



U.S. Department of Health and Human Services
HRSA
Health Resources and Services Administration

CHGME Portal/ HRSA Trainee Information Portal (TRIP)

User Guide

April 2018



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1. HRSA TRAINEE INFORMATION PORTAL (TRIP) (OVERVIEW)

The HRSA Trainee Information Portal (TRIP) is used to collect, manage, and submit data related to trainees in training programs funded by the Children's Hospitals Graduate Medical Education (CHGME) grant program. Hospitals will utilize TRIP as their data collection application to ease the process of reporting key information currently within the IND-GEN and IND-GEN PY forms that exist today in the Electronic Handbooks (EHBs) application.

TRIP provides users with the ability to perform the following tasks:

- Log in using existing EHBS credentials
- View dashboard of key statistics and dates
- Start programs for data collection
- Bulk upload data into portal
- Edit data within portal
- Perform program management tasks, such as adding trainees, deleting responses, and deleting programs
- Import data into the EHBs
- Export data saved in the portal from prior years

Roles: Although EHBs currently offers role-based user accounts, TRIP has the same role for each user. All users for a given hospital or organization may collect and edit data for the entire organization.



2. HOW TO USE TRIP

2.1 LOG IN

TRIP is designed to work with the existing EHBS credentials for all grantees within the CHGME program. In order to log in, users will follow the steps outlined below:

2.1.1 ACCESS THE EHBS HOME PAGE

The EHBS home page can be accessed via the following link: <https://grants.hrsa.gov/grantee>. Users will enter their existing EHBS username and password to log in, as depicted in the below image.

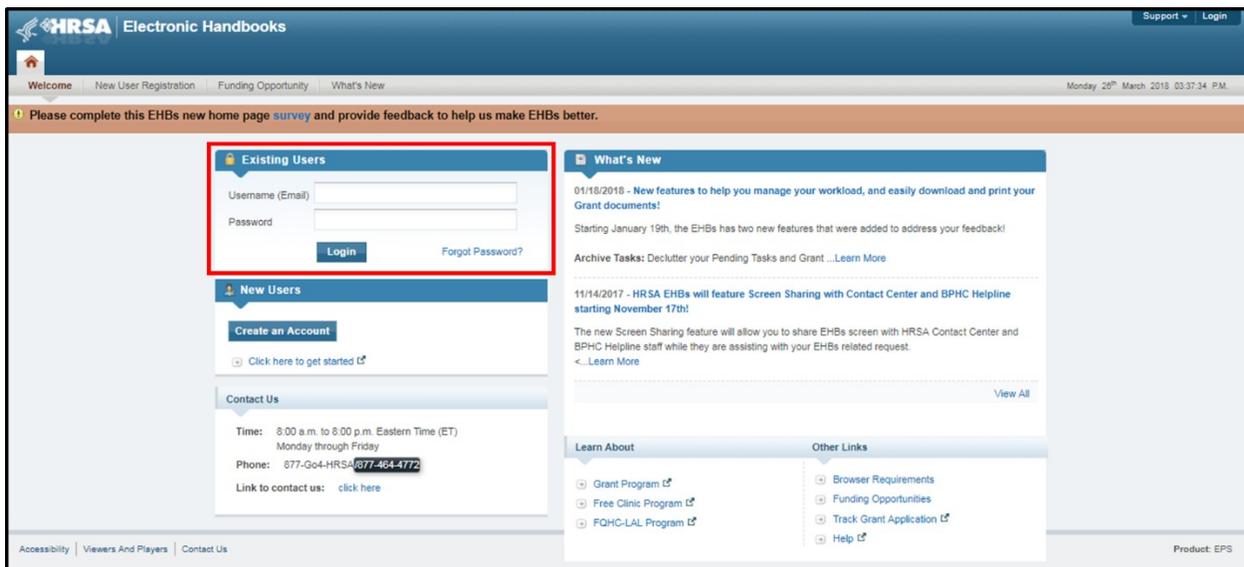


Figure 1. EHBS Home Page

2.1.2 NAVIGATE TO THE GRANTS FOLDER

Select the 'Grants' tab as identified in the below image.





Figure 2. EHBs Grants Icon

Once on this page, locate the correct grant for the CHGME program, identified by the “T23” Heading. Select the ‘Grant Folder’ link within the table.

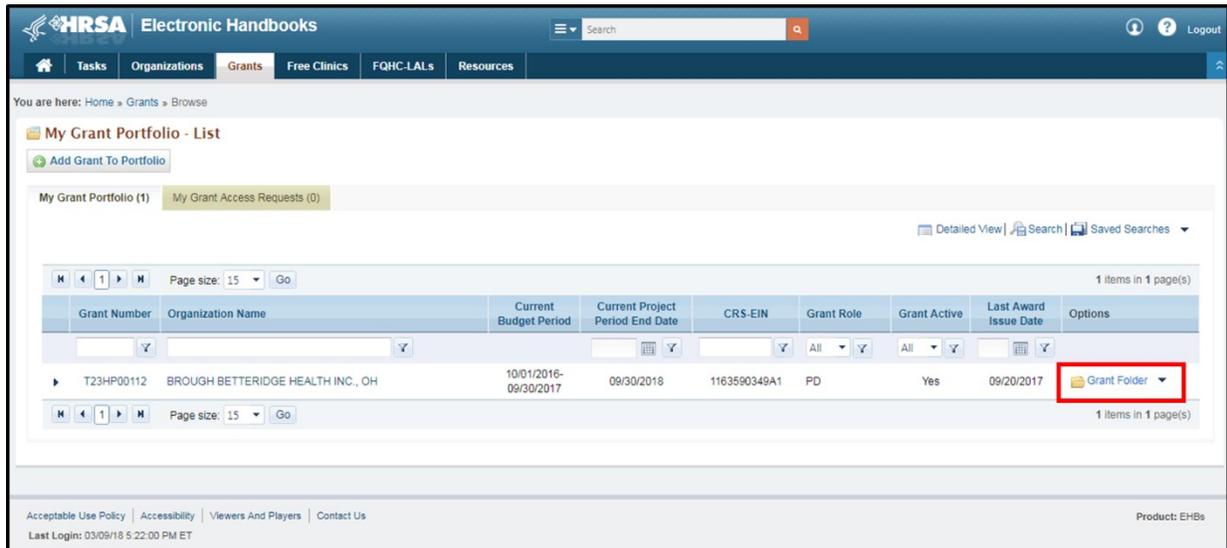


Figure 3. EHBs Grant Folder

2.1.3 LOCATE THE TRIP LINK

Scroll down the page to locate the link titled “HRSA – Trainee Information Portal (TRIP)”. Select the link to open the portal.



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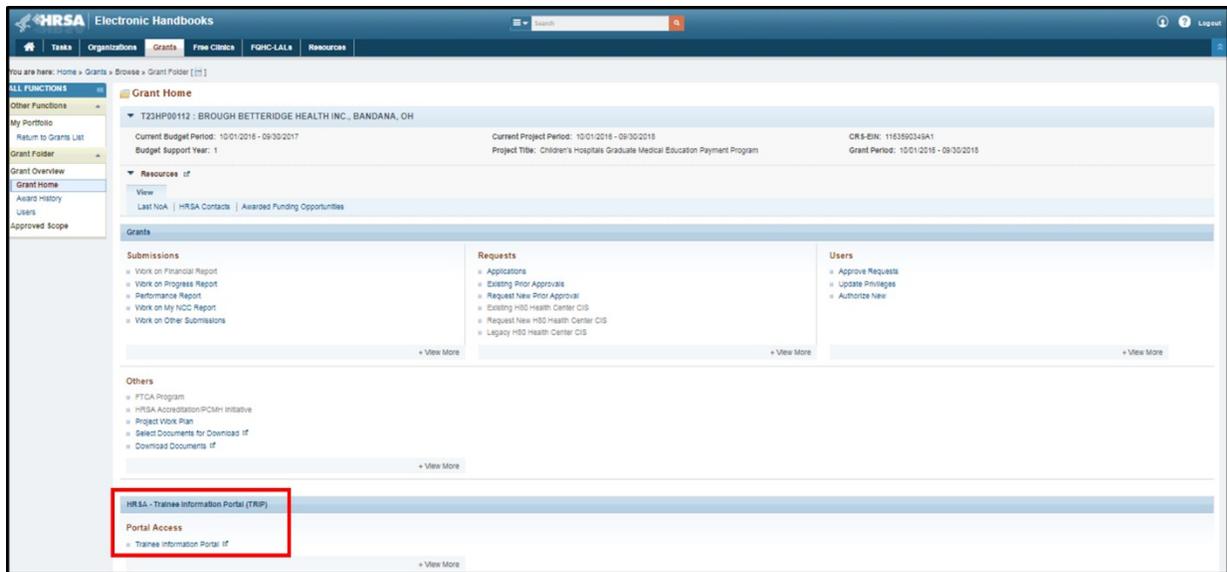


Figure 4. EHBs Link to TRIP

2.2 HOME PAGE

The home page of the portal contains key information and links to important functionality. Users can start training programs, manage or edit specific programs, access the upload and download functionality, and submit data to EHBs. A dashboard is available in the bottom right corner to display the number of complete FTE, open training programs, and days until the closure of submission from TRIP to EHB. At any point, users may return to the home page by selecting the top left logo.



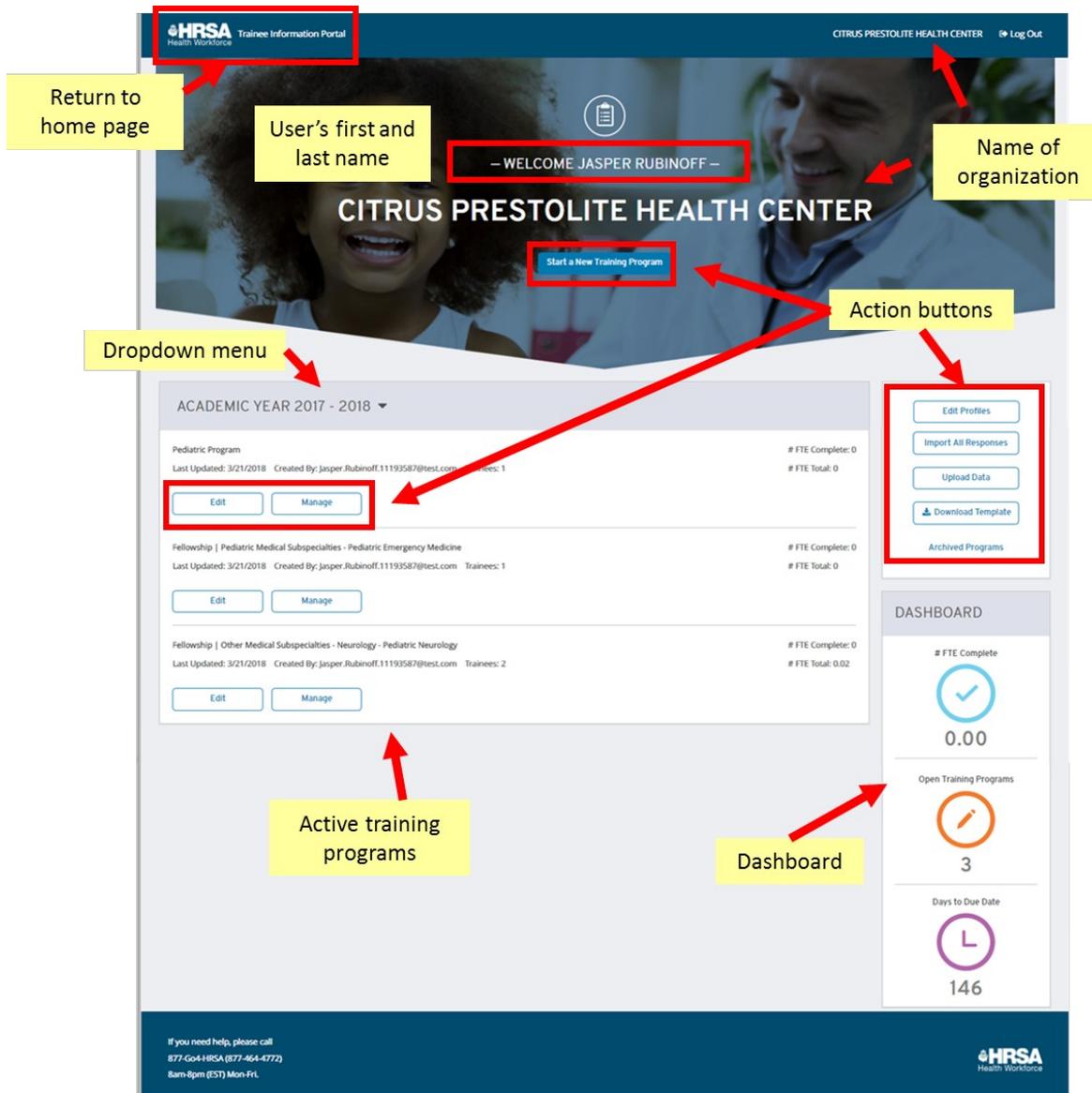


Figure 5. TRIP Home Page

The home page includes a dropdown for the academic year, as displayed above. TRIP allows users to collect data for multiple academic years. Though the dates for these collection periods may change over the next several years, TRIP will be available for collecting the 2017-2018 reporting period data from May 1st, 2018 through August 10th, 2018. The 2018-2019 reporting period data may be collected in TRIP from July 1st, 2018 through July 21st, 2019. From July 1st, 2018 to August 10th, 2018, users will be able to collect data for both the 2017-2018 academic year as well as the 2018-2019 academic year. During this time period, the dropdown menu for academic year will display both years; users may switch between the two options to view and edit data associated with that academic year.

2.3 START PROGRAM



Users must start a training program within TRIP prior to collecting data for the given training program in a selected academic year. This process will enable users to select an academic year, provide details, and add new trainee records to the training program.

To start a training program, select the “Start a Training Program” button from the home page as displayed below.

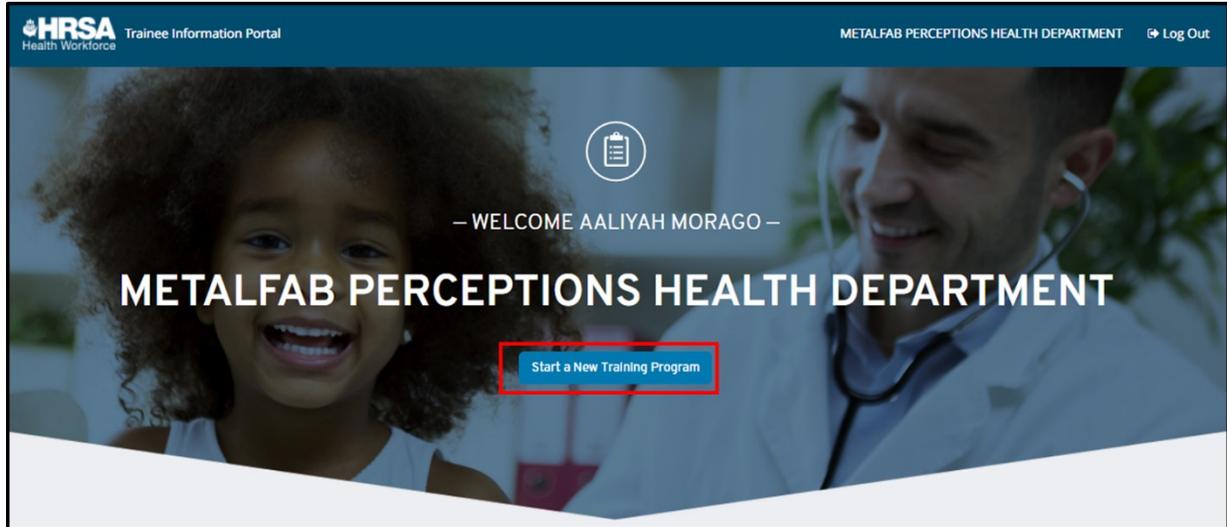


Figure 6. Start Program Button

This leads you into a two-step process to start the program, the first of which is shown below.

Figure 7. Start Program - Page 1

In the first step of this process, the user must enter the following fields:

1. Academic Year

Select the academic year pertaining to the program that you would like to collect data for. Users may start training programs during the TRIP reporting period for the academic year; during the beginning and end of each academic year, there will



be overlapping reporting periods during which time users will be able to start training programs for either academic year. This will be reflected in the dropdown menu when the functionality is available.

2. Training Program

This is a list of all of the training programs that are active in EHBs for the current year, as well as the training programs that were active in EHBs for the previous year. If you are starting a new training program that is not currently in EHBs, you may select the value “Program Not Listed” and enter in a placeholder name in the next field. Please refer to the relevant section in the EHBs training manual for further instructions on setting up training programs in EHBs.

3. Placeholder Name

For programs that are not listed in EHBs, users must enter in a placeholder name to identify the program. This must be linked to an EHBs program prior to data submission; refer to the [‘Link Program’](#) section below for additional detail.

4. Contact Phone Number

This is the phone number that will be displayed on the survey for trainees needing assistance; we recommend that you enter in an appropriate phone number for the relevant training program.

5. Description

Users may enter in a brief description to further identify the training program and add context for other organization users. This will be displayed on the program management page.

By selecting ‘Cancel’, users will return to the home page; to continue with starting the program, users may select “Next”. This will bring them to the following screen:

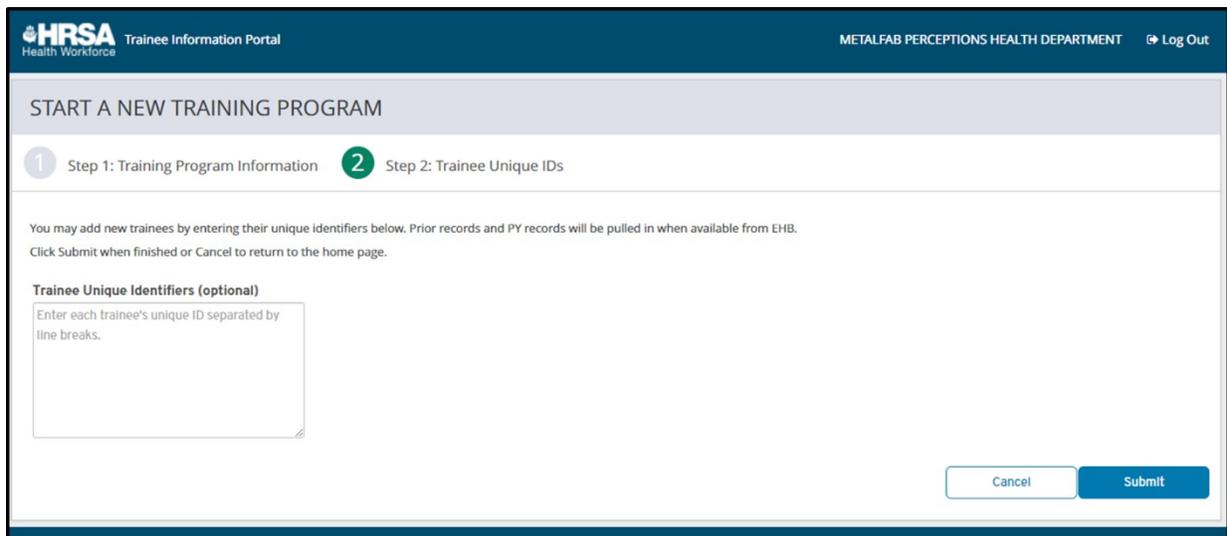


Figure 8. Start Program – Page 2

The second step allows users to add new trainees, if applicable. Trainees should be added by unique ID meeting the format as established by EHBs (seven alphanumeric characters). Users may also skip this step if they do not wish to add any new trainees at this time. To complete the program creation, users must select the “Submit” button.

At this time, users will be notified if they are trying to add any duplicate records. These are unique IDs that were reported on the previous year’s IND-GEN form that will be brought in automatically when available from EHBs.



Users will be notified of this and the duplicate record will not be added. The user is then brought to the program management page, further detailed below.

2.4 DOWNLOAD TEMPLATE

TRIP allows grantees the capability of downloading a template for offline data collection that can later be uploaded into the portal for the purposes of bulk creating/updating trainee records. This template is accessible via the TRIP home page. From the home page, users should ensure that they have selected the appropriate academic year for their template, as it will be populated with their training programs for the given year.

Once the academic year has been selected, users may select the “Download Template” link from the panel on the right of the home page.



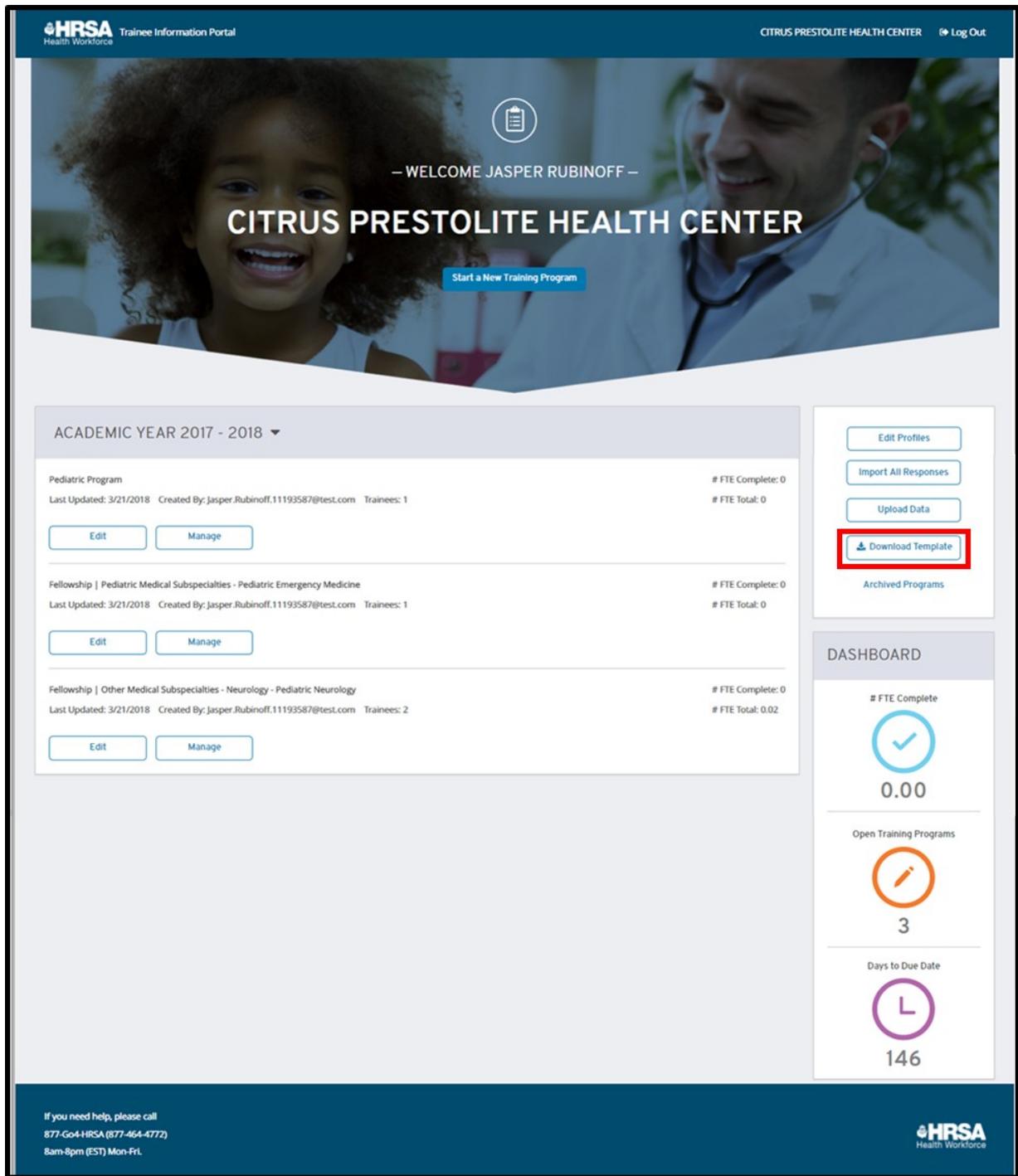


Figure 9. Download Template Button

The template will then download to the individual's computer. If you are having trouble accessing the downloaded file, please contact your computer administrator as it may be due to security restrictions on your Internet settings. **Please note that macros must be enabled in order to use the template with the required validations.** In order to do this, select the "Enable Macros" button as called out in the following screenshot.



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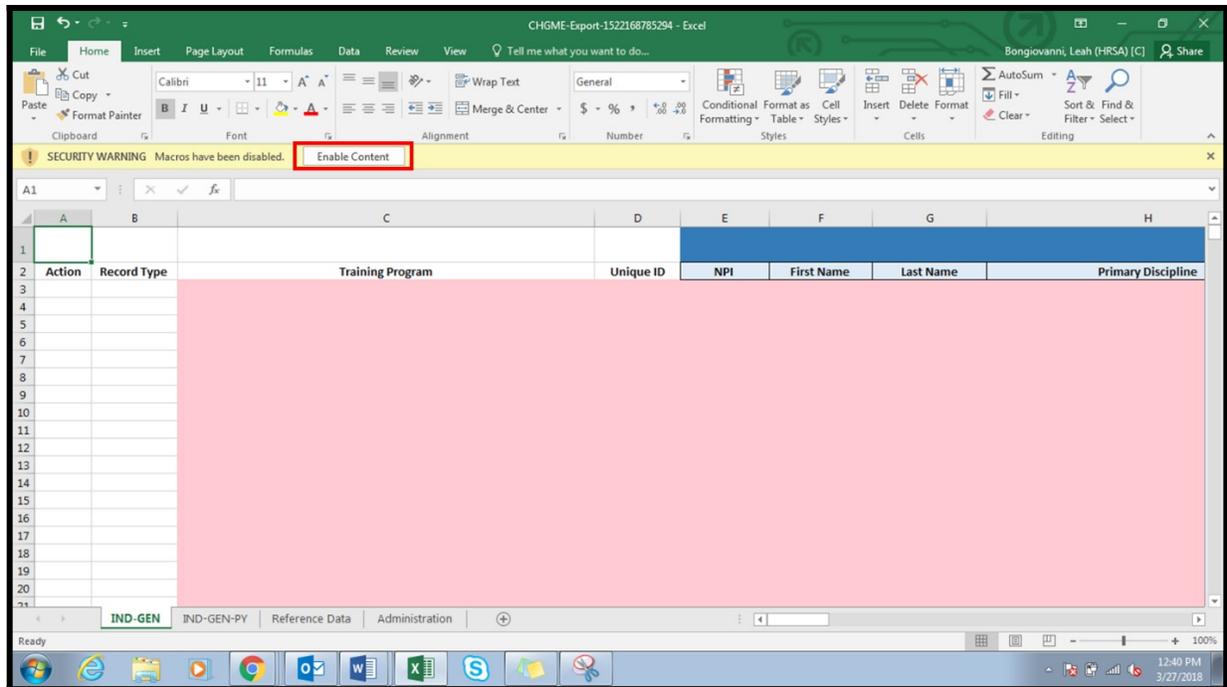


Figure 10. Template - Enable Macros

Once the macros are enabled, the Excel should resemble the image shown below:

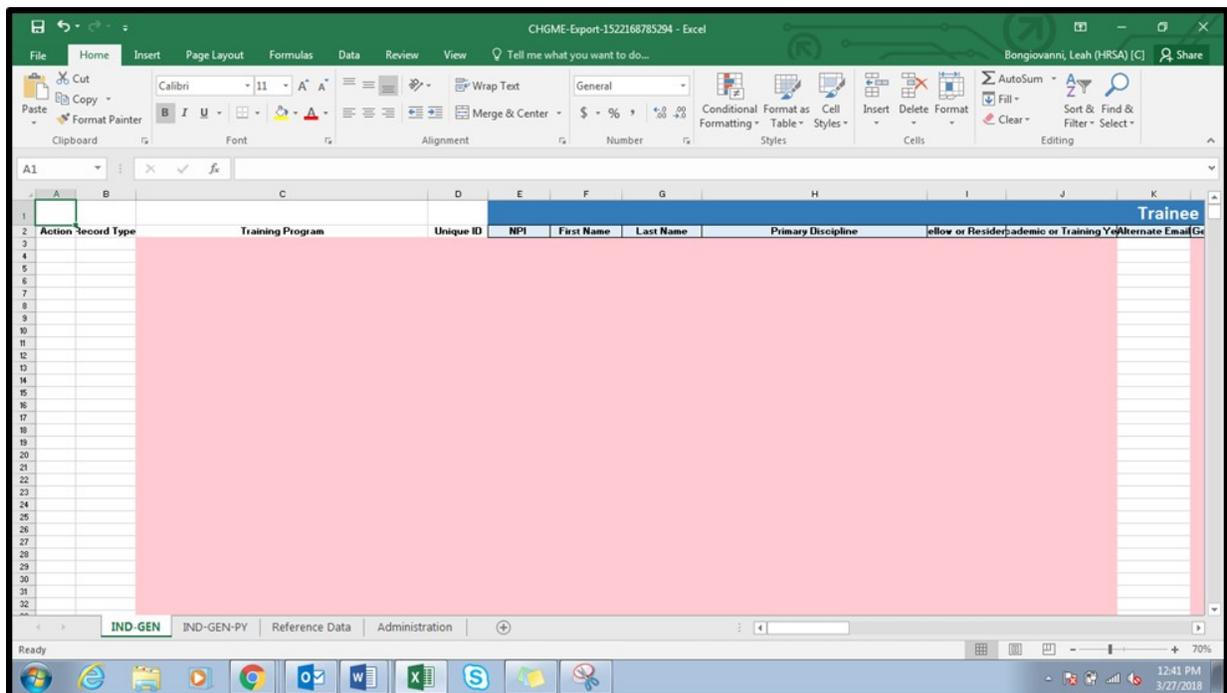


Figure 11. Template - Macros Enabled

2.5 UPLOAD DATA



A user may upload data for a given academic year once the training programs have been started within TRIP; please note that a user must start the training programs prior to uploading data, or the trainee record(s) will not be successfully uploaded. The upload can be performed as many times as necessary to add, delete, or modify data. This data upload can include:

1. A full data set of all trainees and all data
2. A partial data set of any trainees (i.e. full trainee data for a given training program)
3. A partial data set of any trainee data (i.e. trainee unique IDs and emails for the organization)

Once the template has been populated with this data and the user is ready to bulk upload/update trainee records in TRIP, the user should visit the “Upload” page by selecting “Upload Data” on the home page as shown below:



The screenshot displays the HRSA Trainee Information Portal (TRIP) interface. At the top, the header includes the HRSA logo, 'Trainee Information Portal', and the user's name 'CITRUS PRESTOLITE HEALTH CENTER' with a 'Log Out' link. Below the header is a large banner image of a doctor and a child, with a 'Start a New Training Program' button. The main content area is titled 'ACADEMIC YEAR 2017 - 2018' and lists three training programs:

- Pediatric Program**: # FTE Complete: 0, # FTE Total: 0. Buttons: Edit, Manage.
- Fellowship | Pediatric Medical Subspecialties - Pediatric Emergency Medicine**: # FTE Complete: 0, # FTE Total: 0. Buttons: Edit, Manage.
- Fellowship | Other Medical Subspecialties - Neurology - Pediatric Neurology**: # FTE Complete: 0, # FTE Total: 0.02. Buttons: Edit, Manage.

On the right side, there is a sidebar with several buttons: 'Edit Profiles', 'Import All Responses', 'Upload Data' (highlighted with a red box), and 'Download Template'. Below these buttons is a section for 'Archived Programs'. Further down is a 'DASHBOARD' section with three metrics:

- # FTE Complete**: 0.00 (with a checkmark icon)
- Open Training Programs**: 3 (with a pencil icon)
- Days to Due Date**: 146 (with a clock icon)

At the bottom left, there is contact information: 'If you need help, please call 877-Go4-HRSA (877-464-4772) 8am-8pm (EST) Mon-Fri.' At the bottom right is the HRSA logo.

Figure 12. Upload Data Button

From here, the user may select the “Browse” button and browse for a file from their computer. **Please note that this file must be the template provided via TRIP; if it is not, the system will reject the file altogether.**



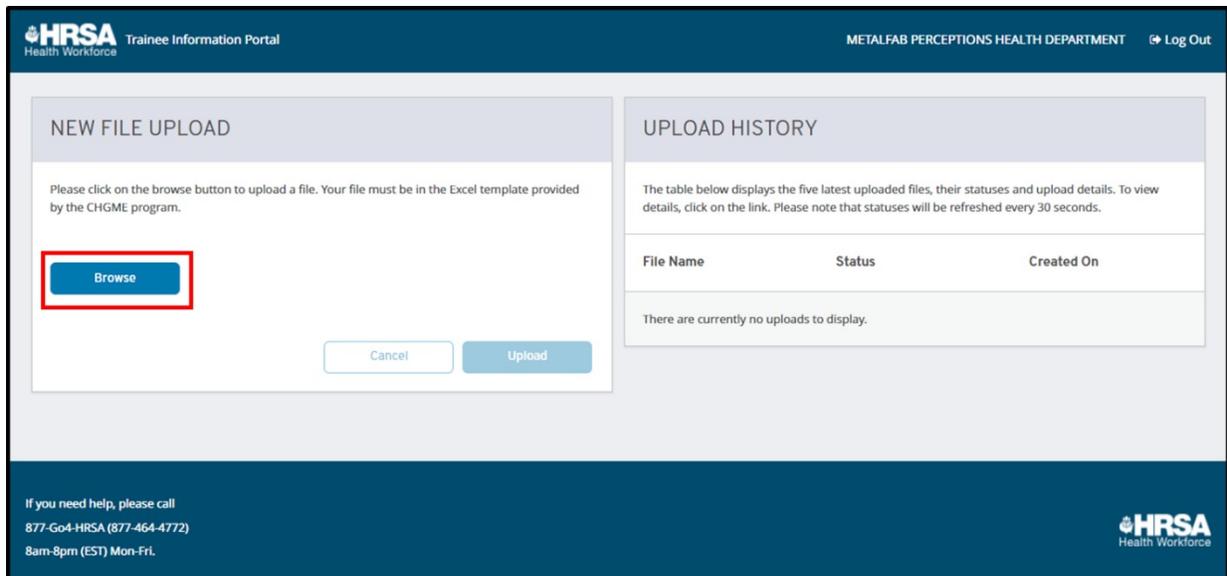


Figure 13. Upload Data

Once the user has chosen a file, they may then select the “Upload” button. This will send the file into the processing queue and it will be displayed in the “Upload History” section on the right hand side of the page, as shown below.

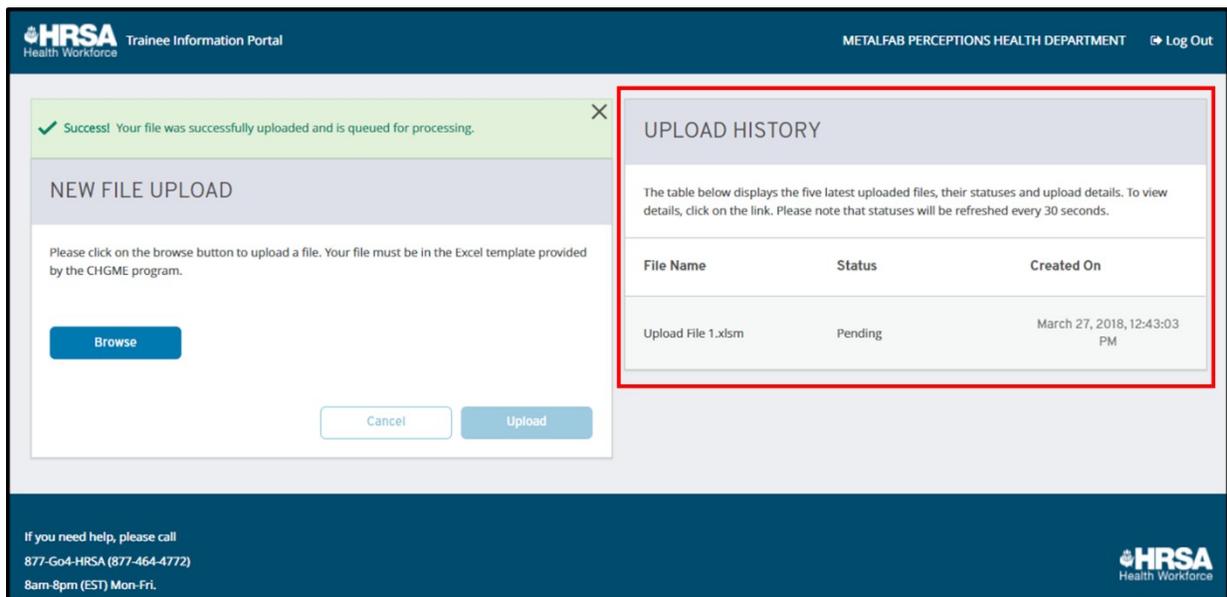


Figure 14. Upload History

The file will remain in 'Pending' status until it has completed processing. Once the file has completed processing, it will be updated with one of three statuses:

1. **Complete:** this means the file and the data contained within were all uploaded successfully.
2. **Complete with Errors:** this means that the file contained some validation errors and not all rows were successfully uploaded.



3. **Error Processing File:** For some reason, the file was unable to upload at this time. The user may try to re-upload the file for a different result.

To display more detail, select the date/time stamp for the relevant file and additional details will be populated in the “Report Detail” section as displayed below.

The screenshot displays the HRSA Trainee Information Portal (TRIP) interface. At the top, a green success message states: "Success! Your file was successfully uploaded and is queued for processing." Below this is a "NEW FILE UPLOAD" dialog box with a "Browse" button and "Cancel" and "Upload" buttons. To the right is the "UPLOAD HISTORY" section, which contains a table of the five latest uploads:

File Name	Status	Created On
Upload File 2.xlsm	Pending	March 27, 2018, 12:43:48 PM
Upload File 1.xlsm	Complete with Errors	March 27, 2018, 12:43:03 PM

Below the table is the "REPORT DETAIL" section, which is highlighted with a red border. It contains the following text:

One or more of your records failed our validation checks. These records were disregarded and will need to be added within the portal or uploaded in the correct format. Please correct the below errors.

▲ Row 3 - Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics) - FO12345
Cannot DELETE. You may not delete prior records or PY records.

0 Record(s) Modified, 0 Record(s) Added, 0 Record(s) Deleted

Figure 15. Report Detail

The “Report Detail” will contain additional information for the statuses ‘Complete’ and ‘Complete with Errors’:

1. Complete: the number of added, modified, and deleted trainees will be displayed.
2. Complete with Errors: the number of added, modified, and deleted trainees will be displayed. Additionally, the section will detail the validation errors encountered during the upload. For each error, the following will be shown:
 - a. Row number: identifying the number of the row in the Excel document where the validation error occurred
 - b. Training program: indicates the training program for the record with an error
 - c. Unique ID: indicates the unique ID for the record with an error
 - d. Field: the field for which the validation error occurred
 - e. Error message: the reason why the field was rejected

For all rows with errors, the entire record is ignored and not updated. Users must correct the fields within the original upload file or a new upload file and re-upload in order to view updated information for the entire record.

2.6 EDIT DATA

Once you have added trainees via upload and/or starting a program, you may begin to edit their IND-GEN or IND-GEN PY data. You may begin editing via three paths in TRIP:



1. Via the home page: select “Edit Profiles” from the right panel to begin editing.

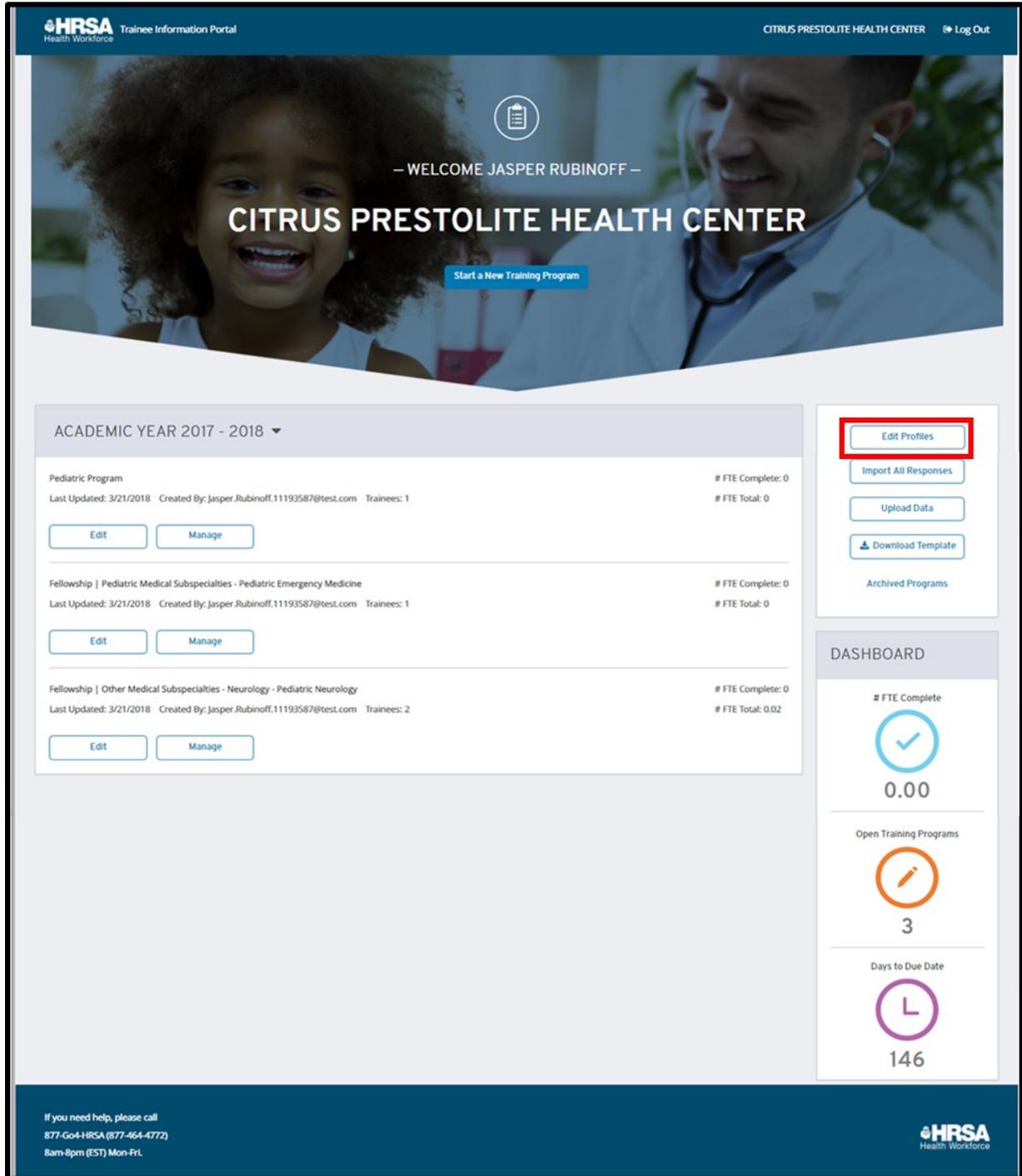


Figure 16. Edit Profiles – Home Page

Once you have arrived at the edit page (shown below), select the training program that you would like to



edit from the left panel to view associated responses.

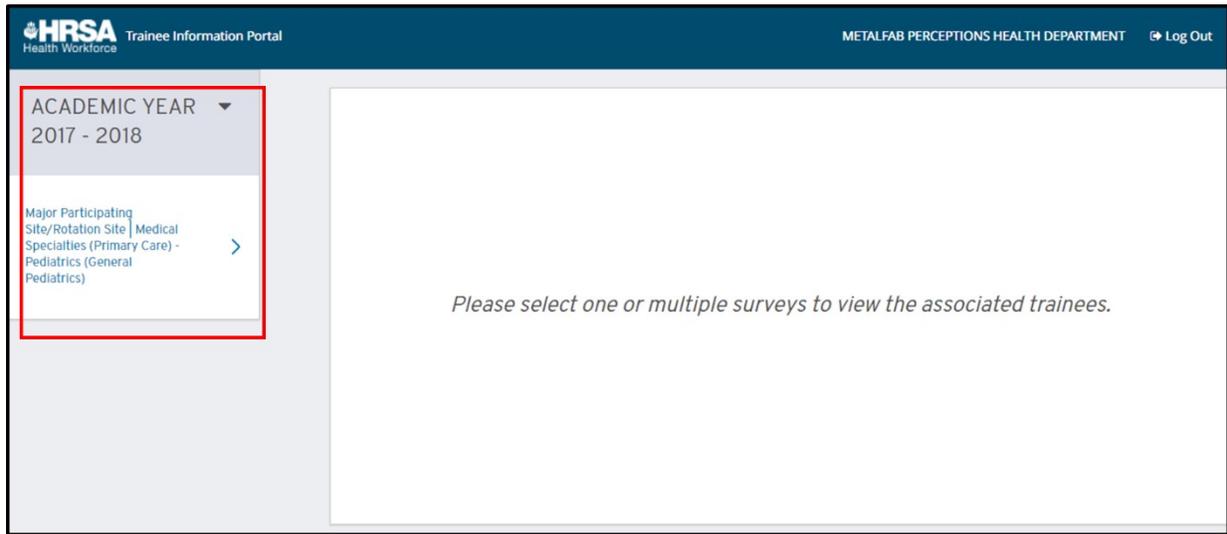


Figure 17. Edit Profiles

2. Via the home page: locate the training program that you wish to edit and select “Edit” as shown below. This will bring you to the “Edit” screen with the selected training program already opened for editing.

HRSA Health Workforce Trainee Information Portal CITRUS PRESTOLITE HEALTH CENTER Log Out

– WELCOME JASPER RUBINOFF –

CITRUS PRESTOLITE HEALTH CENTER

Start a New Training Program

ACADEMIC YEAR 2017 - 2018 ▾

Pediatric Program	# FTE Complete: 0
Last Updated: 3/21/2018 Created By: jasper.rubinoff.11193587@test.com Trainees: 1	# FTE Total: 0
Edit Manage	
Fellowship Pediatric Medical Subspecialties - Pediatric Emergency Medicine	# FTE Complete: 0
Last Updated: 3/21/2018 Created By: jasper.rubinoff.11193587@test.com Trainees: 1	# FTE Total: 0
Edit Manage	
Fellowship Other Medical Subspecialties - Neurology - Pediatric Neurology	# FTE Complete: 0
Last Updated: 3/21/2018 Created By: jasper.rubinoff.11193587@test.com Trainees: 2	# FTE Total: 0.02
Edit Manage	

[Edit Profiles](#)
[Import All Responses](#)
[Upload Data](#)
[Download Template](#)
Archived Programs

DASHBOARD

FTE Complete
0.00

Open Training Programs
3

Days to Due Date
146

If you need help, please call
877-Go4-HRSA (877-464-4772)
8am-8pm (EST) Mon-Fri.

HRSA Health Workforce

Figure 18. Edit Profiles – Training Program Card

3. Via the manage page: From the “Manage” screen, select the “Edit” button as shown below. This will bring you to the “Edit” screen with the selected training program already opened for editing.



HRSA Trainee Information Portal METALFAB PERCEPTIONS HEALTH DEPARTMENT Log Out

Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics)

Academic Year: 2017 - 2018 Last Updated: 3/27/2018 Created By: Aaliyah.Morago.21332534@test.com
 Description: This contains information on trainees in the General Pediatrics program.

TRAINEES (55) Search Trainees Add Trainees

Select Action

Showing 1 - 20 of 55

Record Type	Unique ID	First Name	Last Name	Trainee Program Data	Trainee Profile Data	Post Completion Data	Graduate Follow Up Data	Submitted to EHBs
N	TRAIN01			○	○	○	n/a	
P	Y012345			○	○	○	n/a	
P	AH12345			○	○	○	n/a	
P	AL23456			○	○	○	n/a	
P	AR12345			○	○	○	n/a	
P	AW12345			○	○	○	n/a	
P	BA12345			○	○	○	n/a	
P	BE12345			○	○	○	n/a	
P	BE12345			○	○	○	n/a	
P	BK12345			○	○	○	n/a	
P	BL12345			○	○	○	n/a	
P	BL12345			○	○	○	n/a	
P	DU34567			○	○	○	n/a	
P	EH12345			○	○	○	n/a	
P	FL23456			○	○	○	n/a	
P	FO12345			○	○	●	n/a	
P	GE12345			○	○	○	n/a	

0 Selected

Form complete Form incomplete n/a Form is not required for trainee

DASHBOARD

FTE Complete
0.00

Days to Due Date
140

If you need help, please call
 877-Go4-HRSA (877-464-4772)
 8am-8pm (EST) Mon-Fri.

HRSA Health Workforce

Figure 19. Edit Profiles - Manage Program

In order to edit, you must first select the training program containing the trainees that you would like to edit as mentioned above. Once you have selected the training program, choose a form for editing. You can select a form by choosing one of the four labels pictured below:



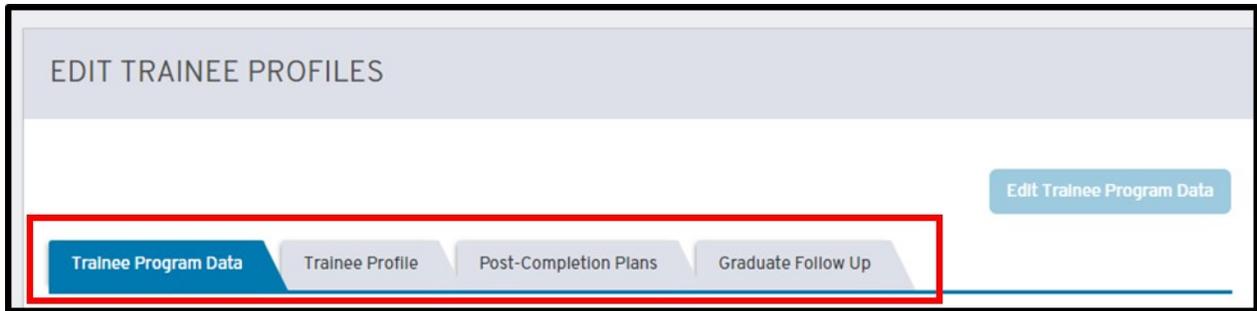


Figure 20. Edit Forms

1. Trainee Program Data

This form is a portion of the IND-GEN form and will be applicable to new records (label: N) and prior records (label: P). It consists of the program-related trainee data fields, including:

- Email
- Percent FTE
- Length of training program (weeks)
- Training in Primary Care Setting
- Primary Care Encounters
- Primary Care Hours
- Training in a Rural Area
- Rural Area Hours
- Training in a MUC
- MUC Hours
- BHW Award
- BHW Award # Years
- Employment/Enrollment Status

The descriptions of these fields are included in the '[TRIP Fields and Descriptions](#)' table in the 'Appendix' section below.

2. Trainee Profile

This form is a portion of the IND-GEN form and will be applicable to new records (label: N) and prior records (label: P). It consists of the trainee's demographic information, including:

- NPI
- First Name
- Last Name
- Primary Discipline
- Fellow or Resident
- Academic or Training Year
- Alternate Email
- Gender
- Year of Birth
- Ethnicity
- Race
- Veteran Status
- International Medical Graduate
- From a rural area
- Disadvantaged background

The descriptions of these fields are included in the '[TRIP Fields and](#)



[Descriptions](#)' table in the 'Appendix' section below.

3. Post Completion Plans

This form is a portion of the IND-GEN form and will be applicable to new records (label: N) and prior records (label: P). It consists of the trainee's plans following the year's completion, including:

- Completed the training program
- Graduated
- Left Program or Still in Training
- Post Graduation/Completion Intentions
- Employed or Receiving Further Training
- Type of Employment
- Employment Zip Code

The descriptions of these fields are included in the '[TRIP Fields and Descriptions](#)' table in the 'Appendix' section below.

4. Graduate Follow Up

This form contains all IND-GEN PY fields and will be applicable to prior year records only (label: PY). It collects data regarding the trainee's plans following program completion, including:

- Currently Employed
- Current Training/Employment
- Hired by your organization
- Hired by a partner organization
- Select employment location

The descriptions of these fields are included in the '[TRIP Fields and Descriptions](#)' table in the 'Appendix' section below.

Once you have selected a form, all applicable trainee records will have selectable radio buttons as shown below.

HRSA Health Workforce Trainee Information Portal METALFAB PERCEPTIONS HEALTH DEPARTMENT Log Out

ACADEMIC YEAR 2017 - 2018

Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics)

Placeholder Program

EDIT TRAINEE PROFILES

Edit Trainee Program Data

Trainee Program Data Trainee Profile Post-Completion Plans Graduate Follow Up

Showing 1 - 4 of 4

Select	Record Type	Unique ID	Email	Employment or Enrollment Status	BHW Award	BHW Award # of Years	Length of Program
<input type="radio"/>	N	TRAIN04					
<input type="radio"/>	N	TRAIN03					
<input type="radio"/>	N	TRAIN02					
<input type="radio"/>	N	TRAIN01					

0 Selected

< Previous 1 Next > 20



Figure 21. Edit - Select Trainee

Select the trainee record you wish to edit. The 'Edit' button will become active once a trainee record is selected, as shown below.

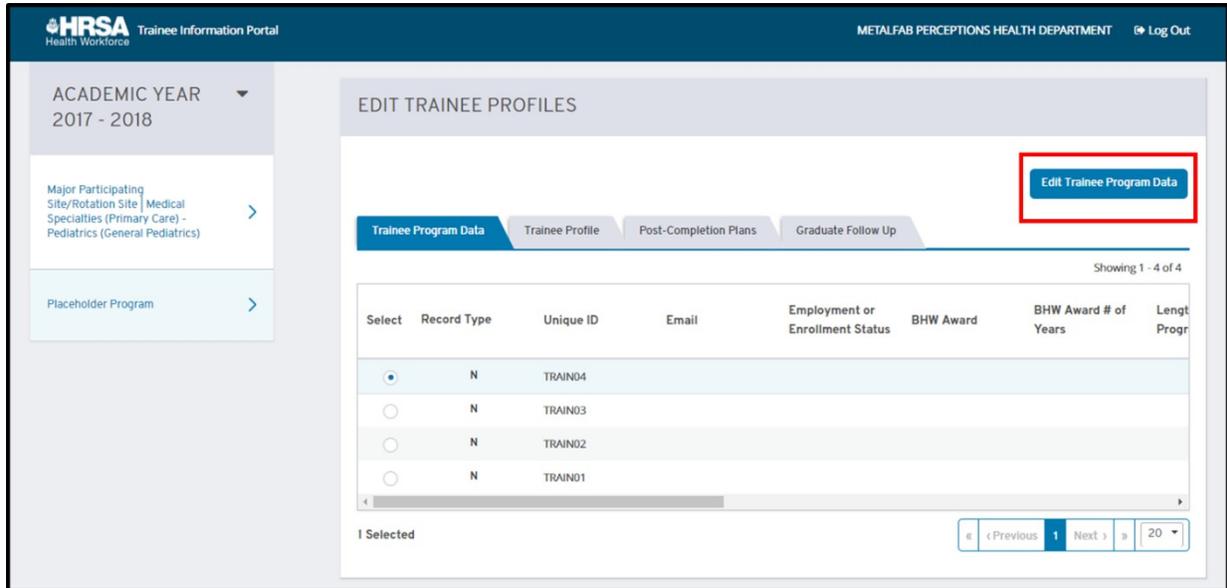


Figure 22. Edit Button

Select the "Edit" button to view the modal in which you may add or change information for the applicable fields. All four edit modals are displayed in the images below.



EDIT ✕

You are about to make edits to trainee TRAIN04. Please select the field and update with new values.

Email	<input type="text" value="Input Here"/>
Employment or Enrollment Status*	<input type="text" value="Select"/>
BHW Award?*	<input type="radio"/> Yes <input type="radio"/> No
BHW Award # of Years	<input type="text" value="Select"/>
Length of Training Program (weeks)	<input type="text" value="Input Here"/>
%FTE	<input type="text" value="Input Here"/>
Training in Primary Care Setting?*	<input type="radio"/> Yes <input type="radio"/> No
Primary Care Hours	<input type="text" value="Input Here"/>

Figure 23. Trainee Program Data Form



EDIT ✕

You are about to make edits to trainee TRAIN04. Please select the field and update with new values.

First Name*

Last Name*

NPI*

Primary Discipline*

Training or Awardee Category* Fellow
 Resident

Academic or Training Year*

Alternate Email

Gender* Female
 Male
 Not reported

Figure 24. Trainee Profile Form



The screenshot shows a modal window titled "EDIT" with a close button (X) in the top right corner. Below the title bar, a message reads: "You are about to make edits to trainee TRAIN04. Please select the field and update with new values." The form contains the following fields:

- Completed the training program***: Radio buttons for Yes and No.
- Graduating**: Radio buttons for Yes and No.
- Post-Graduation or Completion Intentions**: A dropdown menu with "Select all that apply..." as the selected option.
- Employed or Receiving Further Training**: A dropdown menu with "Select" as the selected option.
- Left Program or Still in Training?**: Radio buttons for Left Program and Still in Training.
- Type of Employment**: A dropdown menu with "Select all that apply..." as the selected option.
- Employment Zip Code**: A text input field with "Input Here" as the placeholder.

At the bottom left of the modal, it says "1 Trainee". At the bottom right, there are two buttons: "Save" (in a blue box) and "Cancel" (in a white box with a blue border).

Figure 25. Post Completion Plans Form

Once you have completed your edits, select the "Save" button to apply the changes. If you wish to discard the changes, simply select the "X" button located in the top right corner of the modal. If there are any validation errors, you will not be able to save until the errors are corrected. Errors are indicated by a red outline and message, as shown below:



EDIT [Close]

You are about to make edits to trainee TRAIN04. Please select the field and update with new values.

Email [EMAIL] Please enter a valid email address

Employment or Enrollment Status* Full-time

BHW Award?* Yes No

BHW Award # of Years Select

Length of Training Program (weeks) [1444] Value must be no more than 99

Figure 26. Edit Form Errors

2.7 MANAGE PROGRAM

The manage program page displays key information about a training program.



SECTION A

Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics)

Academic Year: 2017 - 2018 Last Updated: 3/27/2018 Created By: Aaliyah.Morago.21332534@test.com
 Description: This contains information on trainees in the General Pediatrics program.

SECTION B

TRINEES (55) Search Trainees Add Trainees

Record Type	Unique ID	First Name	Last Name	Trainee Program Data	Trainee Profile Data	Post Completion Data	Graduate Follow Up Data	Submitted to EHBs
<input type="checkbox"/>	N	TRAIN01		○	○	○	n/a	
<input type="checkbox"/>	P	Y012345		○	○	○	n/a	
<input type="checkbox"/>	P	AH12345		○	○	○	n/a	
<input type="checkbox"/>	P	AL23456		○	○	○	n/a	
<input type="checkbox"/>	P	AR12345		○	○	○	n/a	
<input type="checkbox"/>	P	AY12345		○	○	○	n/a	
<input type="checkbox"/>	P	BA12345		○	○	○	n/a	
<input type="checkbox"/>	P	BE12345		○	○	○	n/a	
<input type="checkbox"/>	P	BK12345		○	○	○	n/a	
<input type="checkbox"/>	P	BL12345		○	○	○	n/a	
<input type="checkbox"/>	P	BT12345		○	○	○	n/a	
<input type="checkbox"/>	P	DU34567		○	○	○	n/a	
<input type="checkbox"/>	P	EH12345		○	○	○	n/a	
<input type="checkbox"/>	P	FL23456		○	○	○	n/a	
<input type="checkbox"/>	P	FO12345		○	○	✓	n/a	
<input type="checkbox"/>	P	GE12345		○	○	○	n/a	

0 Selected

Form complete (✓) Form incomplete (○) n/a Form is not required for trainee

SECTION C

Edit Trainee Profiles
 Delete Training Program

SECTION D

DASHBOARD

FTE Complete: 0.00
 Days to Due Date: 140

Figure 27. Manage Program

As you can see in section A above, the top portion of the screen displays the name of the training program, academic year, and description as entered in the start program process. Section B displays the full list of trainees in a table, including several columns to display further information. These columns include:

- 1. Record Type** This is a column to indicate the record type for the given trainee. This will be one of three values:



- New Record: a record that is added to the training program this year and is being reported on the IND-GEN for the first time
- Prior Record: a record that was reported on the IND-GEN for that given training program in the previous year, but did not complete the program
- PY Record: a record that was reported on the IND-GEN for that given training program in the previous year, but did complete the program and is now required to be reported on the IND-GEN PY form

- 2. Trainee Unique ID** This is the seven character alphanumeric identifier used for a given trainee.
- 3. Trainee Name** This field is a combination of the first and last name, if available, for a given trainee. This information is entered via the upload or edit portions of TRIP. Ideally, this will make it easier to identify a trainee within the table.
- 4. Trainee Program Data Form Status** This column indicates if a trainee has completed all required fields for the 'Trainee Program Data' form. As the legend shows at the bottom of the screen, you may have three possible indicators here: green (form is complete), yellow (form is incomplete), or n/a (form is not applicable to the trainee).
- 5. Trainee Profile Form Status** This column indicates if a trainee has completed all required fields for the 'Trainee Profile' form. As the legend shows at the bottom of the screen, you may have three possible indicators here: green (form is complete), yellow (form is incomplete), or n/a (form is not applicable to the trainee).
- 6. Post Completion Plans Form Status** This column indicates if a trainee has completed all required fields for the 'Post Completion Plans' form. As the legend shows at the bottom of the screen, you may have three possible indicators here: green (form is complete), yellow (form is incomplete), or n/a (form is not applicable to the trainee).
- 7. Graduate Follow Up Form Status** This column indicates if a trainee has a complete 'Trainee Program Data' form has completed all required fields. As the legend shows at the bottom of the screen, you may have three possible indicators here: green (form is complete), yellow (form is incomplete), or n/a (form is not applicable to the trainee).
- 8. Submitted to EHB** If a trainee response has been submitted to EHBs, the most recent submission date will be displayed in this column. If this column is blank, the trainee has not yet been submitted to EHBs.

This section also includes buttons to add trainees, delete trainees, and search trainees, which are further detailed in the corresponding sections below.

Section C displays the action panel on the manage program page. From here, you can select the "Edit Profiles" button to edit trainees for the given program. If the program is a placeholder program, you may select "Link Training Program" to associate the placeholder with a valid program that is set to 'Active' in EHBs. Lastly, you may select "Delete Training Program" to permanently delete the program and associated responses from TRIP. This functionality is further detailed in the corresponding sections below.

Section D includes a dashboard, similar to that of the home page. The dashboard includes:

- 1. #FTE Complete** This number indicates the number of FTE complete for a given program. This number is calculated by the sum of the number FTE for the given trainees who have an overall status of complete, meaning that all applicable forms have all



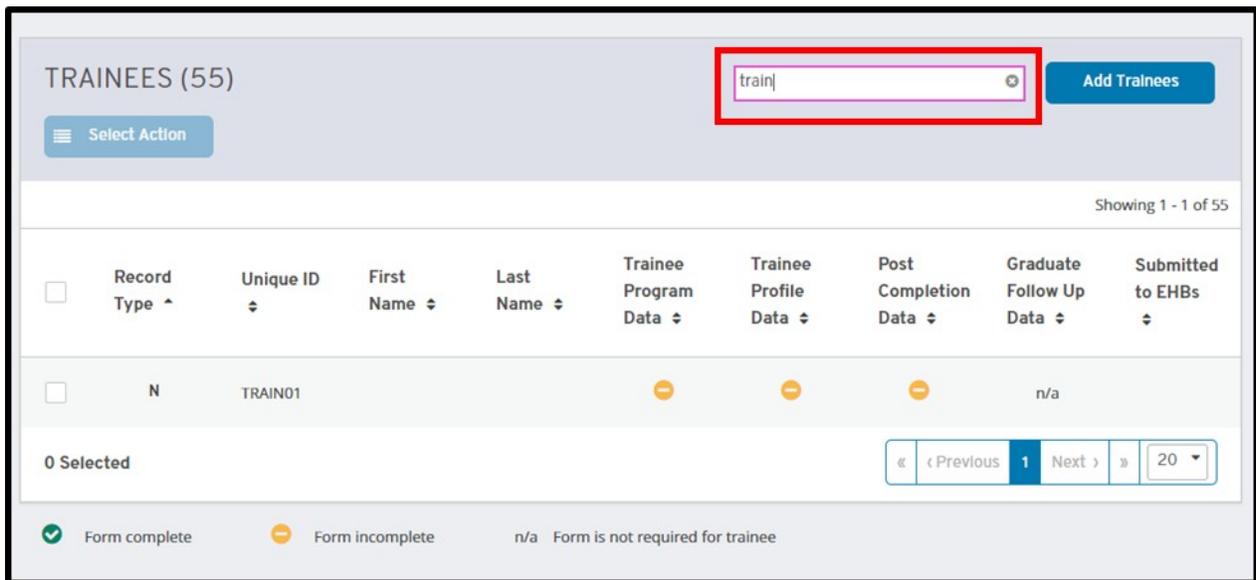
required fields complete.

2. Days to Due Date

This is the number of days remaining before TRIP closes for the given academic year and the responses must be submitted to EHBs.

2.8 SEARCH TRAINEES

To enable users to more easily find trainee records within the trainee table on the 'Manage Program' page, a search bar has been implemented. To search, begin typing the letters for a trainee's unique ID, first name, or last name. The table results will be narrowed to show only matching results, as shown below.



The screenshot displays the 'TRAINEES (55)' interface. At the top right, there is a search bar containing the text 'train' and an 'Add Trainees' button. Below the search bar is a table with the following columns: Record Type, Unique ID, First Name, Last Name, Trainee Program Data, Trainee Profile Data, Post Completion Data, Graduate Follow Up Data, and Submitted to EHBs. The first row of data shows 'N' for Record Type, 'TRAIN01' for Unique ID, and 'n/a' for Graduate Follow Up Data. The table also includes a legend at the bottom: a green checkmark for 'Form complete', a yellow minus sign for 'Form incomplete', and 'n/a' for 'Form is not required for trainee'. A pagination bar at the bottom right shows 'Showing 1 - 1 of 55' and a page number '1'.

Figure 28. Search Trainees

2.9 ADD TRAINEES

Trainees may be added to a training program via the 'Manage Program' page. To begin the process, select the "Add Trainees" button as shown below.



The screenshot displays the HRSA Trainee Information Portal (TRIP) interface. At the top, the header includes the HRSA logo, 'Trainee Information Portal', and 'METALFAB PERCEPTIONS HEALTH DEPARTMENT' with a 'Log Out' link. The main title is 'Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics)'. Below this, there is an information bar with an 'i' icon, 'Academic Year: 2017 - 2018', 'Last Updated: 3/27/2018', 'Created By: Aaliyah.Morago.21332534@test.com', and a description: 'Description: This contains information on trainees in the General Pediatrics program.'

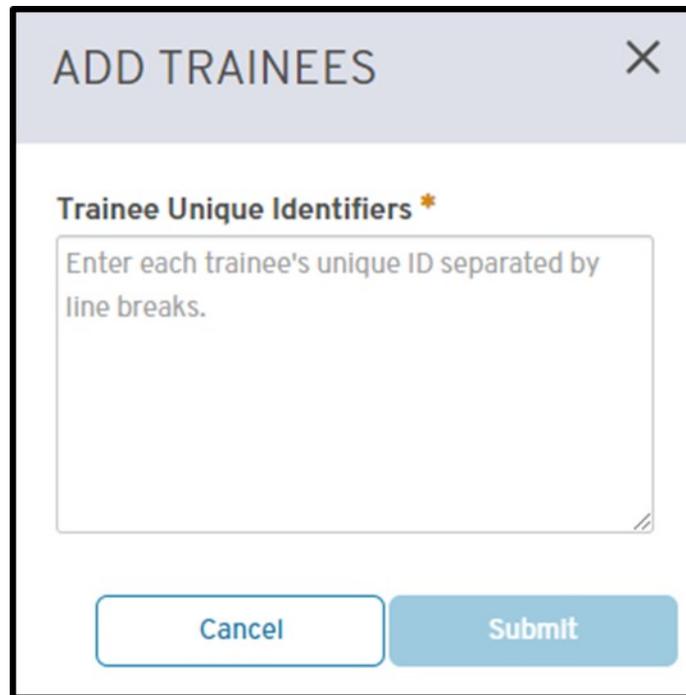
The main content area is titled 'TRAINEES (55)' and features a search bar labeled 'Search Trainees' and a blue 'Add Trainees' button, which is highlighted with a red rectangular box. To the right of the search bar are buttons for 'Edit Trainee Profiles' and 'Delete Training Program'. Below the search bar is a 'Select Action' button. The table below shows a list of trainees with columns for Record Type, Unique ID, First Name, Last Name, Trainee Program Data, Trainee Profile Data, Post Completion Data, Graduate Follow Up Data, and Submitted to EHBs. The table shows 15 rows of data, with the first row having a unique ID of TRAIN01 and the last row having a unique ID of GE12345. The 'Submitted to EHBs' column shows 'n/a' for most rows, but a green checkmark is visible in the row for FO12345. At the bottom of the table, there is a legend: a green checkmark for 'Form complete', an orange circle for 'Form incomplete', and 'n/a' for 'Form is not required for trainee'. A pagination bar at the bottom of the table shows '0 Selected' and navigation buttons for 'Previous', '1', '2', '3', 'Next', and '20'.

On the right side of the interface, there is a 'DASHBOARD' section with two metrics: '# FTE Complete' with a value of '0.00' and 'Days to Due Date' with a value of '140'. The dashboard also includes a 'Log Out' button at the top right and an HRSA logo at the bottom right.

Figure 29. Manage Program – Add Trainees Button

This will open a modal where the user may enter unique IDs separated by line breaks. The unique ID must be seven alphanumeric characters, as established by EHBs. Once the user has entered all the unique IDs that they wish to add, they can select the “Submit” button.





ADD TRAINEES [Close]

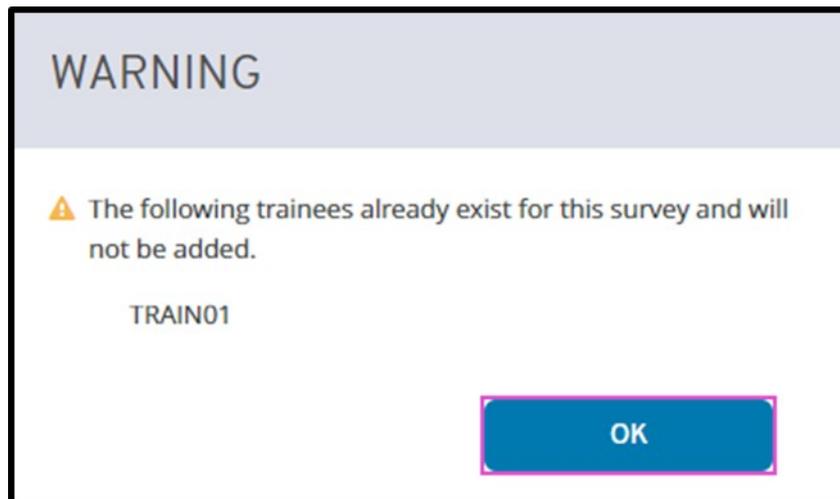
Trainee Unique Identifiers *

Enter each trainee's unique ID separated by line breaks.

[Cancel] [Submit]

Figure 30. Add Trainees

At this time, users will be notified if they are trying to add any duplicate records. These are unique IDs that are either already in the training program or were reported on the previous year's IND-GEN form that will be brought in automatically when available from EHBs. Users will be notified of this and the duplicate record will not be added.



WARNING

⚠ The following trainees already exist for this survey and will not be added.

TRAIN01

[OK]

Figure 31. Add Trainee Error

If the records are added successfully, the modal is closed and the user is returned to the 'Manage Program' page.

2.10 DELETE TRAINEES



Trainee records may also be deleted from a training program. To delete a trainee record(s), select the checkbox next to the trainee(s) you would like to delete. Once a checkbox has been selected, the “Select Action” dropdown will become active, as shown below.

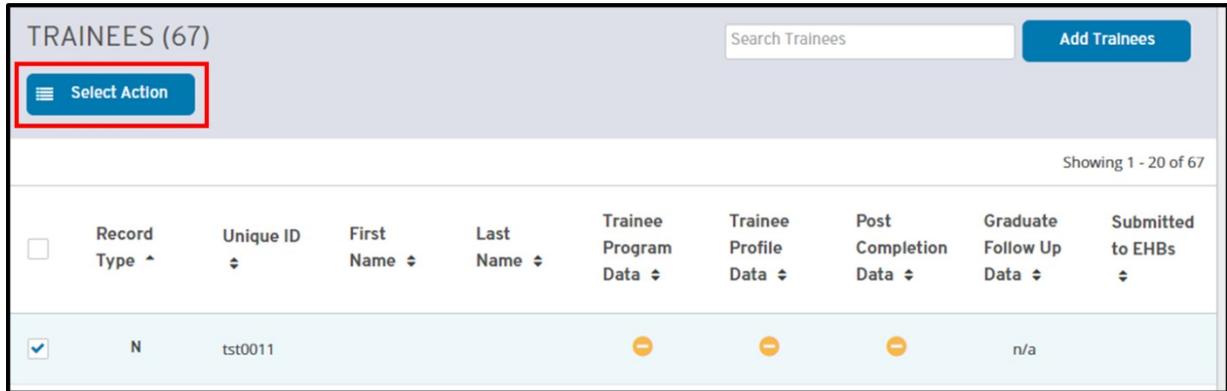


Figure 32. Manage Program – Select Action Dropdown

The user will then open the dropdown and select “Delete Response”.

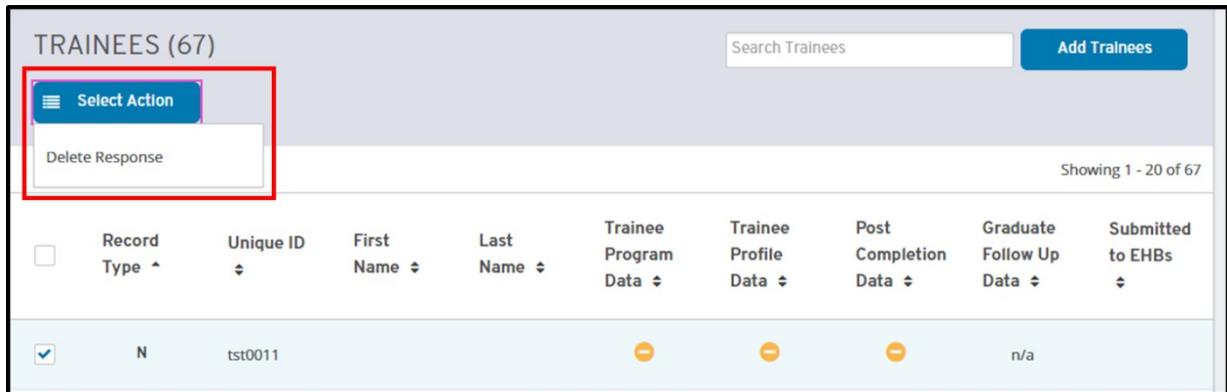


Figure 33. Delete Response Button

This will open a modal summarizing the trainee record(s) to be deleted. To move forward with the deletion, select “Delete”; to cancel the deletion, press “Cancel”. **Please note that deleting a trainee is a permanent action and their data cannot be retrieved after deletion.**



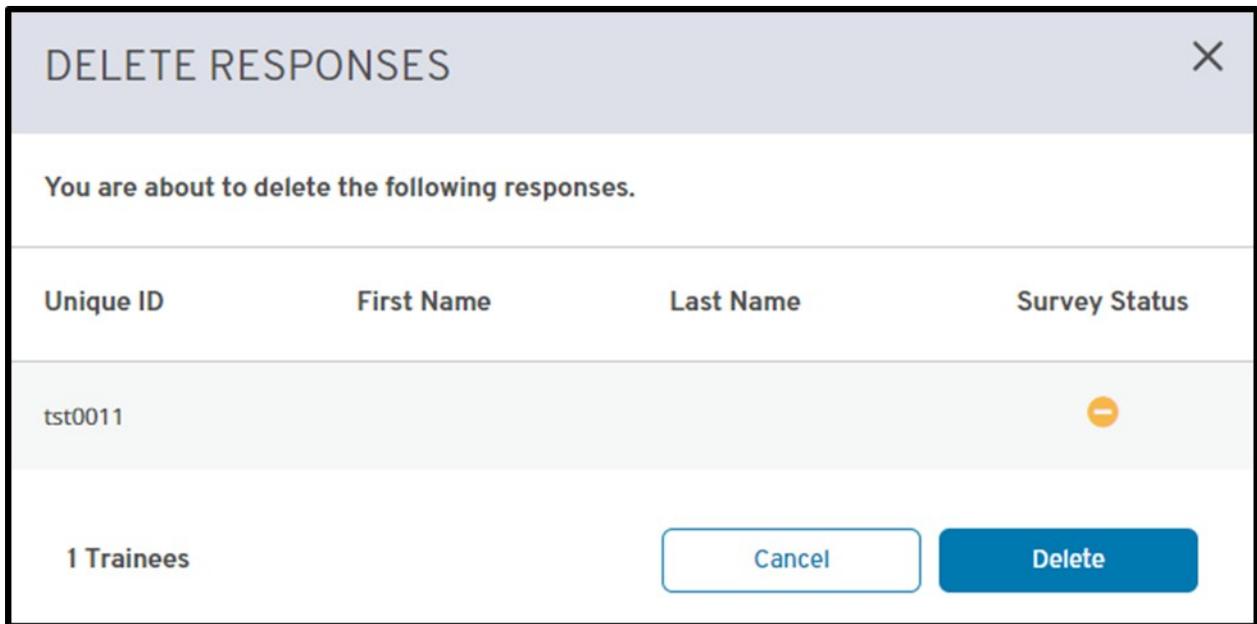


Figure 34. Delete Response Modal

2.11 DELETE PROGRAM

If a program was created in error or as a duplicate, users may delete the entire training program and associated responses from TRIP. To perform this action, users will select the “Delete Training Program” button within the action panel on the ‘Manage Program’ page as shown below.



The screenshot displays the HRSA Trainee Information Portal (TRIP) interface. At the top, it identifies the user as 'METALFAB PERCEPTIONS HEALTH DEPARTMENT' and provides a 'Log Out' option. The main heading is 'Major Participating Site/Rotation Site | Medical Specialties (Primary Care) - Pediatrics (General Pediatrics)'. Below this, it shows the 'Academic Year: 2017 - 2018', 'Last Updated: 3/27/2018', and 'Created By: Aaliyah.Morago.21332534@test.com'. A description states: 'Description: This contains information on trainees in the General Pediatrics program.'

The main content area is titled 'TRAINEES (55)' and includes a search bar and an 'Add Trainees' button. A 'Select Action' dropdown menu is visible. The trainees are listed in a table with the following columns: Record Type, Unique ID, First Name, Last Name, Trainee Program Data, Trainee Profile Data, Post Completion Data, Graduate Follow Up Data, and Submitted to EHBs. The table shows 15 rows of trainees, with the last row (GE12345) having a green checkmark in the 'Post Completion Data' column. A legend at the bottom indicates: green checkmark for 'Form complete', orange circle for 'Form incomplete', and 'n/a' for 'Form is not required for trainee'.

On the right side, there is a 'DASHBOARD' section with two metrics: '# FTE Complete' (0.00) and 'Days to Due Date' (140). Above the dashboard, there are buttons for 'Edit Trainee Profiles' and 'Delete Training Program', with the latter being highlighted in a red box.

Figure 35. Delete Program Button

This will open a modal asking the user to confirm if they wish to delete the training program. To move forward with the deletion, select “OK”; to cancel the deletion, press “Cancel”. **Please note that deleting a training program removes all data associated with the program, including all trainee responses. This is a permanent action and the data cannot be retrieved after deletion.**



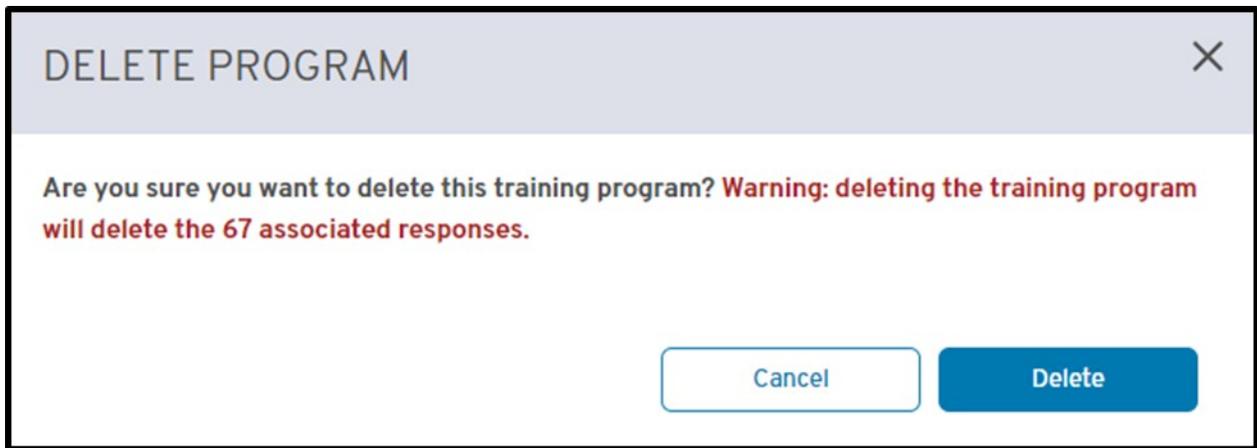


Figure 36. Delete Program Modal

If the program is successfully deleted, the user will be returned to the home page.

2.12 LINK PROGRAM

Placeholder programs, as discussed in the 'Start Training Program' section, must be linked to EHBs training programs prior to submitting data. If they are not linked, the data will not be submitted to EHBs.

In order to link a training program, the program must first be set up within EHBs and set to 'Active'. Refer to the EHBS user manual to accomplish this task.

Once the program is set to Active for the given academic year, users should return to TRIP and access the 'Manage Program' page for the placeholder program. The user will then locate the "Link Training Program" button in the right panel as shown below.



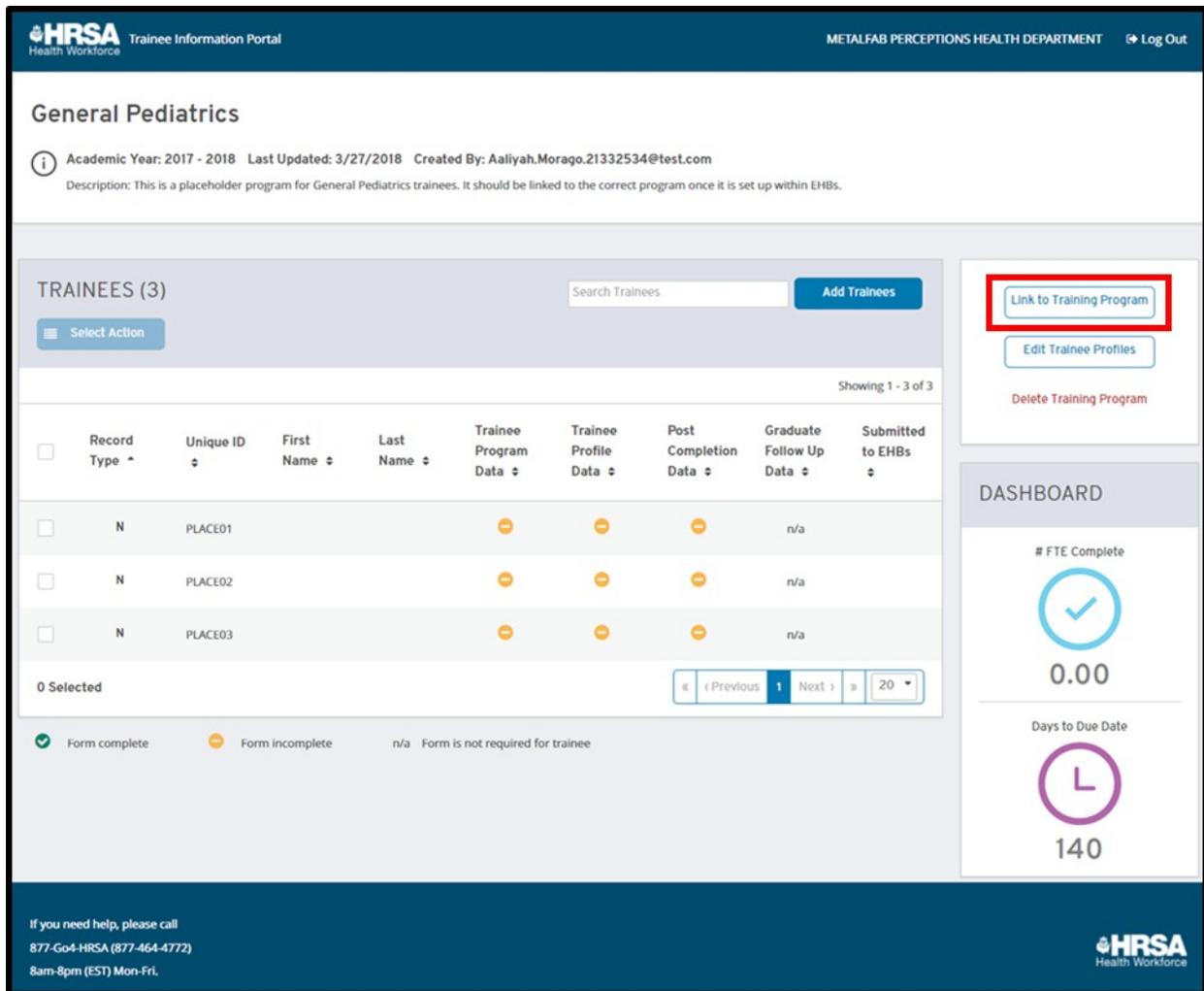


Figure 37. Link Program Button

To link the training program, users should select this button to open the modal shown below. This modal asks the user to select a training program from a dropdown list. This list contains all programs that are active in EHBs for the given year that are not already being used for data collection in TRIP.

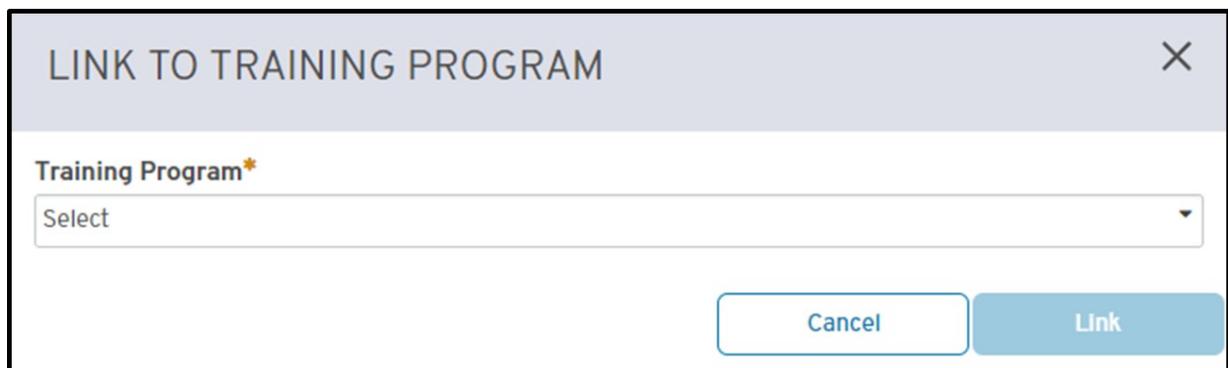


Figure 38. Link Program Modal



Once a user has selected the correct training program, they can select “Link” and the training program name will be updated. To exit the process without linking the program, select “Cancel”.

2.13 IMPORT TO EHB

Once all data has been collected for the academic year, the user may import the data to EHBs. Please note that we recommend only one individual per organization import data, and that this action be performed at the end of the TRIP reporting period to ensure data integrity between TRIP and EHBs; however, users may import data to EHBs at any time once the ‘Import’ button is active. This functionality will become available once the reporting forms have been created in EHBs.

If information is updated after the initial import, users may re-import their data to EHBs. This will overwrite the data previously imported to EHBs for the selected trainee records. However, if a user wishes to delete a record that has already been imported to EHBs, they will have to delete the record within the EHBs application.

Please note that users must still submit their full reporting forms within EHBs. Importing to EHBs from TRIP does not fulfill reporting obligations.

In order to import data, locate the “Import to EHBs” button on the home page as shown below.



HRSA Health Workforce Trainee Information Portal

CITRUS PRESTOLITE HEALTH CENTER Log Out

– WELCOME JASPER RUBINOFF –

CITRUS PRESTOLITE HEALTH CENTER

Start a New Training Program

ACADEMIC YEAR 2017 - 2018

Program Name	# FTE Complete	# FTE Total
Pediatric Program Last Updated: 3/21/2018 Created By: Jasper.Rubinoff.11193587@test.com Trainees: 1	0	0
Fellowship Pediatric Medical Subspecialties - Pediatric Emergency Medicine Last Updated: 3/21/2018 Created By: Jasper.Rubinoff.11193587@test.com Trainees: 1	0	0
Fellowship Other Medical Subspecialties - Neurology - Pediatric Neurology Last Updated: 3/21/2018 Created By: Jasper.Rubinoff.11193587@test.com Trainees: 2	0	0.02

Buttons: Edit, Manage

Buttons: Edit Profiles, **Import All Responses**, Upload Data, Download Template

Archived Programs

DASHBOARD

- # FTE Complete: 0.00
- Open Training Programs: 3
- Days to Due Date: 146

If you need help, please call
877-Go4-HRSA (877-464-4772)
8am-8pm (EST) Mon-Fri.

HRSA Health Workforce

Figure 39. Import to EHBs Button

Selecting this button will open the modal shown below.



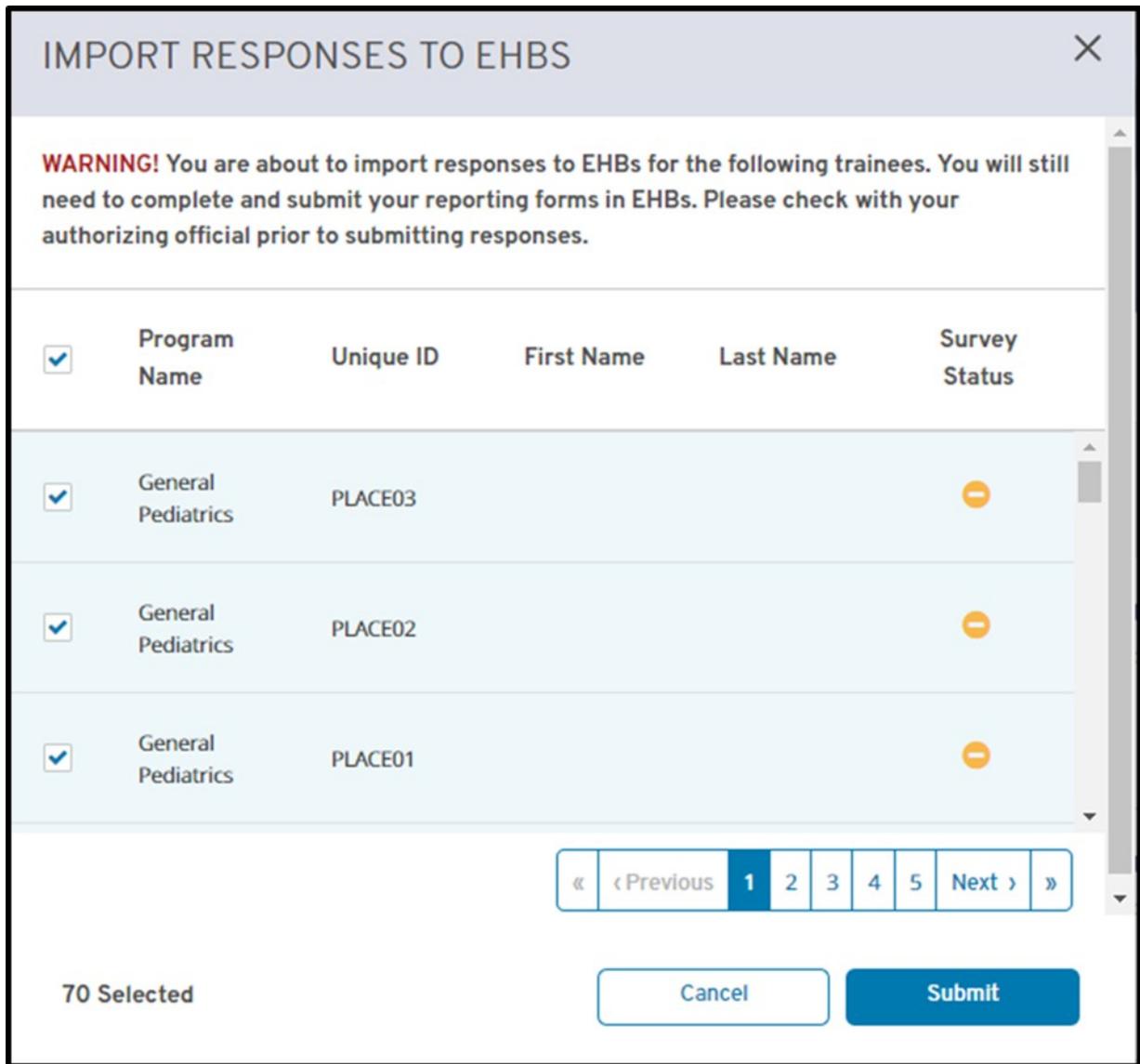


Figure 40. Import to EHBs Modal

This modal lists all trainees for all training programs for the organization. The following information is displayed:

- 1. Trainee Unique ID** This is the seven character alphanumeric identifier used for a given trainee.
- 2. Trainee Name** This field is a combination of the first and last name, if available, for a given trainee. This information would be entered via the upload or edit portions of TRIP. Ideally, this will make it easier to identify a trainee within the table.
- 3. Overall Form Status** This indicates the trainee's overall form status in the portal, referencing whether or not all of their IND-GEN or IND-GEN PY form fields are complete. A green icon indicates that all required fields have been completed; a yellow icon indicates that there are missing required fields.
- 4. Training Program** The relevant training program for each trainee is displayed to help users identify the correct individual.



Each trainee has a checkbox next to their row; all checkboxes are selected by default. Users may deselect any individuals that they do not wish to import to EHBs.

Once the user has confirmed the users that they wish to import, they may select the “Import” button. To exit the process at any time, the user may select “Cancel”.

If the import is successfully sent to EHB, the user is returned to the home page. There are several errors that may occur while importing:

1. TRAINING PROGRAM IS NOT ACTIVE IN EHBS

If any of the training programs being imported to EHBs are not listed as ‘Active’ in EHB, the user will not be able to submit the associated data. To correct this error, users must update the training program setup form in EHBS to show the training program(s) as active. Once this has been corrected, users may resend data from TRIP to EHB.

2. TRAINING PROGRAM IS NOT LINKED TO AN ACTIVE TRAINING PROGRAM

Users are not able to send trainee records associated with a placeholder programs to EHBs; all programs must be linked to active EHBS training programs prior to submission. To correct this error, users must link the training program in error. Refer to [‘Link Program’](#) section above.

3. FORMS ARE SUBMITTED IN EHBS

If an organization has already submitted their reporting forms in EHBs, TRIP cannot submit additional data. There is no way to correct this error. If a user wishes to obtain the data in TRIP to retain for their own records, they may download the populated template prior to the end of the TRIP reporting period.

3.FREQUENTLY ASKED QUESTIONS (FAQS)



4. APPENDIX

TRIP FIELDS AND DESCRIPTIONS

TRIP collects various fields, many of which are also on the IND-GEN and IND-GEN PY forms. See below for a full list of the fields as well as guidance for what they mean and how to answer them.

- 1. Action** In order to add, delete, or modify a record, users must indicate which action they would like to take. Users may add new records, delete new records, or modify new, prior, and PY records. When adding a record for the first time, users should select “Add”. When updating an existing record, users should select “Modify”. When removing an invalid record, users should select “Delete”.
Please note that you will not be able to add or delete prior records or PY records.
- 2. Record Type** This is a read-only column to indicate the record type for the given trainee. This will be one of three values:
 - New Record: a record that is newly added to the training program in the given academic year and is being reported on the IND-GEN for the first time
 - Prior Record: a record that was reported on the IND-GEN for that given training program in the previous year, but did not complete the program
 - PY Record: a record that was reported on the IND-GEN for that given training program in the previous year, but did complete the program and is now required to be reported on the IND-GEN PY form
- 3. Training Program** Users should indicate the training program for a given trainee in this row. Please note that this field is populated only by the training programs open for data collection within the portal; you will not be able to upload to a training program that has not been started.
This field is read-only for prior records and PY records.
- 4. Unique ID** This is the seven character alphanumeric identifier used for a given trainee.
- 5. NPI** This is the National Provider Identifier (NPI) number, used to identify a trainee and their medical license.
- 6. First Name** The first name of the trainee should be entered into this column; please note that this is meant to facilitate user tracking of the trainees, and will not be sent to EHB.
- 7. Last Name** The last name of the trainee should be entered into this column; please note that this is meant to facilitate user tracking of the trainees, and will not be sent to EHB.
- 8. Primary Discipline** This is the primary discipline for the given trainee and must be selected from the dropdown field.
- 9. Fellow or Resident** This is the trainee or awardee category for the trainee. All trainees in a fellowship program must be listed as a fellow; all trainees in a residency program must be listed as a resident. For major participating sites/rotational programs, trainees may be either fellows or residents.
- 10. Academic or Training** This indicates the trainee’s training year during their participation in the training



Year	program for the given academic year.
11. Alternate Email	This is the alternate email on file for the trainee.
12. Gender	This indicates the trainee's gender. If the trainee has not reported their gender, the user may enter "Not Reported".
13. Year of Birth	This indicates the trainee's year of birth; if the trainee has not reported their ethnicity, the user may enter "Not Reported".
14. Ethnicity	This indicates the trainee's ethnicity; if the trainee has not reported their ethnicity, the user may enter "Not Reported".
15. Race	This indicates the trainee's race; the user may select all values that apply. "Not Reported" may not be selected in combination with any other option.
16. Veteran Status	This indicates the trainee's veteran status during their participation in the training program.
17. International Medical Graduate	This indicates if the trainee is an International Medical Graduate (IMG) or not.
18. Rural Area	This indicates if a trainee is from a rural residential background.
19. Disadvantaged Background	This indicates if a trainee is from a disadvantaged background.
20. Email	This is the primary email on file for the trainee.
21. Percent FTE	This indicates the percent FTE covered by the HRSA CHGME grant funding. This field is only editable if "BHW Award" is set to "Yes". Please enter the percent as a whole number; for example, if 50% of the individual's FTE is covered by CHGME funding, enter "50" in this field.
22. Length of Training Program (weeks)	This indicates the length of the trainee's training program in number of weeks. For example, if the trainee participated in the program for 10 weeks, "10" should be entered in this field. This will auto-calculate the "Percent FTE" field; users may update the "Percent FTE" if it does not accurately represent the trainee's value.
23. Training in Primary Care Setting	This indicates if a trainee has received clinical or experiential training in a primary care setting during the current reporting period.
24. Primary Care Encounters	This indicates the total number of patient encounters in a primary care setting during the reporting period. Note that this is only editable if "Training in a Primary Care Setting" is set to "Yes".
25. Primary Care Hours	This indicates the total number of hours spent in a primary care setting during the reporting period. Note that this is only editable if "Training in a Primary Care Setting" is set to "Yes".
26. Training in MUC Setting	This indicates if a trainee has received clinical or experiential training in a medically-underserved community (MUC) during the current reporting period.



27. MUC Hours	This indicates the total number of hours spent in a medically-underserved community (MUC) during the reporting period. Note that this is only editable if “Training in a MUC Setting” is set to “Yes”.
28. Training in Rural Area	This indicates if a trainee has received clinical or experiential training in a rural area during the current reporting period.
29. Rural Hours	This indicates the total number of hours spent in a rural area during the reporting period. Note that this is only editable if “Training in a Rural Area” is set to “Yes”.
30. BHW Award	This indicates if the trainee received a BHW-funded financial award, such as salary and/or benefits, during the given reporting period. Note that this field must be yes for new trainee records.
31. BHW Award # Years	This indicates the number of years for which the individual has received a BHW-funded financial award. This number does not need to be consecutive; the cumulative total of the number of years should be reported. If an individual has received funding for a partial academic year, please round up to the nearest whole number. Note that this field must not be “0” for new trainee records.
32. Employment/ Enrollment Status	This is the trainee’s employment status during their participation in the training program. Note that new trainee records cannot be listed as “Inactive” or “On leave of absence”.
33. Completed training program	This indicates if the trainee completed the training program during the current reporting period.
34. Graduated at end of academic year	This indicates if the trainee graduated (or will graduate by the end of the academic year) during the current reporting period.
35. Left program or still in training	This indicates if the trainee permanently left the training program before completion during the current reporting period. If the trainee has not left the program, this should be answered as “Still in training”.
36. Post-Graduation/ Completion Intentions	This indicates the trainee’s intentions following completion of the training program. Users may select all that apply. Note that “Not Reported”, “None of the Above”, and “N/A” may not be selected in conjunction with any other options.
37. Employed or Receiving Further Training	This indicates if the trainee is currently employed or receiving further training following completion of the training program.
38. Type of Employment	This indicates the trainee’s type of employment following completion of the training program. Users may select all that apply. Note that “Not Reported”, “None of the Above”, and “N/A” may not be selected in conjunction with any other options.
39. Employment Zip Code	This indicates the zip code of the location of the trainee’s employment or training. This must be entered as a 5-digit number.
40. Currently Employed	This indicates if the trainee is employed (and employment data is known) following completion of the training program.
41. Current Training/ Employment Status	This indicates the trainee’s current training/employment status following



Employment

completion of the training program. Users may select all that apply. Note that “None of the Above” and “N/A” may not be selected in conjunction with any other options.

42. Hired by your organization

This indicates if the grantee organization hired the trainee following training program completion.

43. Hired by a partner organization

This indicates if a partner organization of the grantee organization hired the trainee following training program completion.

44. Employment Location

This indicates the trainee’s type of employment location.

