sub-question 3)

PAGE 1B - STUDENT RACE/ETHNICITY DATA SECTION Status: **Not Started**

***1. Hispanic or Latino Students**
 Did your BHW funded program have students of "Hispanic or Latino ethnicity" between **7/1/2013 and 6/30/2014**?
Yes, I can provide some of the counts by race but not all. (Instruction: Please click on an answer option below.)

Yes, I can provide counts by race as mentioned below. (Instruction: Please enter counts in rows A through F.)

Yes, I can only provide total counts but cannot provide counts by race. (Instruction: Please enter total student counts in row G.)

Yes, I can provide some of the counts by race but not all. (Instruction: Please enter counts for which you have information in rows A through F and enter total student counts in row G. Sum of rows A through F can be lesser than G.)

No, my program does not have Hispanic or Latino students. (Instruction: Data is not required in this section.)

Hispanic or Latino Students by Race	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
A. American Indian or Alaska Native					
B. Asian - All (including underrepresented)					
B1. Asian - underrepresented, if known					
C. Black or African American					
D. Native Hawaiian or Other Pacific Islander					
E. White					
F. More than one race To enter data for race combinations click here					
TOTAL (A + B + C + D + E + F)					
Hispanic or Latino Students All Races	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
G. All races					

*This figure is an example, the fields on this page will change based on the answer you make at the top of the question.

1. Click “Yes” to “I can provide some of the counts by race but not all.” This will enable the cells on lines A through G (Figure 20).
2. Answer all the appropriate questions for 1.

OR

Figure 21: Page 1b – Student Race/Ethnicity Data Section (Sub-question 4)

PAGE 1B – STUDENT RACE/ETHNICITY DATA SECTION Status: **Not Started**

***1. Hispanic or Latino Students**

Did your BHW funded program have students of "Hispanic or Latino ethnicity" between **7/1/2013 and 6/30/2014**?
No, my program does not have Hispanic or Latino students. (Instruction: Please click on an answer option below.)

Yes, I can provide counts by race as mentioned below. (Instruction: Please enter counts in rows A through F.)

Yes, I can only provide total counts but cannot provide counts by race. (Instruction: Please enter total student counts in row G.)

Yes, I can provide some of the counts by race but not all. (Instruction: Please enter counts for which you have information in rows A through F and enter total student counts in row G. Sum of rows A through F can be lesser than G.)

No, my program does not have Hispanic or Latino students. (Instruction: Data is not required in this section.)

Hispanic or Latino Students by Race	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
A. American Indian or Alaska Native					
B. Asian - All (including underrepresented)					
B1. Asian - underrepresented, if known					
C. Black or African American					
D. Native Hawaiian or Other Pacific Islander					
E. White					
F. More than one race To enter data for race combinations click here					
TOTAL (A + B + C + D + E + F)					
Hispanic or Latino Students All Races	Enrollment of Discipline (A)	New Student Recipients (B)	Recipients Other Than New Who Did Not Graduate (C)	Recipients Other Than New Who Graduated (D)	Total Recipients (B+C+D)
G. All races					

*This figure is an example, the fields on this page will change based on the answer you make at the top of the question.

1. Click “NO” to “I can provide some of the counts by race but not all.” This will disable ALL of the cells for question 1 (Figure 21).
2. Proceed to question 2 (not shown).

QUESTION 2: Non-Hispanic/Non-Latino

1. Repeat the steps from question 1 to complete the “Non-Hispanic or Non-Latino Students” section of Page 1b.
2. Complete all the appropriate cells for questions 2 based on your answer of the sub-question 2.
3. Click the “**Save and Continue**” link to save the data and proceed to Page 2.

You can click the help icon  to display help in a popup window.

Select the category of race/ethnicity using the following definitions that most closely reflect the individual's recognition in his/her community for the purpose of reporting on persons who are of mixed racial and/or ethnic origins. *If information is not available, it may be omitted from the table.*

Race:

- *American Indian or Alaska Native:* A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.
- *Asian:* A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent including for example Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- *Asian Underrepresented:* Any Asian (see above definition) **other than** Chinese, Filipino, Japanese, Korean, Asian Indian, or Thai.
- *Black or African American:* A person having origins in any of the Black racial groups of Africa.
- *Native Hawaiian or Other Pacific Islander:* A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- *More than One Race:* A person having origins from more than one race.
- *White:* A person having origins in any of the original peoples of Europe, North America, or the Middle East or North Africa.

Ethnicity:

- *Hispanic or Latino:* A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origins regardless of race.
- *Non-Hispanic/Non-Latino:* A person not having origins of Mexican, Puerto Rican, Cuban, Central or South American.

4.5 Page 2 – Program Account Section

Page 2 of the Loans AOR Performance Report consists of a single page with two questions (Figure 22). This page asks for account information in the form of cash receipts and disbursements. Cumulative data will be pulled from previous year.

Access to Page 2 – Program Account Section page by clicking the “**Update**” link from Status Overview page or by clicking the “**Save and Continue**” button at the bottom of the Page 1b Student Race/Ethnicity Data Section page.

Figure 22: Page 2 – Program Account Section

PAGE 2 - PROGRAM ACCOUNTS SECTION		Status: Not Started	
Program Accounts		Cumulative (includes current year)	Current Year
A.	FEDERAL FUNDS AWARDED <input type="checkbox"/>	\$	\$
B.	CASH BALANCE - START OF REPORT PERIOD <input type="checkbox"/>		\$
*C. CASH RECEIPTS			
1.	Federal Funds Received/Receivable <input type="checkbox"/>	\$	\$
2.	Institutional Contributions Deposited <input type="checkbox"/>	\$	\$
3.	Transferred from Scholarship Fund	\$	
4.	Loan Principal Collected	\$	\$
5.	Interest Income Collected on Loans	\$	\$
6.	Penalty Charges Collected on Loans	\$	\$
7.	Investment Income	\$	\$
8.	Institutional Repayments of Bad Debts, Principal	\$	\$
9.	Institutional Repayments of Bad Debts, Interest	\$	\$
10.	Institutional Repayments of Bad Debts, Penalty Charges	\$	\$
11.	Cash Receipts Total (sum of C.1 through C.10)	\$	\$
<input type="button" value="Save"/>			
*D. CASH DISBURSEMENTS			
1.	Loaned to Students <input type="checkbox"/>	\$	\$
2.	Transferred to Scholarship Fund	\$	
3.	Repayments to Federal Government, Principal <input type="checkbox"/>	\$	\$
4.	Repayments to Federal Government, Interest <input type="checkbox"/>	\$	\$
5.	Repayments to Federal Government, Other Income <input type="checkbox"/>	\$	\$
6.	Repayments to Institution, Principal	\$	\$
7.	Repayments to Institution, Interest	\$	\$
8.	Repayments to Institution, Other Income	\$	\$
9.	Collection Agent Costs, Principal <input type="checkbox"/>	\$	\$
10.	Collection Agent Costs, Interest <input type="checkbox"/>	\$	\$
11.	Litigation Costs, Principal <input type="checkbox"/>	\$	\$
12.	Litigation Costs, Interest <input type="checkbox"/>	\$	\$
13.	Credit Bureau Fees	\$	\$
14.	Other Costs <input type="checkbox"/>	\$	\$
15.	Cash Disbursements Total (sum of D.1 through D.14)	\$	\$
E.	CASH BALANCE - END OF REPORT PERIOD (CASH BALANCE START OF REPORT PERIOD + CASH RECEIPTS - CASH DISBURSEMENTS)	\$	\$
<input type="button" value="Go to Previous Page"/>		<input type="button" value="Save"/> <input type="button" value="Save and Continue"/>	

*The gray fields on this page will be pre-populated with prior data or they will automatically calculate.

There are 26 total questions on this page.

1. Answer all the appropriate questions for Cash Receipts and Cash Disbursements.
2. Click the “**Save and Continue**” link to save the data and proceed to Page 3.

Repayments to Federal Government, Principal, Interest and Other Income

- This amount should be the current amounts of this program’s principal, interest and other income repaid to the Federal Government
- An example of Repayments to Federal Government is excess cash returned to the Division of Financial Operations. DO NOT include amounts returned to PMS because those amounts should be adjusted against Federal Funds Received within the appropriate award period.
- Payment made last year for the PCL assessment should be reported on Page 2 – Program Accounts Section in Part D – Cash Disbursements Lines 3-5 – Repayments to Federal Government. In order to report your assessment in the three lines of the AOR (i.e., principal, interest, and penalty charges), apply the 30% assessment amount to the items defined as income (shown on your assessment notice) and report them in the appropriate sections.
- For purposes of reporting, the amounts determined for penalty charges and investment income may be combined and reported as “other income.” In addition, the school should repay itself the proportionate share of institutional matching funds (1/9) associated with the amount of funds returned for PCL. These amounts would be broken down the same way as Repayments to Federal Government, but reported on Lines 6-8 – Repayments to Institution, Principal, Interest, and Other Income. Please refer to the Student Financial Aid Guidelines for further information. If you have any questions on your school's compliance, refer to Appendix A of the Loans AOR Guidance document for contact information.

NOTE: Make check payable to Public Health Service and enclose a letter with the following information:

- Name of institution (including discipline)
- Type and purpose of program funds being remitted (e.g., Federal Capital Contribution – HPSL program, remittance of student loan collections)
- The core Grant number (Box 4b on the Notice of Grant Award)
- The amount of principal, interest, and other income, if any.

4.6 Page 3 – Program Accounts Section

Page 3 of the Loans AOR Performance Report is a continuation of Page 2 (Figure 23). This page asks for account information for the program receiving funds from a BHW program.

Access the Page 3 – Program Account Section (Continued) page by clicking the **“Update”** link from Status Overview page or by clicking the **“Save and Continue”** button at the bottom of the Page 2 – Program Account Section page.

Figure 23: Page 3 – Program Account Section (Continued)

PAGE 3 - PROGRAM ACCOUNTS SECTION								Status: Not Started	
Program Accounts (Continued)		Cumulative (Includes current year)			Current Year				
*F.	LOAN CANCELLATIONS TO BORROWERS	Number of Borrowers	Principal	Interest	Number of Borrowers	Principal	Interest		
1.	Professional Practice								
	a. HP Practice-Shortage (10%)								
	b. HP Practice-Rural Shortage (15%)								
	c. Total (Sum of 1.a and 1.b)								
2.	Nursing Employment								
	a. Nursing Employment (10%)		\$	\$		\$	\$		
	b. Nursing Employment (15%)		\$	\$		\$	\$		
	c. Nursing Employment (20%)		\$	\$		\$	\$		
	d. Nursing Employment (15%) on or after 03/23/2010		\$	\$		\$	\$		
	e. Nursing Employment (20%) on or after 03/23/2010		\$	\$		\$	\$		
	f. Nursing Employment (Other) on or after 03/23/2010		\$	\$		\$	\$		
	g. Total (sum of 2.a through 2.f)		\$	\$		\$	\$		
3.	Death								
	a. On NSL Loans made on or after 10/22/85		\$	\$		\$	\$		
	b. On Loans except those reported in F.3.a		\$	\$		\$	\$		
	c. Total (Sum of 3.a and 3.b)		\$	\$		\$	\$		
4.	Permanent & Total Disability Approved by HHS								
	a. On NSL Loans made on or after 10/22/85		\$	\$		\$	\$		
	b. On Loans except those reported in F.4.a		\$	\$		\$	\$		
	c. Total (Sum of 4.a and 4.b)		\$	\$		\$	\$		
*G.	BAD DEBTS APPROVED FOR WRITE-OFF BY HHS	Number of Borrowers	Principal	Interest	Penalty Charges	Number of Borrowers	Principal	Interest	Penalty Charges
	Total Approved		\$	\$	\$		\$	\$	\$

Go to Previous Page Save Save and Continue

*This figure is an example, the text on this page will change based on the program specific AOR you are completing.

1. There are multiple questions on this page. The cells will be enabled or disabled based on the type of program.
2. Answer all the enabled questions.
3. Click the **“Save and Continue”** link to save the data and proceed to Page 4.

Question F.3.a and F.4.a are dynamic; this means the program name will be specific to the program you are working on at the time.

Fields F.2.d, F.2.e and F.2.f are new and are only applicable for the NSL program.

4.7 Page 4 – Excess Cash Worksheet

The Page 4 Excess Cash Worksheet of the Loans AOR Performance Report (Figure 24) is to be completed using information about any program excess cash. This page does not need to be completed for schools that are closing.

Access the Page 4 – Excess Cash Worksheet page by clicking the “**Update**” link from Status Overview page or by clicking the “**Save and Continue**” button at the bottom of the Page 3 – Program Account Section (Continued) page.

Figure 24: Page 4 – Excess Cash Worksheet

PAGE 4 - EXCESS CASH WORK SHEET SECTION		Status: Not Started
A.	General Ledger Cash Balance as of 6/30/2012	\$ <input type="text"/>
B.	Actual Collections for 7/1/2012 - 6/30/2013	
	1. Principal	\$ <input type="text"/>
	2. Interest	\$ <input type="text"/>
	3. Investment Income and Penalty Charges	\$ <input type="text"/>
	4. Institutional Repayments of Bad Debts (Principal, Interest & Penalty Charges)	\$ <input type="text"/>
C.	Federal Funds Received/Receivable 7/1/2012 - 6/30/2013	\$ <input type="text"/>
D.	Institutional Contribution for 7/1/2012 - 6/30/2013	\$ <input type="text"/>
*E.	Projected Collections for 7/1/2013 - 6/30/2014	
	1. Principal	\$ <input type="text"/>
	2. Interest	\$ <input type="text"/>
	3. Investment Income and Penalty Charges	\$ <input type="text"/>
F.	Projected Funds Available as of 6/30/2014 (A + B + C + D + E)	\$ <input type="text"/>
G.	Actual Expenditures for 7/1/2012 - 6/30/2013	
	1. Loans to Students	\$ <input type="text"/>
	2. Costs(Collection, Litigation, Credit Bureau and Other)	\$ <input type="text"/>
	3. Repayments to Federal Government and Institution (Principal, Interest and Other Income)	\$ <input type="text"/>
*H.	Projected Expenditures for 7/1/2013 - 6/30/2014	
	1. Loans to Students	\$ <input type="text"/>
	2. Costs(Collection, Litigation and Credit Bureau)	\$ <input type="text"/>
I.	Projected Expenditures as of 6/30/2014 (G + H)	\$ <input type="text"/>
J.	Projected Cash Balance as of 6/30/2014 (F - I)	\$ <input type="text"/>
*K.	Less Projected Expenditures for 7/1/2014 - 6/30/2016	\$ <input type="text"/>
L.	Excess Cash (J - K)	\$ <input type="text"/>
M.	General Ledger Ending Cash Balance as of 6/30/2013	\$ <input type="text"/>

*This page will NOT be available schools that are closing regardless of the AOR you are completing.

1. There are multiple questions on this page. The cells will be enabled or disabled based on the type of program.
2. Answer all the enabled questions.
3. Click the “**Save and Continue**” link to save the data and proceed to Page 5.

This page is not required for closing schools. Page 4 will NOT appear on the left side menu.

4.8 Page 5 – Program Accounts Section

Page 5 of the Loans AOR Performance Report is a continuation of Page 2 and Page 3 (Figure 25). This page asks for account information for the program receiving funds from a BHW program.

Access the Page 5 – Program Account Section (Continued) page by clicking the “**Update**” link from Status Overview page or by clicking the “**Save and Continue**” button at the bottom of the Page 4 – Excess Cash Worksheet page.

Figure 25: Page 5 – Program Account Section (Continued)

Fields marked with an asterisk (*) are required.

PAGE 5 - PROGRAM ACCOUNTS SECTION Status: **Not Started**

Program Accounts (Continued)		
*H. FROM WORKSHEET CALCULATIONS		
1.	Default Rate	<input type="text"/> %
FOR ACTIVE SCHOOLS		
2.	Excess Cash from report page 4 that was or will be returned to PMS	\$ <input type="text"/>
3.	Excess Cash from report page 4 that was or will be returned to the Division of Financial Operations	\$ <input type="text"/>
FOR CLOSING SCHOOLS		
4.	Amount of cash determined to be due the Federal Government and remitted separately to the Division of Financial Operations	\$ <input type="text"/>
*I. CHECK LIST/QUESTIONS		
1.	What is the total amount of interest that is past due?	<input checked="" type="checkbox"/> \$ <input type="text"/>
AUDITS		
2.	Does your institution provide for a biennial audit of the loan and/or scholarship funds by a qualified independent auditor?	<input type="radio"/> Yes <input type="radio"/> No
	a. Period of last audit (Please enter dates: mm/yyyy)	From: <input type="text"/> / <input type="text"/> / <input type="text"/> To: <input type="text"/> / <input type="text"/> / <input type="text"/>
	b. Date audit submitted to Regional Audit Agency (Please enter dates: mm/yyyy)	<input type="text"/> / <input type="text"/> / <input type="text"/>

*The gray fields on this page will be pre-populated with prior data or they will automatically calculate.

1. There are multiple questions on this page.
2. Answer all the account information questions.
3. Click the “**Save and Continue**” link to save the data and proceed to Page 6a.

For a copy of WORK SHEET Page 6 See the Loans AOR Guidance document.

4.9 Page 6a – Borrower Accounts Worksheet

Page 6a of the Loans AOR Performance Report is asking for information on borrower accounts (Figure 26). The information requested is specific to the program receiving funds from a BHW program. Access the Page 6a – Borrower Accounts Worksheet page by clicking the **“Update”** link from Status Overview page or by clicking the **“Save and Continue”** button at the bottom of the Page 5 – Program Account Section (Continued) page.

Figure 26: Page 6a – Borrower Accounts Worksheet

MANAGE BORROWER ACCOUNT ATTACHMENTS

Download Excel Document

Upload Excel Document

Select	Purpose	Document Name	Size	Uploaded By	Description
No attached document exists.					
<input type="button" value="Attach"/>					

Process Excel Document

Fields marked with an asterisk (*) are required.

PAGE 6A - BORROWER ACCOUNTS WORKSHEET SECTION **Status: Not Started**

Borrower Accounts		Number of Borrowers (1)	Principal Loaned (2)	Principal Repaid (3)
*1. FULLY RETIRED				
A.	Repayment/Prof Pract/Cancel	<input checked="" type="checkbox"/>	\$	\$
B.	Cancellation/Death	<input type="checkbox"/>	\$	\$
C.	Cancellation/Disability	<input type="checkbox"/>	\$	\$
D.	Discharged in Bankruptcy	<input checked="" type="checkbox"/>	\$	\$
E.	HHS Approved Write-off	<input type="checkbox"/>	\$	\$
F.	Uncollectible per P.L. 100-607	<input type="checkbox"/>	\$	\$
G.	Total (sum of 1.A through 1.F)	<input type="text"/>	\$	\$
*2. CURRENT				
A.	Student Status	<input type="checkbox"/>	\$	\$
B.	Grace Period	<input type="checkbox"/>	\$	\$
C.	Deferment Status	<input type="checkbox"/>	\$	\$
D.	Postponement/Cancellation	<input checked="" type="checkbox"/>	\$	\$
E.	Repayment - Not Past Due	<input type="checkbox"/>	\$	\$
F.	Past Due 1-119 Days	<input checked="" type="checkbox"/>	\$	\$
G.	Total (sum of 2.A through 2.F)	<input type="text"/>	\$	\$
*3. IN BANKRUPTCY				
A.	Pending Discharge/Wage Earners Agreement	<input type="checkbox"/>	\$	\$
*4. IN DEFAULT				
A.	120 Days and Over	<input checked="" type="checkbox"/>	\$	\$
*5. FORBEARANCE				
A.	Forbearance	<input type="checkbox"/>	\$	\$
TOTAL		<input type="text"/>	\$	\$

*The gray fields on this page will be pre-populated with prior data or they will automatically calculate.

1. There are multiple questions on this page.
2. Answer all the borrower account information questions.
3. Click the **“Save and Continue”** link to save the data and proceed to Page 6b.

Page 6a has access to the Page 6 Template. The Page 6 Template can be downloaded using the “Download Page 6 Template” button at the top of the page.

4.10 Page 6b – Borrower Accounts Worksheet (continued)

Page 6b of the Loans AOR Performance Report asks for information on borrower accounts (Figure 27). The information requested is specific to the program receiving funds from a BHW program. Access the Page 6b – Borrower Accounts Worksheet (continued) page by clicking the “Update” link from Status Overview page or by clicking the “Save and Continue” button at the bottom of the Page 6a – Borrower Accounts Worksheet page.

Figure 27: Page 6b – Borrower Accounts Worksheet (continued)

Fields marked with an asterisk (*) are required.

PAGE 6B - BORROWER ACCOUNTS WORKSHEET SECTION Status: Not Started

Borrower Accounts		PRINCIPAL CANCELED		Principal Delinquent (6)
		Employment/Prof Pract (4)	Death/Disability (5)	
*1. FULLY RETIRED				
A.	Repayment/Pr of Pract./Cancel	<input type="checkbox"/> \$		
B.	Cancellation/Death	\$	\$	
C.	Cancellation/Disability	\$	\$	
D.	Discharged in Bankruptcy	<input type="checkbox"/> \$		
E.	HHS Approved Write-off	\$		
F.	Uncollectible per P.L. 100-607	\$		
G.	Total (sum of 1.A through 1.F)	\$	\$	
*2. CURRENT				
A.	Student Status			
B.	Grace Period			
C.	Deferment Status	\$		
D.	Postponement/Cancellation	<input type="checkbox"/> \$		
E.	Repayment - Not Past Due	\$		
F.	Past Due 1-119 Days	<input type="checkbox"/> \$		\$
G.	Total (sum of 2.A through 2.F)	\$		\$
*3. IN BANKRUPTCY				
A.	Pending Discharge/Wage Earners Agreement	\$		\$
*4. IN DEFAULT				
A.	120 Days and Over	<input type="checkbox"/> \$		\$
*5. FORBEARANCE				
A.	Forbearance	\$		\$
TOTAL		\$	\$	\$

Go to Previous Page Save Save and Continue

*The gray fields on this page will be pre-populated with prior data or they will automatically calculate.

1. There are multiple questions on this page.
2. Answer all the borrower account information questions.

3. Click the “Save and Continue” link to save the data and proceed to Page 6c.

Page 6a has access to the Page 6 Template. The Page 6 Template can be downloaded using the “Download Page 6 Template” button at the top of the page.

4.11 Page 6c – Borrower Accounts Worksheet (continued)

Page 6c of the Loans AOR Performance Report asks for information on borrower accounts (Figure 28). The information requested is specific to the program receiving funds from a BHW program. Access the Page 6c – Borrower Accounts Worksheet (continued) page by clicking the “Update” link from Status Overview page or by clicking the “Save and Continue” button at the bottom of the Page 6c – Borrower Accounts Worksheet (continued) page.

Figure 28: Page 6c – Borrower Accounts Worksheet (continued)

Fields marked with an asterisk (*) are required.

PAGE 6C - BORROWER ACCOUNTS WORKSHEET SECTION Status: **Not Started**

Borrower Accounts	Principal Uncollectible Not Past Due (7)	Principal Outstanding but Not Due (8)	Principal Written Off (9)	Capitalized Interest (10)	Reconciling Difference (column 2 - sum of columns 3 thru 9)
*1. FULLY RETIRED					
A. Repayment/Prof Pract/Cancel	<input checked="" type="checkbox"/>				
B. Cancellation/Death					
C. Cancellation/Disability					
D. Discharged in Bankruptcy	<input checked="" type="checkbox"/>	\$ <input type="text"/>			
E. HHS Approved Write off			\$ <input type="text"/>		
F. Uncollectible per P.L. 100-607			\$ <input type="text"/>		
G. Total (sum of 1.A through 1.F)	\$ <input type="text"/>		\$ <input type="text"/>		
*2. CURRENT					
A. Student Status		\$ <input type="text"/>			
B. Grace Period		\$ <input type="text"/>			
C. Deferment Status		\$ <input type="text"/>			
D. Postponement/Cancellation	<input checked="" type="checkbox"/>	\$ <input type="text"/>			
E. Repayment - Not Past Due		\$ <input type="text"/>			
F. Past Due 1-119 Days	<input checked="" type="checkbox"/>	\$ <input type="text"/>			
G. Total (sum of 2.A through 2.F)		\$ <input type="text"/>			
*3. IN BANKRUPTCY					
A. Pending Discharge/Wage Earners Agreement	\$ <input type="text"/>	\$ <input type="text"/>			
*4. IN DEFAULT					
A. 120 Days and Over	<input checked="" type="checkbox"/>	\$ <input type="text"/>	\$ <input type="text"/>		
*5. FORBEARANCE					
A. Forbearance	\$ <input type="text"/>	\$ <input type="text"/>			
TOTAL	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>		

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

*The gray fields on this page will be pre-populated with prior data or they will automatically calculate.

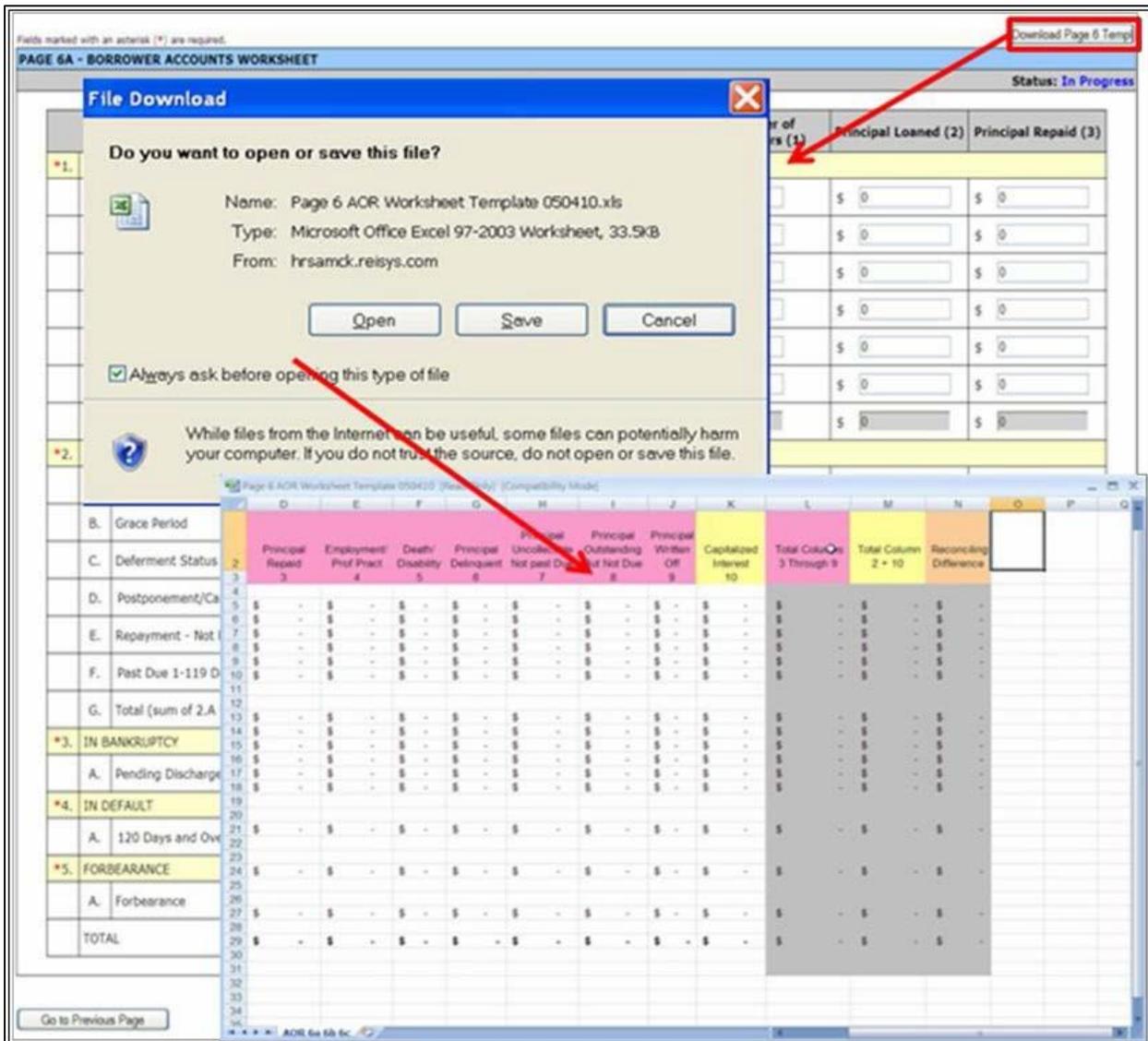
1. There are multiple questions on this page.
2. Answer all the borrower account information questions.
3. Click the “**Save and Continue**” link to save the data and proceed to Data Audit and Warning page.

Page 6a has access to the Page 6 Template. The Page 6 Template can be downloaded using the “**Download Page 6 Template**” button at the top of the page.

4.12 Page 6 Template

The Page 6 Template is an MS Excel® worksheet that can be saved and completed offline (Figure 29). The user can download the template by using the “**Download Page 6 Template**” from 6a. Any data entered partially or in total will download with the template if entered prior to the download process. The user must be on page 6a to access the Page 6 Template.

Figure 29: Page 6 Template



*Any data entered on Page 6a, 6b or 6c will populate the template at the time of download.

1. Click the “**Download Page 6 Template**” to download the excel spreadsheet.
2. Click “**Save**” button, when the Windows File Download window appears. Save the file to a location on your C: drive.
3. Once the template has been saved you can complete it offline.

Completing the data entry in the excel file will allow for multiple people who may not be registered users to contribute to the report. Once completed offline manually entering the data back into Page 6 will be much faster.

5 Reviewing and Submitting the Report

5.1 Data Audit and Warning Page

The Data Audit and Warning Page (Figure 30) must be reviewed as part of the report review process prior to submitting the AOR to HRSA. Review the Data Audit and Warning validations for your AOR information. Use the links provided to update or explain any portion of the submission.

Access the Data Audit and Warning page by clicking the “**Update**” link from Status Overview page or by clicking the “**Save and Continue**” button at the bottom of the Page 6c – Borrower Accounts Worksheet (continued) page.

Figure 30: Data Audit and Warning Page

DATA AUDIT AND WARNING	
Status: In Progress	
Note: To complete this section, all financial data pages must be completed and all data audits must be corrected or explained.	
Warnings	
<p>Warning 1130 : Return Funds to PMS</p> <p>Since the value for Excess Cash that was or will be returned to PMS (line H.2) is greater than 0, funds have to be returned to PMS. Please remember to adjust your Federal Financial Report (FFR) to reflect this return of cash.</p> <p>Action: Edit Page 5</p>	
<p>Warning 1294 : Return Funds to DFO</p> <p>Since the value for Excess Cash that was or will be returned to the Division of Financial Operations (line H.3) is greater than 0, funds have to be returned by the due date of this report.</p> <p>Action: Edit Page 5</p>	
Data Audit Status	
<p>Audit 1440 : Incorrect Number of Graduates who entered the field.</p> <p>Number of Graduates who entered the field for which they received the degree (in line PPR-2-014) cannot be blank.</p> <p>Action: Edit Page 1a Explain</p>	Edit Status: Pending Review

*These are examples of possible warnings or data audit issues.

1. Click the “**Edit Data**” link in the Warnings section or Data Audit Status sections to correct data entries.
2. Click the “**Explain**” link in the Data Audit Status section to enter exceptions.
3. Once all audit errors are fixed or explained, click “**Save**” or “**Save and Continue**” button to change the status of Data Audit and Warning page to Complete.

If the status of the page is not Complete, then one or more of the following may be the reason:

One of the Financial Data pages may not be Complete. You must complete all Financial Data pages (Page 1a through 6c) before you can complete the Data Audit and Warning page.

One or more Data Audits are not fixed or explained. Please fix or explain all audits with 'Pending Review' status.

5.2 Review Page

The Review page (Figure 31) displays, in table format, all the sections in the Loans AOR Performance Report. It allows you to view or print any or all sections.

You will be navigated to the Review page if you click the “**Save and Continue**” button at the bottom of the Data Audit and Warning page. You may also access the Review page from the left side menu.

Figure 31: Review Page

The screenshot shows the HRSA Annual Operating Report (AOR) Review Page. The page header includes the HRSA logo and the text "Annual Operating Report For 7/1/2012 - 6/30/2013". The user is identified as Robert Leahy, and the report is for E4CHP14955: CREIGHTON UNIVERSITY - SCHOOL OF NURSING. The page displays a "TABLE OF CONTENTS" table with the following sections and actions:

Section	Type	Action
Financial Data		
Page 1a	HTML	View
Page 1b	HTML	View
Page 2	HTML	View
Page 3	HTML	View
Page 4	HTML	View
Page 5	HTML	View
Page 6a	HTML	View
Page 6b	HTML	View
Page 6c	HTML	View
Comments And Certification		
Comments And Certification	HTML	View

Buttons for "Print All HTML Forms" and "Continue" are visible. A "Go to Previous Page" button is also present at the bottom left.

1. Click the “**View**” link next to any section of the report to view that section.
2. The item will open in HTML format, in a separate window.
3. Click the “**Print**” button to print the single page.
4. Click the “**Print All HTML Forms**” button to print all HTML-format forms.

5.3 Submit to HRSA

To submit the AOR to HRSA first requires that all sections of the AOR have a status of **“Complete”**. Once all sections are complete and all the Data Audit and Warning alerts have been corrected or explained the **“Submit”** button will be active on the Status Overview page (Figure 32).

Figure 32: Submit Page

The table below shows the status of the Loans Annual Operating Report. The report is currently **INCOMPLETE** and cannot be submitted in its current state. Please review each page for error and make the... ([Show Full Instruction](#))

STATUS OVERVIEW				
Loans Annual Operating Report (07/01/2012 - 06/30/2013) Hide Details				Schedule Status: Complete
Available Date	6/20/2013	Due Date	8/15/2013 12:00:00 AM	
Reporting Cycle	Academic Year	Reporting Period	07/01/2012 - 06/30/2013	
Institution Status	Active	Submission Status	Submission In Progress	
Started by	Robert Leahy On 6/24/2013 11:15:29 AM	Last Updated By	Robert Leahy On 6/24/2013 12:47:08 PM	
Last Version Submitted by				
Submission Tracking Number	AORE4C00014159/1	Project Period	7/1/2009 - 6/30/2012	
View: Related NGA Last NGA				
Users with Permissions on Loans Annual Operating Report View Details				
Name	Username	External Organization Role	Grant Role	Privileges
Loans Annual Operating Report Status				
Section	Status	Action		
Basic Information	Complete	Update		
FINANCIAL DATA				
Page 1a - Student Borrower Data Section	Complete	Update		
Page 1b - Student Race/Ethnicity Data Section	Complete	Update		
Page 2 - Program Accounts Section	Complete	Update		
Page 3 - Program Accounts Section	Complete	Update		
Page 4 - Excess Cash Work Sheet Section	Complete	Update		
Page 5 - Program Accounts Section	Complete	Update		
Page 6a - Borrower Accounts Worksheet Section	Complete	Update		
Page 6b - Borrower Accounts Worksheet Section	Complete	Update		
Page 6c - Borrower Accounts Worksheet Section	Complete	Update		
Data Audit and Warning	Complete	Update		

1. Click the **“Submit”** button when you are ready to submit the report.

NOTE: You may only submit the AOR if you are authorized to do so. If you are not authorized to submit the AOR, you will see a message that you do not have permission to submit.

2. The Loan AOR Certification page opens (Figure 33). Answer the first question with **“Yes”** or **“No”**.

3. Type **“I Agree”** in the AOR Certification box.

4. Click the **“Submit Report”** button to submit the report to HRSA.

6 Help and Support

Resource	Type	Purpose
https://grants.hrsa.gov/webexternal/home.asp	Website	HRSA Electronic Handbooks URL.
Main Number Phone: 301 443 4776	Phone	General Program or System help by phone.
Devonahline Horne Phone: 301 443 5594 Email: dhorne@hrsa.gov	Phone or E-mail	LDS Programs
Jim Essel Phone: 301 443 5799 Email: jessel@hrsa.gov	Phone or E-mail	PCL Program
Hai Le Phone: 301 443 8667 Email: HLe1@hrsa.gov	Phone or E-mail	HPSL Programs
Chris Grosso Phone: 301-443-5729 Email: cgrosso@hrsa.gov	Phone or E-Mail	NSL Programs
HRSA Contact Center Phone: 877-Go4-HRSA/877-464-4772; 301-998-7373 (9:00 AM to 5:30 PM ET M-F) Email: callcenter@hrsa.gov	Phone and/or E-mail	System help by phone or via email. Do not use for program questions.
Gloria Freeman Phone: 301 443 1032 Email: gfreeman@hrsa.gov	Phone or E-mail	Uncollectible Loans and Procedure for Write-off Due Diligence
William M. Darracot Phone: 301 443 9238	Phone	Division of Financial Operations (DFO): Questions on Closing Programs for the following: Final Liability Statement, Repayment to Federal Government, etc.

Resource	Type	Purpose
Payment Management System (PMS) Phone: 301 443 1200	Phone	Division of Payment Management (DPM): Questions on Electronic 272 Reporting and Draw Down Funds

7 Appendix

7.1 Rules for Completing AOR for Closing Schools

- ❖ Page 4 will not be displayed at all; the link will not be available on the left side menu.
- ❖ Field Level Changes – the following fields will be disabled
 - Page 1a PCL
 - 1A-1: Number of Loans (current column)
 - 1A-2: Total Dollar Amount of Loans Awarded (current column)
 - 1A-7a: Total Number of PCL Borrowers (current column)
 - Page 1a NSL, HPSL and LDS
 - 1A-1: Number of Loans (current column)
 - 1A-2: Total Dollar Amount of Loans Awarded (current column)
 - 1A-7a: Total Number of <program name> Borrowers (current column)
 - Page 2 (All Loan Programs)
 - Line C1: Federal Funds Received/Receivable (current column)
 - Line D1: Loaned to Students (current column)
 - Page 5 (All Loan Programs)
 - Line H2: Excess Cash from report Page 4 that was or will be returned to PMS
 - Line H3: Excess Cash from report Page 4 that was or will be returned to
 - Division of Financial Operations