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BHW Management Information System Solution(BMISS)

National Health Service Corps (NHSC)
Loan Repayment Program (LRP)

FY 2019 Review User Guide
March 2019

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Introduction: NHSC LRP Review User Guide

Goal: This user guide explains all the functionality available to a NHSC LRP Analyst in order to review NHSC LRP applications. The functionality includes:

- Applicant Banner
- Application Profile
- Withdraw, Discontinue Review and Whitelist
- Alerts
- Review Planning Screens: Start Review, Recommence Review and Pending EV
- Step 1 of Review: Document Review and Eligibility
- Step 2 of Review: Verification Review
- Step 3.A of Review: Exception Review
- Step 3.B of Review: Quality Review
- Ineligible/Incomplete Pop-Up

Roles: This user guide details functionality for an Analyst, NHSC LRP Analyst and DNHSC Team Lead.

Pre-Conditions:

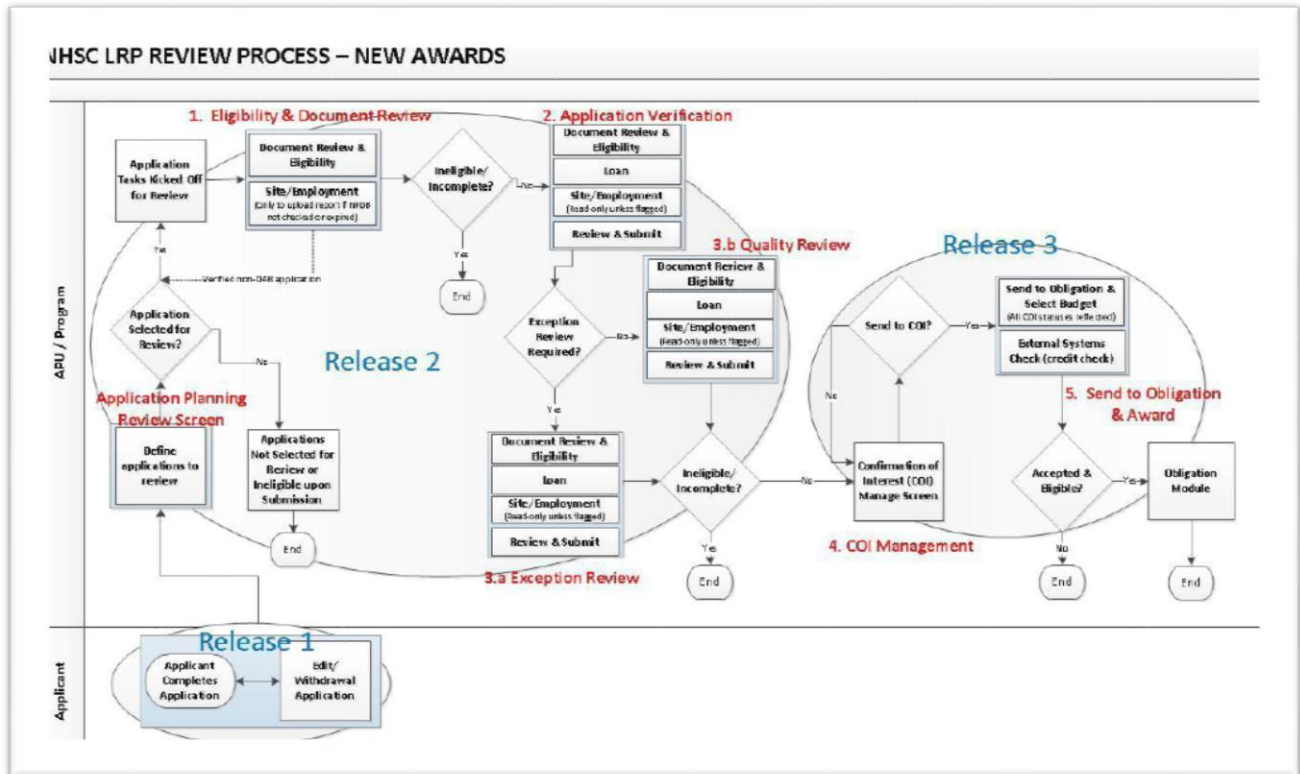
1. NHSC LRP application cycle has closed.
2. NHSC LRP applicant has submitted an eligible application.
3. Program/APU has completed running the Excluded Parties List Systems (EPLS) check.

Post Conditions:

1. NHSC LRP analyst has submitted review for the applicant and the applicant is eligible to be sent a confirmation of interest (COI).
2. NHSC LRP analyst has submitted review for the applicant and the applicant has been deemed ineligible or incomplete.
3. NHSC LRP analyst has discontinued reviewing an application or been whitelisted.
4. NHSC LRP analyst or applicant has withdrawn the NHSC LRP application.

Section 1: NHSC LRP Review Process Flow

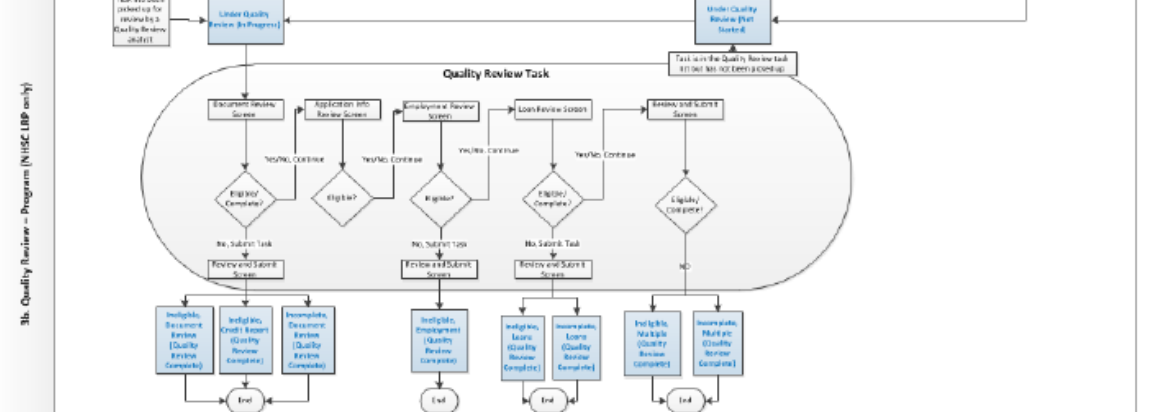
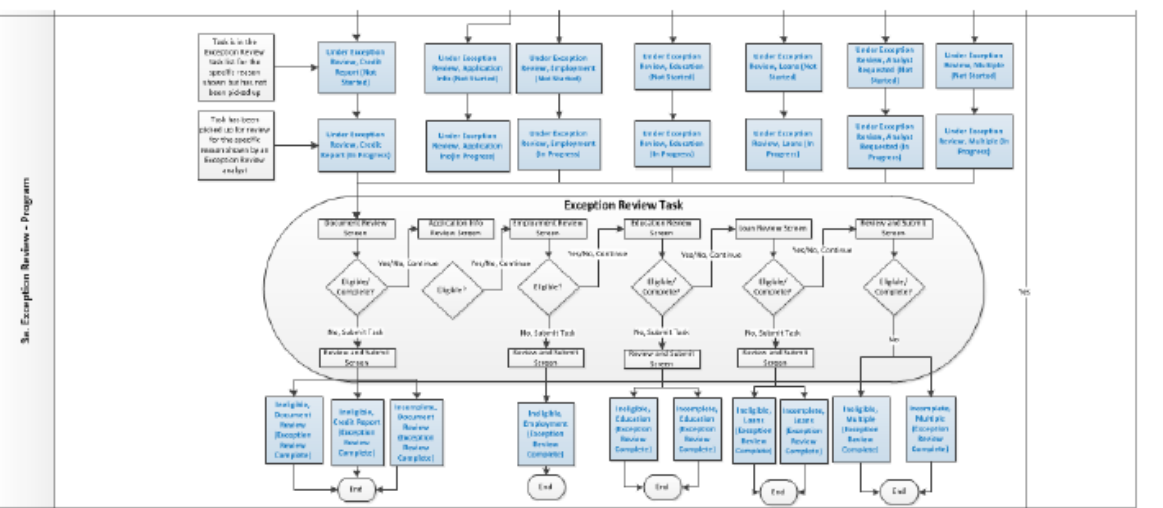
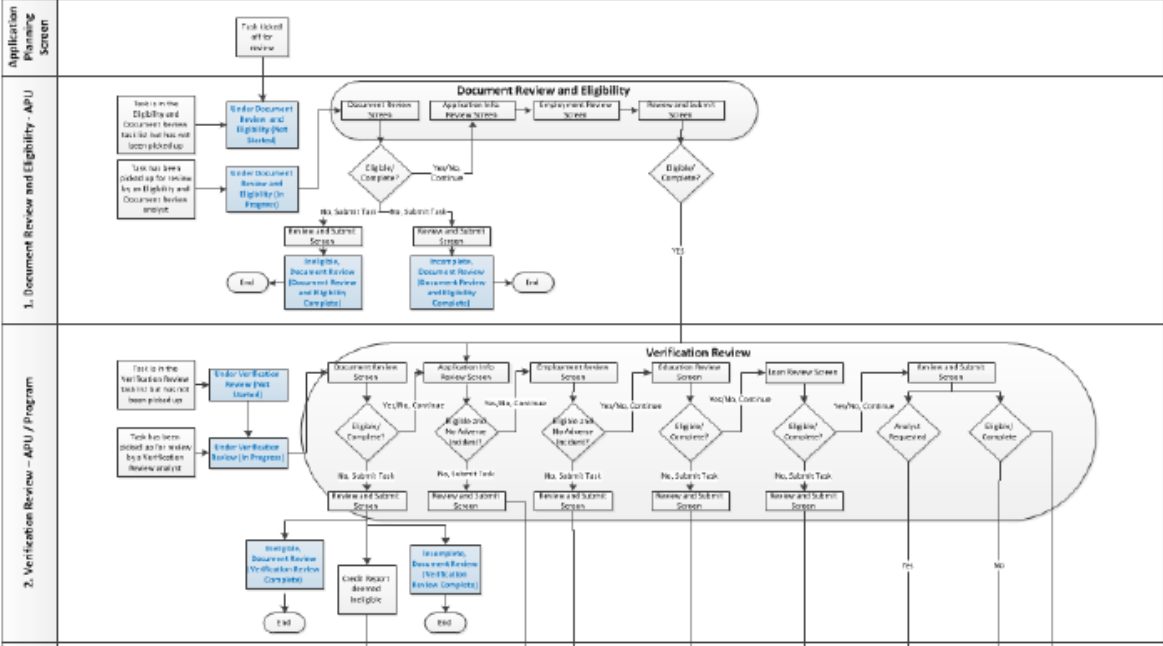
Below is a high-level process flow from when the applicant submits an eligible application through review and award. The page below provides a detailed process flow of the review process.



Below is a process flow for the NHSC LRP Review process functionality included in this user guide. Applicants that submitted an eligible application will be available to be kicked off for review. Once review is started for an applicant, the application will be available the first step of review (Document Review and Eligibility).

Applications that are deemed eligible from the first step of review available for the second step of review (Verification Review). Applications that are deemed eligible from the second step of review will become available for one of third steps of review (Quality Review). If the applicant is deemed ineligible or incomplete from the second step of review, the application will be sent to one of third steps of review (Exception Review). If the applicant is deemed eligible from any of the third steps of review, the applicant will be eligible for COI. All applicants deemed ineligible or incomplete during review will be available to be recommenced.

FY16 Review Internal Statuses



Section 2: Applicant Banner

The banner provides high-level information of the applicant being reviewed by the user. This is available on all review pages, as well as on the Application Profile.



The screenshot shows an applicant banner for 'Justin A. Devine' with email '0C526DA2CF0DE14FBD@EXAMPLE.com'. The banner contains a table of application details and two action links: 'View Full Application' and 'View NSLDS Report'.

Justin A. Devine 0C526DA2CF0DE14FBD@EXAMPLE.com					
Application ID	445678	Tier	One	Submitted On	February 16, 2019
Program	NHSC LRP	HPSA	18 : 18	Status	Submitted Review Not Started
Phone	(000) 000-0000	HPSA Type	Primary Care	View Full Application	
Discipline	Nurse Practitioner	DAB/EFN	No	View NSLDS Report	
Specialty	Family Practice	Scholar	Yes		
Application type	2 Year Full Time	Rank	N/A		

Business Rules:

Applicant name and email is displayed at the top of the banner. The following information will be displayed on the banner:

- Application ID
- Program
- Phone
- Discipline
- Specialty
- Application Type
- Tier
- HPSA: Two scores will be displayed: the locked score and the highest score
- HPSA Type
- DAB/EFN {Yes/No}
- Scholar {Yes/No}
- Rank
- Submitted Date
- Status
- Reason (This will only be displayed if applicable)
- Section Info (This will only be displayed if applicable)
- The application summary report will open the PDF version of the application in a new window
- The NSLDS Report will download an excel document of the applicant's comprehensive NSLDS data if they retrieved loans electronically.

The applicant email and phone will update if the applicant updates this information by using the Account Settings

- The following fields are dynamic based on the most updated review information:

- DAB/EFN
- Status
- Reason
- Section Info
- The HPSA score will display two scores, locked HPSA score : highest HPSA score
 - The locked HPSA score will not change, regardless if a HPSA score is updated internally in BMISS. This score is the lowest score of the site(s) the applicant applied with upon submitting his/her application.
 - The highest HPSA score will dynamically be reflect if changes are made internally in BMISS. This score is the highest score of the site(s) the applicant applied with upon submitting his/her application.

Section 3: Application Profile

The Application Profile will allow analysts to view detailed information about an applicant. A user can navigate to the Application Profile through different access points in BMISS including: Application Search, Review Planning, and from a review page. All users will have the ability to search for all applicants via the Application Search screen.

NHSC LRP Application Search

Search Criteria

Choose Application Cycle
 Application Cycle * 2019

Search by Application Information

Application Type * All

HPSA From Select To Select

Discipline ALL

HPSA Type All

Site Assignment Both

DAB/EFN Both

Scholar Both

Status Select

Reasons Select

Submission Date Range On or Before Date

Employment Start Date On or Before Date

Search

or

Search by Person

Last Name

First Name

Application ID

Last 4 SSN xxxx-xx-

Search

Steps:

1. Analyst navigates to the Applicant Search (Programs > NHSC LRP > Applicant Search) on the BMISS Home Page.
2. Analyst will select the appropriate search criteria.
3. Analyst selects Search after selecting search criteria.
4. Analyst clicks on an Applicant ID
5. System directs analyst to the applicant's Application Profile

Business Rules:

- Applicants in all statuses will appear in the search results
- Only applicants that meet the search criteria will appear in the search results
- Analysts can search by search criteria using the "Search by Applicant Information" section or search for a specific applicant using the "Search by Person" section.
- Analysts can filter search results by using all, some, or none of the Application Information criteria:
 - Application Type
 - HPSA Range (Lowest to Highest)
 - Discipline
 - HPSA Type
 - Site Assignment
 - DAB/EFN
 - Scholar
 - Status
 - All available status will be displayed in the status dropdown when using the search criteria on the Application Search screen
 - Note: This field is not available on Review Planning-Start Review screen
 - Submission Date Range
 - On or Before
 - On or After
 - Employment Start Date
 - On or Before
 - On or After
- Analysts can select Search without entering any search criteria to see all applicants
- Above the search results, analysts will be able to see the Total number of applicants that meet the search criteria
- The search results will show each applicant's:
 - App ID
 - Last Name
 - First Name
 - Application Type
 - Status
 - HPSA (locked score)
 - HPSA Type

- Discipline
- Scholar
- DAB
- Submitted Date
- Analyst can Export to Excel to see all current search results in an excel spreadsheet
- Analyst can click on the Applicant ID to be taken to the applicant's Application Profile
- The Application Cycle will default to the current cycle, but analysts can select previous cycles to search for past applicant

Section 3a: Application Profile – Overview

Application Overview

Name		Contact Information	
First Name	Steven M	Preferred Phone	0000000000
Last Name	Debulgado	Alternate Phone	
Title	Dr.	Address	123 Anywhere St. Anytown, MP 96950 United States
Suffix	DDS	Email	F3EF22C508A1C9E2BD@EXAMPLE.com
Former First Name			
Former Last Name			
Demographics		Application Information	
Gender	Male	Submitted Date	February 16, 2019
Ethnicity	Not Hispanic or Latino	Status	Submitted Review Not Started
Race	Asian	Reason	None
		Discipline	Dentist
		Specialty	General Practice
		NPI	
		Task Owner	None
		Telehealth	Provides services? No Telehealth site? N/A Percent of services? N/A
Award Information		Actions	
Award Amount	\$50,000.00	<ul style="list-style-type: none">• Withdraw Application• Discontinue Review	

Once an analyst clicks on an applicant's Application ID from the search results, the analyst will be directed to the Overview tab of the applicant's Application Profile.

Business Rules:

- Analyst will be directed to the Overview tab of the Application Profile upon selection of the applicant's Application ID in the search results
- Analysts can view basic applicant information in the Name table, Contact Information table, and Demographics table
 - Note: The Demographics table may not have complete information, as demographic information is optional on the online application

- The Application Information table will display information about the application:
 - Submitted Date
 - This will be the latest submission date
 - Status
 - Reason
 - This will be “None” unless the applicant has been deemed ineligible or incomplete from review, or is in Exception Review
 - Discipline
 - Specialty
 - NPI
 - Task Owner
 - This will be “None” if the task is not currently being reviewed by an analyst
 - Telehealth
 - Applicants are only required to answer whether they provide telehealth services. This information will be displayed under the “Provided Service?” field.
 - Both the type of telehealth site and percentage of time spent providing telehealth are optional and may display as ‘N/A’ if not answered by the applicant.
- The Award Information table will reflect the estimated total award amount calculation based on the loans submitted for review and application type.
- Analysts can internally withdraw an application by selecting Withdraw Application, discontinue review of an application by selecting Discontinue Review, initiate an Ad-Hoc EV, and Whitelist from the Actions table:
 - These functionalities are role-based
 - Please see section 4 for further information on using these functionalities
- Analyst can enter comments by entering comments in the New Comments text box and selecting Add Comment
- Analyst can view all existing comments entered on the Application Overview under Existing Comments
- Existing Comments will display the analyst, date, and time of the comment

Section 3b: Application Profile – Documents

Analysts can navigate to the Documents tab of the Application Profile to view all documents associated with the application.

Applicant Profile

Overview

Documents

History

Verifications

Documents Checklist

Please validate any supporting document received for the above applicant

▼ General Supporting Documents

Document Type	Document Name	Submitted Date	Entered By
<input type="radio"/> Additional Supporting Document			
<input type="radio"/> Proof of U.S. Citizenship or U.S. National	Passport.pdf	2/11/2019	Applicant
<input type="radio"/> Proof of Payment History for Prior NHSC LRP Service			
<input type="radio"/> DATA 2000 Waiver			
<input type="radio"/> Substance Use Disorder Licensure or Certification			
<input type="radio"/> Authorization for Disclosure of Loan Information Form			
<input type="radio"/> Privacy Act Release Authorization			
<input type="radio"/> Private Practice Option Forms			

▶ Loan Documents

▶ Employment Verification Documents

▶ Employment Supporting Documents

Business Rules:

- All documents will be included in their appropriate document section
- All sections are expandable/collapsible
 - The sections will be defaulted to collapsed
- All documents will open in a new window
- Each table will show the Document Type, Document Name, Submitted Date, and Entered By
- The Document Type will link to the document
- Analysts can upload an Additional Supporting Document to any of the sections
- Analysts can overwrite any existing document except for loans
 - Loan documents cannot be overwritten; only additional loans documents can be added
 - Electronic loans will by default only have an option to add additional documents
 - Authorization for Disclosure of Loan Information Form
 - Privacy Act Release Authorization
 - Private Practice Option Forms
- Substance Use Disorder (SUD) Documents Include:
 - DATA 2000 Waiver
 - Substance Use Disorder Licensure or Certification
 - Eligible Health Professional Degree
- Each loan and its corresponding documents will be grouped together
- Electronically retrieved loans will by default have no documents present
- Analysts have the option to upload the following forms if requested by the applicant:

- The Credit Report will be available to upload under the Review Supporting Document after an applicant submits their application, even if review for that applicant has not started
 - This document will then be available on the review pages if uploaded from the Application Profile
- Analyst can enter comments by entering comments in the New Comments text box and selecting Add Comment
- Analyst can view all existing comments under Existing Comments
- Existing Comments will display the analyst, date, and time of the comment

Applicant Profile

Overview

Documents

History

Verifications

Documents Checklist

Please validate any supporting document received for the above applicant

▶ **General Supporting Documents**

▶ **Loan Documents**

▶ **Employment Verification Documents**

▶ **Employment Supporting Documents**

▼ **Review Supporting Documents**

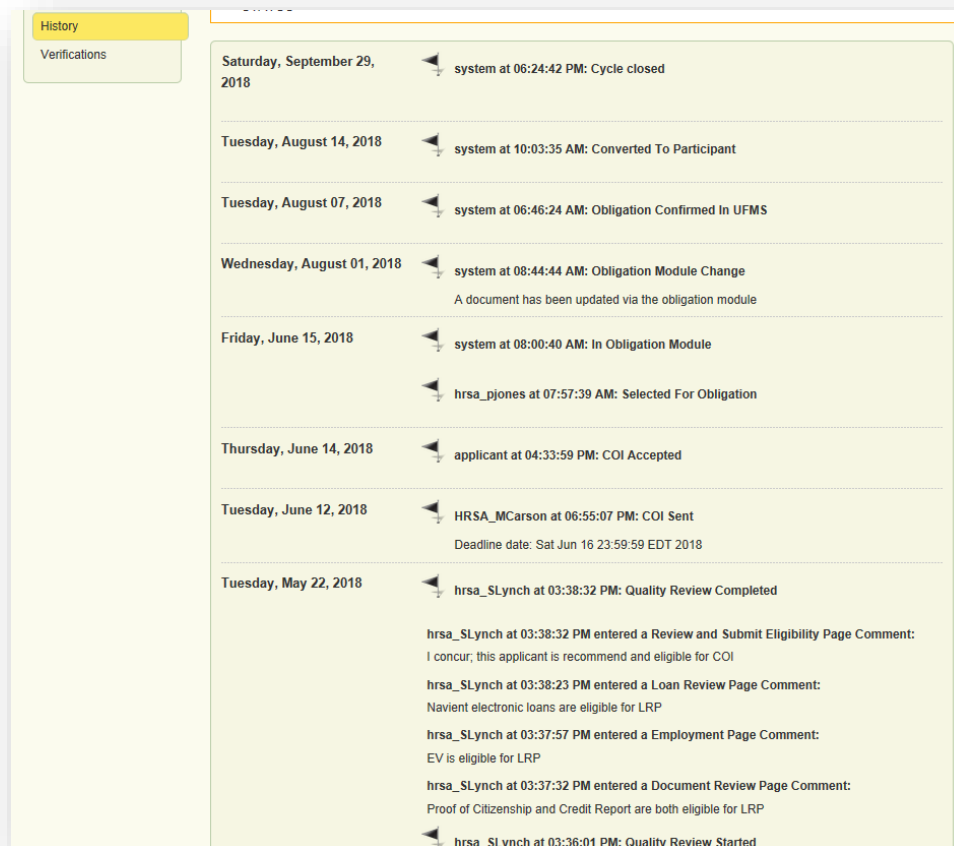
Document Type	Document Name	Submitted Date	Entered By
<input type="radio"/>	Credit Report		
<input type="radio"/>	NPDB Recommendation Document		

Comments

New Comments

Section 3c: Application Profile – History

Analysts can navigate to the History tab of the Application Profile to view all tracking points and comments associated with the application.



Business Rules:

- There are no actions that can be taken on the History tab of the Application Profile
- Tracking points will be created when a specific action is taken
- Examples include:
 - Applicant started his/her application
 - Applicant retrieved/updated/removed loans via NSLDS Web Services
 - Applicant received an error during NSLDS retrieval
 - Applicant submitted his/her application
 - Applicant submitted his/her application ineligibly
 - Tracking point will also list one or all of the reasons the application was submitted ineligibly (see image on next page)
 - Applicant edited their application after submission
 - Applicant is Whitelisted

- Analyst kicked off the task for review
- Review is started or completed at a step of review
- Application Review is Discontinued
- All tracking points will be identified with a flag.
- All tracking points will be displayed with the user, time, and action that was taken
- All comments will be displayed with the user, time, comment type, and comment
- All tracking points and comments will be ordered by date in descending order
- All tracking points and comments will be grouped by date

Friday, February 05, 2016



applicant at 10:27:00 AM: Application Submitted Ineligible

The obligation end date must be before the submission date.



applicant at 10:03:29 AM: Application Started

Section 3d: Application Profile – Verifications

Analysts can navigate to the Verifications tab of the Application Profile to see the review verifications of the application.

Applicant Profile

- Overview
- Documents
- History
- Verifications**

Verifications

▼ **Document Review - Eligible**

General Supporting Documents

Document Type	Document Name	Status
Eligible Health Professional Degree	U of M.pdf	Complete Eligible
Proof of U.S. Citizenship or U.S. National	Shanna BC 2.pdf	Complete Eligible
Verification of Disadvantaged Background/Exceptional Financial Need	Disadvantaged Background Verification Form.pdf	
Substance Use Disorder Licensure or Certification	SHANNA_HARRIS_ROMERO_License_Certificate_06192018_113354.pdf	Complete Ineligible
Credit Report	AA_Test_Document.pdf	Did Not Check

Deemed Eligible by hrsa_zeshawn_uddin on 02/26/2019 10:38:59 AM EST.

[View Comments](#)

▼ **Application Information Verification - Eligible**

1. Do you provide substance use disorder services (e.g. Buprenorphine treatment or substance use disorder counseling) at your site? Yes, both treatment options

2. Are you licensed or certified in your state to provide substance use disorder services? If yes, please upload your credentials in the Supporting Documents section. Yes

3. Do you possess a DATA 2000 waiver? If yes, please upload your waiver in the Supporting Documents section. No

4. Will you have substance use disorder training or certification completed by July 18, 2019? Yes

5. I am applying to work at a NHSC-approved site because of the: (Check all that apply)

- Substance Use Disorder treatment incentive
- Opportunity to work with an underserved population
- Interest in working in an underserved area

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? No

Based on the answers above, do you recommend continuing review for this applicant? Yes

Deemed Eligible by hrsa_zeshawn_uddin on 02/26/2019 10:38:28 AM EST.

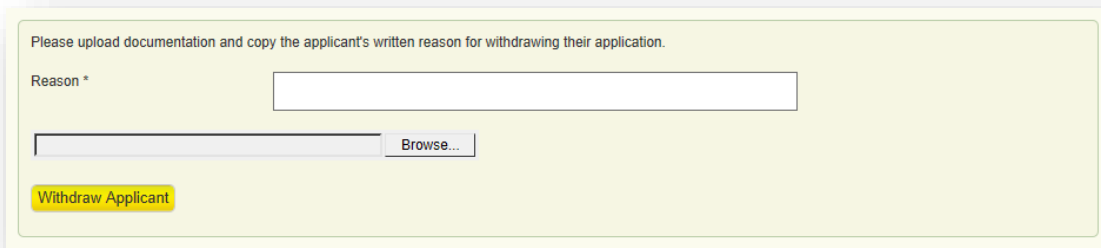
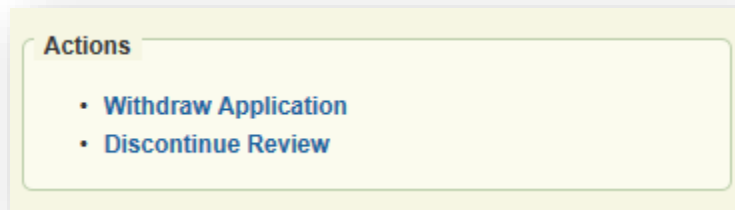
Business Rules:

- The Verification tab of the Application Profile will show the verifications, if any, that have been made for the applicant during review.
- The most recent status of each section will be displayed next to the section name

- Section statuses include:
 - Not Reviewed
 - Eligible
 - Ineligible
 - Incomplete
- Each section is expandable/collapsible
- Analyst can click on any document in the Document Review section and the document will open in a new window
- The most recent status the analyst deemed each document will be displayed in the Document Review table
- Analyst can click on the Application Information section to see responses to application questions
- Analyst can click on the Employment Verification in the Employment Verification table to view the Employment Verification Form
- Analyst can click on any of the loans to view the verified loan detail information
 - Loan documents will be available within the loan details if present
- The most recent status of the section, most recent analyst who reviewed the section, and date and time that the section was reviewed last will be displayed under each section
- Analysts can select View Comments to see all comments entered for each section
- All comments made on the Review & Submit page during review will be displayed under Review & Submit Comments

Section 4a: Withdraw Application

Should an analyst needs to withdraw an application, he/she can navigate to the Overview tab of the Application Profile.



A screenshot of a form titled "Withdraw Application". The form contains the following elements: a heading "Please upload documentation and copy the applicant's written reason for withdrawing their application.", a "Reason *" text input field, a file upload field with a "Browse..." button, and a yellow "Withdraw Applicant" button.

Steps:

1. Analyst navigates to the Application Profile
2. Analyst scrolls to the bottom of the Overview tab of the Application Profile
3. Analyst (if he/she has the role) will see the options to Withdraw Application, Discontinue Review, Whitelist or Re-initiate EV.
4. Analyst selects Withdraw Application
5. System directs analyst to the Withdraw Application screen
6. Analyst enters a reason in the comment field
7. Analyst uploads the supporting documentation (optional)
8. Analyst selects Withdraw Applicant

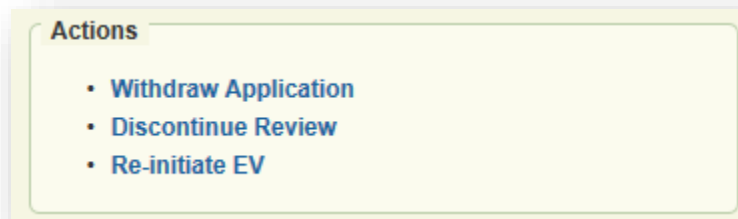
Business Rules:

- Withdraw Application is role-based
 - Analysts that do not have the role will not see this option on the Overview tab of the Application Profile
- Comments and a document are required to withdraw an application
- Applicants that have been withdrawn will be available on the Recommence tab of the Review Planning screens
- The applicant's external status will be updated to Withdrawn

- Withdraw should only be used if requested from the applicant
- The Withdraw document uploaded by the analyst will be available under Review Documents on the Documents tab of the Application Profile
- Withdraw comments can be seen as existing comments on the Overview tab of the Application Profile and on the History tab of the Application Profile
- If a task is in review when it has been Withdrawn, the analyst will receive a notification upon running the task that the task has been withdrawn and the task will then be terminated from the task list.

Section 4b: Discontinue Review

Should an analyst needs to discontinue review, he/she can navigate to the Overview tab of the Application Profile.



Discontinue Application Review

Please select the reason for discontinuing their application, enter in a comment for explanation. For excluded party list reason, documentation is required.

Discontinue Reason *

Select

Comment *

Steps:

1. Analyst navigates to the Application Profile
2. Analyst scrolls to the bottom of the Overview tab of the Application Profile
3. Analyst will see the option Discontinue Review
4. System directs analyst to the discontinue review screen
5. Analyst selects a reason from the drop down list
6. Analyst uploads the supporting documentation
 - a. Note: Supporting documentation is required for Excluded Party List only. Supporting Documentation for all other discontinue reasons is optional.
7. Analyst selects Discontinue Application Review

Business Rules:

- Discontinue Review is role-based.

- Analysts that do not have the role will not see these options on the Overview tab of the Application Profile.
 - Note: Discontinue Review, Withdraw Application, Whitelist and Re-initiate EV are role specific; a user may see both, one, or no actions.
- Comments are required to discontinue review.
- It is required that an analyst selects a Discontinue Reason from the drop down list.
- Analyst will receive an error message if they do not upload a supporting document if he/she selects “Excluded Party List” as the Discontinue Reason.
- Supporting documentation is not required for all Discontinue Reasons except “Excluded Party List.”
- After analyst successfully discontinues review, the reason for discontinue review will be listed on the applicant banner.
- Discontinue Review has both a Discontinued Review Document and EPLS Document as options to upload
- The appropriate option should be selected depending on the reason for discontinuing review
- Applicants that have been withdrawn or discontinued will be available on the Recommence tab of the Review Planning screens
- Discontinue Review will not update an applicant’s external status
- Withdraw will update the applicant’s external status to Withdrawn
- Withdraw should only be used if requested from the applicant
- The Withdraw and Discontinue Review documents will be available under Review Documents on the Documents tab of the Application Profile
- Withdraw and Discontinue Review comments can be seen as existing comments on the Overview tab of the Application Profile and on the History tab of the Application Profile
- If a task is in review when it has been Withdrawn or Discontinued, the analyst will received a notification upon running the task that the task has been withdrawn or discontinued and the task will then be terminated from the task list.

Section 4c: Re-Initiate EV (Ad-Hoc EV)

Should an analyst need to re-initiate EV (i.e., send an “Ad-Hoc EV”) he/she can navigate to the Overview tab of the Application Profile.

Actions

- [Withdraw Application](#)
- [Discontinue Review](#)
- [Re-initiate EV](#)

Re-initiate EV

Current Employment Verifications

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score	Action
01/31/2019	Katahdin Valley Health Center- Ashland Health Center	747498	Complete	Primary Care	17	Reinitiate

All Employment Verifications

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/31/2019	Katahdin Valley Health Center- Ashland Health Center	747498	Complete	Primary Care	17
01/29/2019	Katahdin Valley Health Center- Ashland Health Center	747498	Complete	Primary Care	17

Ad Hoc EV Comments

New Comments

Existing Comments

Thursday, January 31, 2019 hrsa_VNoland at 09:39:11 AM entered a Ad Hoc EV Comment:
FT hours need to be updated from 37 hours to 40 hours for FT

Steps:

1. Analyst navigates to the Application Profile.
2. Analyst scrolls to the bottom of the Overview tab of the Application Profile.
3. Analyst (if he/she has the role) will see the options to Withdraw Application, Discontinue Review, Whitelist or Re-initiate EV.
4. Analyst selects Re-initiate EV.
5. Analyst enters comments in the New Comments text field (required).

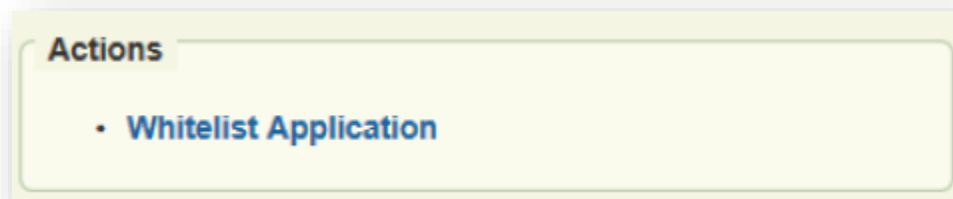
6. Analyst will click the Reinitiate button in the Current Employment Verifications Table (see Figure A on next page).
7. Analyst will click the Cancel button in the Current Employment Verifications Table if they wish to cancel the re-initiated EV (see Figure B on next page).
 - a. Note: Analyst will be required to enter comments in the New Comments text field before clicking cancel.

Business Rules:

- The ability to initiate an Ad Hoc EV is role based. Only Analysts with the role will see the Re-initiate EV link.
- The Re-initiate EV link will only be available for applications that have been submitted eligibly and are past the review planning stage.
- Analyst will be required to enter a comment when initiating an Ad Hoc EV.
- Once reinitiated, the Ad Hoc EV will be added to the history table.
- Once reinitiated, the analyst will have the ability to cancel the Ad Hoc EV.
- Analyst will be required to enter a comment when cancelling an Ad Hoc EV.
- The most recently completed EV will be displayed on the Review Screens and the Submitted Application Landing Page.
- Analyst(s) shall not be prevented from moving forward with review of an application because there is a reinitiated EV.
- The applicant's status will not be changed when analyst initiates an Ad Hoc EV.
- Once an Ad Hoc EV has been initiated, an alert will be added to the participant profile stating "One or more EVs are incomplete for this application."
- System shall remove the alert from the participant profile if/when the EV is completed.
- A tracking point will be added to the Application History when an Ad Hoc EV is initiated or cancelled.
- Ad Hoc EV functionality is not available for applications submitted with an employment start date that falls after the date of application submission.

Section 4d: Whitelist Application

Should an analyst need to Whitelist an applicant he/she can navigate to the Overview tab of the Application Profile and select 'Whitelist' Application under than 'Actions' section.



Whitelist Application

Please select the whitelist duration and leave a comment for explanation.

Application Open Date *

Application Close Date *

Comment *

[Whitelist Application](#)

Steps:

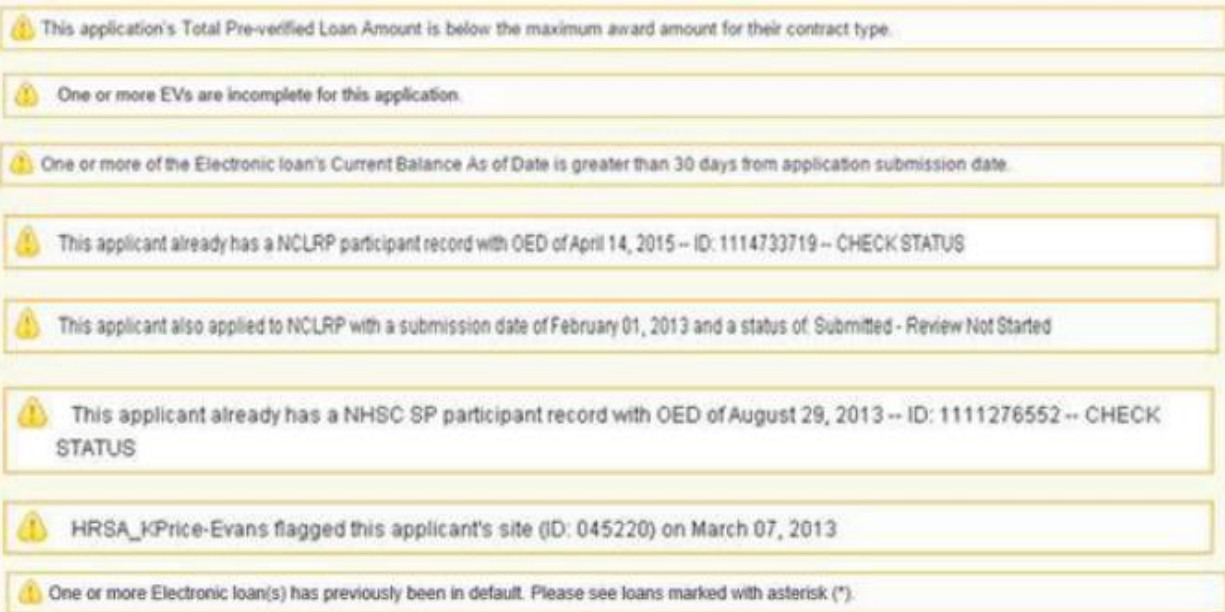
1. Analyst clicks the 'Whitelist Application' link
2. Analyst enters the appropriate open and close dates and leaves comment/reason for whitelisting
3. Completes whitelist by clicking "Whitelist Application"

Business Rules:

- Analyst must have appropriate BMISS roles to see 'Whitelist Application' link.
- Current application cycle must be closed.
- Application must be in appropriate status.
 - Application cannot currently be in review and onwards in the award process.
Application review must be Discontinued first to allow Whitelisting. See section 4b.
- Analyst must enter start date which is on or after current date.
- Analyst must enter a future close date prior to September 30th of the current fiscal year.
- The applicants will only be able to update their application within this period.
- A tracking point is saved on the history tab with each Whitelist.

Section 5: Alerts

Alerts provide information for analysts to be aware of while reviewing an application. Alerts will not make any changes to the application data, but notify analysts of important information that may require action to be taken.



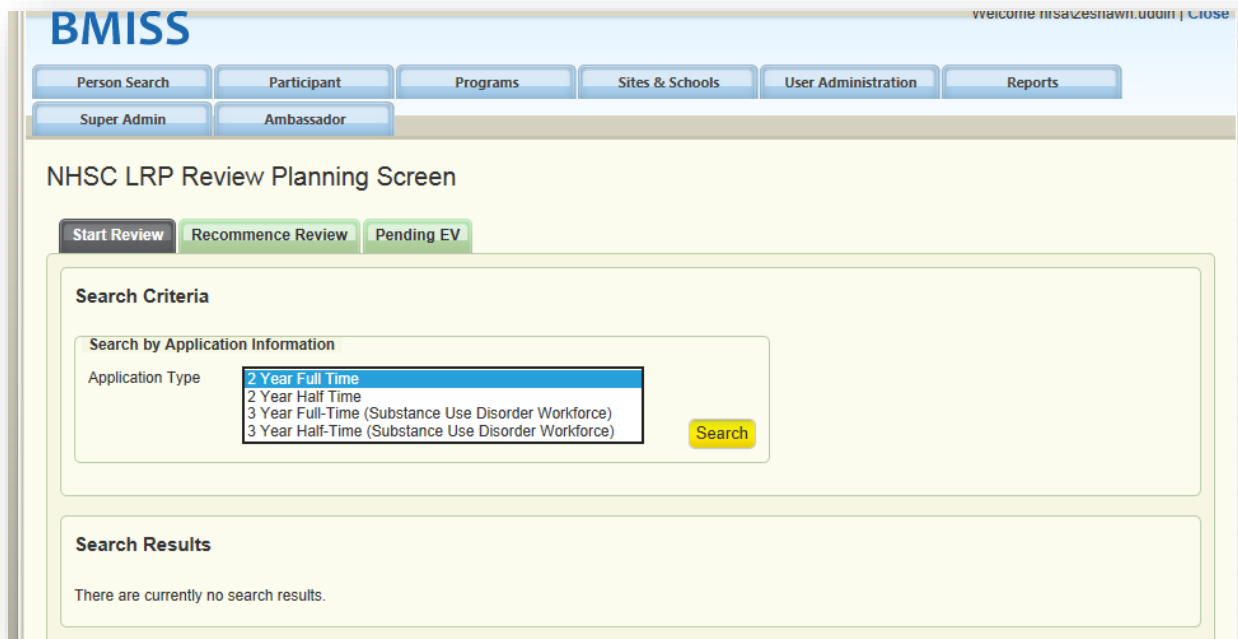
Business Rules:

- Alerts will be shown on each page of review, as well as on Application Profile
- Applicants can have more than one alert
- The following are some of the available alerts:
 - Pre-verified Loan Amount is below the maximum award amount for their contract type
 - If an applicant was a previous participant for another BCRS program or the same program and were awarded in a previous FY
 - The alert will display: "This applicant already has a <Program> participant record with OED of : MM/DD/YYYY -- ID: XXXXXXXX – CHECK STATUS"
 - If the applicants loans are below the maximum award amount
 - The alert will display: "This application's Total
 - If one or more of the applicants electronic loan's Current As of Date is greater than 30 days from the application submission date.
 - The alert will display: "One or more of the Electronic loan's Current As of Date is greater than 30 days from application submission date"
 - If one or more of the applicants electronic loan's had been defaulted in the past.
 - The alert will display: "One or more of the Electronic loan(s) has previously been in default. Please see loans marked with and asterisk (*)."
 - If the applicant has applied to multiple BCRS programs in the same cycle

- The alert will display: "This applicant has applied to <other Program> and is currently in <other program internal> status."
- If the applicant's site was flagged by a DRO analyst
 - The alert will display: "<Username who flagged site> flagged this applicant's site on <MM/DD/YYYY>. ID#: XXXXXX"
- If an applicant's site HPSA ID is deleted after submission
 - The alert will display: "One or more HPSAs associated with this applicant's site(s) has been removed." - DO NOT AWARD."
- If an applicant's locked HPSA score impacts the applicants tier
 - The alert will display: "The HPSA score associated with the applicant's site has changed from XX to XX. ID#: XXXXX – CHECK HPSA STATUS"
- If the applicant's site is terminated
 - The alert will display: "The site associated with this application has been terminated. ID#: XXXXX" - DO NOT AWARD"
- If the applicant's site loses its certification (becomes inactive)
 - The alert will display: "The site associated with this application is inactive. ID#: XXXXX. – DO NOTAWARD"
- If an Ad Hoc EV is initiated
 - The alert will display: "One or more EVs are incomplete for this application."

Section 6: Applying Rank

Once the application cycle has closed and prior to the application review, the analyst will apply the rank to the submitted applications. Team Leads can apply rank on the Review Planning screen. Only analysts with the appropriate role will have the ability to apply rank.



Steps:

1. Analyst navigates to the Review Planning Screen (Programs > NHSC LRP > Review Planning) on the BMISS Home Page.
2. Analyst will be directed to the Start Review tab of the Review Planning screen. Analyst selects and Application Type and clicks Search.
3. Analysts review the applications to which rank will be applied.
4. Analyst confirms the tasks to which rank will be applied and clicks the “Apply Rank” button

Business Rules:

- Both Full-time and Half-time search results will include complete application list prior to ranking.
 - Any Additional Application Types added for a particular cycle will also appear and must be selected and ranked.
 - Traditional NHSC LRP and Substance Use Disorder (SUD) ranks both Full-time and Half-time application types together
- Analysts must apply rank prior to commencing review.
- The “Apply Rank” button only appears if rank has not yet been applied.

- Once rank has been applied, the system will add and display a new column in the search results table displaying the rank number.
- Once rank is applied, the system will generate a tracking point.
- Once rank has been applied, the ‘Search Criteria’, ‘Search by Person’, ‘Start Review”, and ‘I want to kick off tasks for all 0 selected results *” checkbox options will be displayed. They will not be displayed before rank is applied (see Section 7).

<input type="checkbox"/>	454727	Harris Romero	Shanna	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	19	Mental Health	Substance Use Disorder Professional	No	Yes	2/5/2019
<input type="checkbox"/>	452588	Schmidt	Kaitlin	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	19	Primary Care	Nurse Practitioner	No	Yes	1/30/2019
<input type="checkbox"/>	458861	Diezsi	yavonne	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	18	Mental Health	Substance Use Disorder Professional	No	Yes	2/8/2019
<input type="checkbox"/>	447200	Konigsberg	Yvette	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	18	Primary Care	Nurse Practitioner	No	Yes	1/15/2019
<input type="checkbox"/>	453942	Fonsworth	Peolia	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	18	Mental Health	Allopathic Physician	No	Yes	1/22/2019
<input type="checkbox"/>	451751	Arndt	Angela	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	18	Mental Health	Licensed Professional Counselor	No	Yes	1/23/2019
<input type="checkbox"/>	454481	Tran	Quyen	3 Year Full-Time (Substance Use Disorder Workforce)	Submitted - Review Not Started	18	Primary Care	Nurse Practitioner	No	Yes	2/4/2019

1 2 3 4 5 6 ... ▶ ▶▶

[Apply Rank](#)

Section 7: Review Planning – Start Review

Once the application cycle is closed, applications that have been submitted eligible will be available to be kicked off for review. DNP Team Leads can kick off tasks for review using the Review Planning screen.

NHSC LRP Review Planning Screen

Start Review | Recommendation Review | Pending EV

Search Criteria

Search by Application Information

Application Type: 2 Year Full Time

HPSA From: Select To: Select

Discipline: ALL

HPSA Type: All

Site Assignment: Both

DAB/EFN: Both

Scholar: Both

Submission Date Range: On or Before Date: [calendar icon]

Employment Start Date: On or Before Date: [calendar icon]

Search

or

Search by Person

Last Name: [input]

First Name: [input]

Application ID: [input]

Last 4 SSN: XXX-XX- [input]

Search

Steps:

1. Analyst navigates to the Review Planning Screen (Programs > NHSC LRP > Review Planning) on the BMISS Home Page.
2. Analyst will be directed to the Start Review tab of the Review Planning screen.
3. Analyst will select the appropriate search criteria.
4. Analyst selects Search after selecting search criteria.
5. Analyst selects the tasks to kick off in the search results by selecting the checkbox next to each applicant's name (see screenshot on next page).
6. Analyst confirms the tasks to kick off by selecting "I want to kick off tasks for all X selected results."
7. Analyst selects Start Review.

Business Rules:

- Only applicants that are in the status of "Submitted- Review Not Started" and match the search criteria selected by the analyst will appear in the search results on the Start Review tab.
- Analysts can search for applications by using the "Search by Applicant Information" section or search for a specific applicant using the "Search by Person" section.
- The search criteria for "Search by Applicant Information" will display the following:
 - Application Type
 - HPSA Form
 - Discipline
 - HPSA Type

- Site Assignment
- DAB/EFN
- Scholars
- Submission Date Range
- Employment Date Range
- Analysts can search using all, some, or none of the search criteria.
 - Analysts can select Search without entering any search criteria to see all applicants in “Submitted- Review Not Started” status.
 - Analysts can search using partial last and/or first name information.
- No Search results will appear if there are no applicants in the “Submitted- Review Not Started” status that match the search criteria selected.
- Above the search results, analysts will be able to see the Total number of applicants that meet his/her search criteria, the Total Award Amount of the applicants that meet the search criteria, Total Applicants Selected, and Award Amount of the applicants selected.
 - Note: The Total Award Amount and Award Amount Selected are estimated values based on the applicant’s loan amounts and application type.
- The search results will show each applicant’s:
 - Rank
 - App ID
 - Last Name
 - First Name
 - Application Type
 - Status
 - HPSA (locked score)
 - HPSA Type
 - Discipline
 - Scholar
 - DAB
 - Submitted Date
- Analyst can Export to Excel to see all current search results in an excel spreadsheet.
- Analysts can select the top checkbox to select all applicants on the page.
- Analysts can chose to “Select all X search results” to select all applicants on all pages of the search results.
- Analyst can click on the Applicant ID to view the applicant’s Application Profile in a new window.

Search Results

Total	Total Award Amount	Total Selected	Award Amount Selected
3,871	\$170,689,571.31	1	\$50,000.00

You have selected 1 task on this page. [Select all 3871 search results.](#)

[Export to Excel](#)

<input type="checkbox"/>	Rank	Appld	Last Name	First Name	App Type	Status	HPSA	HPSA Type	Discipline	Scholar	DAB	Submitted Date
<input checked="" type="checkbox"/>	1	444464	Janis	Jordan	2 Year Full Time	Submitted - Review Not Started	21	Dental	Dentist	Yes	No	1/7/2019
<input type="checkbox"/>	2	447222	Medlock	Mia	2 Year Full Time	Submitted - Review Not Started	21	Primary Care	Physician Assistant	Yes	No	2/14/2019
<input type="checkbox"/>	3	460433	Nlewem	Chimezie	2 Year Full Time	Submitted - Review Not Started	20	Primary Care	Osteopathic Physician	Yes	No	2/15/2019
<input type="checkbox"/>	4	449370	Cheatham-Terry	Jacquelyn	2 Year Full Time	Submitted - Review Not Started	19	Primary Care	Osteopathic Physician	Yes	No	1/30/2019
<input type="checkbox"/>	5	450177	Truong	Tuyet-Phi	2 Year Full Time	Submitted - Review Not Started	19	Dental	Dentist	Yes	No	1/11/2019

Section 7: Review Planning – Recommence Review

Analysts will have the ability to recommence tasks after an application has been deemed ineligible or incomplete from review, or has been withdrawn or discontinued.

NHSC LRP Application Planning Screen

Start Review | **Recommence Review** | Pending EV

Search Criteria

Search by Application Information

Application Type:

HPSA From: To:

Discipline:

HPSA Type:

Site Assignment:

DAB/EFN:

Scholar:

Status:

Reasons:

Section:

Submission Date Range: On or Before Date

Employment Start Date: On or Before Date

Search by Person

Last Name:

First Name:

Application ID:

Last 4 SSN:

Steps:

1. Analyst navigates to the Review Planning Screen (Programs > NHSC LRP > Review Planning) on the BMISS Home Page.
2. Analyst will be directed to the Start Review tab of the Review Planning screen.
3. Analyst selects the Recommence Review tab.
4. Analyst will select the appropriate search criteria.
5. Analyst selects Search after selecting search criteria.
6. Analyst selects the tasks to recommence in the search results by selecting the checkbox next to the applicant's name (see screenshot on next page).
7. Analyst confirms the tasks to recommence by selecting "I want to kick off tasks for all X selected results".
8. Analyst selects Recommence Review.

Business Rules:

- Only applicants that are in the statuses of "Ineligible," "Incomplete," "Withdrawn," or "Discontinued Review" and match the search criteria will appear in the search results on the Recommence Review tab.
- Analysts can search by search criteria using the "Search by Applicant Information" section or search for a specific applicant using the "Search by Person" section.
 - Discipline
 - HPSA Type
 - Site Assignment
 - DAB/EFN
 - Scholars
 - Submission Date Range
 - Employment Date Range
- Analysts can search using all, some, or none of the search criteria
- The search criteria for "Search by Applicant Information" will display the following:
 - Application Type
 - HPSA Form
- Analysts can select Search without entering any search criteria to see all applicants in "Ineligible," "Incomplete," "Withdrawn," or "Discontinued Review" status.
- No search results will appear if there are no applicants in "Ineligible," "Incomplete," "Withdrawn," or "Discontinued Review" that match the search criteria selected.
- Above the search results, analysts will see the Total number of applicants that meet the search criteria, the Total Award Amount of the applicants that meet the search criteria, Total number of applications selected ("Total Selected"), and Award Amount of the applicants selected.
- The search results will show each applicant's:
 - Application ID
 - Last Name
 - First Name
 - Application Type

- Status
 - HPSA (locked score)
 - HPSA Type
 - Discipline
 - Scholar
 - DAB
 - Submitted Date
- Analyst can Export to Excel to see all current search results in an excel spreadsheet.
 - Analysts can select the top checkbox to select all applicants on the page.
 - Analysts can chose to “Select all X search results” to select all applicants on all pages of the search results.
 - Analyst can click on the Applicant ID to be taken to the applicant’s Application Profile.

Search Results

Total 9 Total Award Amount \$379,301.91 Total Selected 0 Award Amount Selected \$0.00

[Export to Excel](#)

<input type="checkbox"/>	AppId	Last Name	First Name	App Type	Status	HPSA	HPSA Type	Discipline	Scholar	DAB	Submitted Date
<input type="checkbox"/>	445055	Nicolocci	Leah	3 Year Half-Time (Substance Use Disorder Workforce)	Withdrawn	19	Mental Health	Substance Use Disorder Professional	No	No	1/10/2019
<input type="checkbox"/>	451866	santasiero	Debra	2 Year Full Time	Review Discontinued	18	Primary Care	Osteopathic Physician	No	No	1/20/2019
<input type="checkbox"/>	444669	Hartman	Stephanie	2 Year Full Time	Withdrawn	17	Mental Health	Licensed Professional Counselor	No	No	1/6/2019
<input type="checkbox"/>	445244	Sachdeva	Rishi	2 Year Half Time	Withdrawn	17	Mental Health	Licensed Professional Counselor	No	No	1/31/2019
<input type="checkbox"/>	448376	Pitt	Shannon	2 Year Full Time	Withdrawn	16	Primary Care	Nurse Practitioner	No	No	1/29/2019
<input type="checkbox"/>	445506	Kelvey	Amanda	2 Year Full Time	Withdrawn	15	Primary Care	Osteopathic Physician	No	No	1/5/2019
<input type="checkbox"/>	445593	Kuestersteffen	Alexandra	2 Year Half Time	Withdrawn	14	Mental Health	Licensed Professional Counselor	No	No	1/14/2019
<input type="checkbox"/>	453503	Barron	Lainie	3 Year Full-Time (Substance Use Disorder Workforce)	Withdrawn	8	Mental Health	Substance Use Disorder Professional	No	No	2/4/2019
<input type="checkbox"/>	447223	Bell	Charlie	2 Year Half Time	Withdrawn		Mental Health	Licensed Professional Counselor	No	No	12/31/2018

I want to kick off tasks for all 0 selected results *

Recommend Review

Section 8: Review Planning – Pending EV

Analysts have the ability to view applications that have been kicked off for review, where the applicant indicated that one or more of his/her employment state dates began after his/her application submission date. Analysts also have the ability to cancel a Pending EV or Reinitiated EV from the Pending EV tab.

NHSC LRP Pending EV Screen

Start Review | Recommence Review | **Pending EV**

Search Criteria

Search by Application Information

Application Type * All

HPSA From Select To Select

Discipline ALL

HPSA Type All

Site Assignment Both

DAB/EFN Both

Scholar Both

Submission Date Range On or Before Date

Employment Start Date On or Before Date

Search

or

Search by Person

Last Name

First Name

Application ID

Last 4 SSN XXX-XX-

Search

Steps:

1. Analyst navigates to the Review Planning Screen (Programs > NHSC LRP > Review Planning) on the BMISS Home Page.
2. Analyst will be directed to the Start Review tab of the Review Planning screen.
3. Analyst selects the Pending EV tab.
4. Analyst will select the appropriate search criteria.
5. Analyst selects Search after selecting search criteria.
6. If an analyst wishes to cancel an EV, he/she will select the checkbox next to the applicant's name (see screenshot on next page).
 - a. Analyst confirms the tasks to recommence by selecting "I want to cancel EVs for all X selected results".
 - b. Analyst enters comments.

c. Analyst selects Cancel EV.

Business Rules:

- System will send an EV (1) day after the start date indicated on the previously completed EV.
- If one or more of an applicant’s employment start dates occurs after the date his/her application was kicked off for review, his/her status on the Pending EV page will be “Pending EV.”
- If an applicant’s employment start dates occurs after his/her submission date, but prior to the date the application was kicked off for review, his/her status on the Pending EV page will be “Awaiting Reinitiated EV.”

Search Results

Total	Total Award Amount	Total Selected	Award Amount Selected
7	\$316,900.51	0	\$0.00

You have selected 0 tasks on this page. [Select all 7 search results.](#)

[Export to Excel](#)

<input type="checkbox"/>	Appld	Last Name	First Name	App Type	Status	HPSA	HPSA Type	Discipline	Scholar	DAB	Submitted Date	Employment Start Date
<input type="checkbox"/>	269809	Page	Samuel	2-Year Full-time commitment	Awaiting Reinitiated EV	21	Dental	Dentist	No	No	3/4/2015	3/23/2015
<input type="checkbox"/>	259745	Campbell	Jessica	2-Year Full-time commitment	Awaiting Reinitiated EV	20	Primary Care	Nurse Practitioner	No	No	3/3/2015	3/9/2015
<input type="checkbox"/>	262180	Wolery	Becky	2-Year Half-time commitment	Pending EV Reinitiation	18	Mental Health	Licensed Clinical Social Worker	No	Yes	3/10/2015	4/20/2015
<input type="checkbox"/>	280078	Stabbe	Stephanie	2-Year Full-time commitment	Awaiting Reinitiated EV	17	Mental Health	Health Service Psychologist	No	Yes	3/30/2015	4/1/2015
<input type="checkbox"/>	266228	Coggins	Allahna	2-Year Full-time commitment	Awaiting Reinitiated EV	15	Primary Care	Allopathic Physician	No	Yes	3/28/2015	4/1/2015
<input type="checkbox"/>	262539	Humiston	Jon	2-Year Full-time commitment	Pending EV Reinitiation	14	Primary Care	Physician Assistant	No	Yes	2/7/2015	3/9/2105
<input type="checkbox"/>	267286	Meaders	Kanisha	2-Year Full-time commitment	Awaiting Reinitiated EV	14	Primary Care	Nurse Practitioner	No	Yes	2/19/2015	3/16/2015

I want to cancel EVs for all 0 selected results *

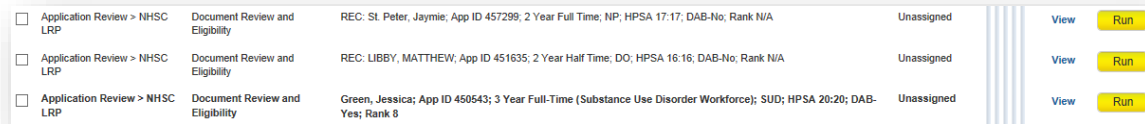
Comments

New Comments *

[Cancel EVs](#)

Section 8a: Step 1 – Document Review and Eligibility

After a task is kicked off for review from the Review Planning screens, the task will become available on the task dashboard for the first step of review: Document Review and Eligibility.



<input type="checkbox"/>	Application Review > NHSC LRP	Document Review and Eligibility	REC: St. Peter, Jaymie; App ID 457299; 2 Year Full Time; NP; HPSA 17:17; DAB-No; Rank N/A	Unassigned	View	Run
<input type="checkbox"/>	Application Review > NHSC LRP	Document Review and Eligibility	REC: LIBBY, MATTHEW; App ID 451635; 2 Year Half Time; DO; HPSA 16:16; DAB-No; Rank N/A	Unassigned	View	Run
<input type="checkbox"/>	Application Review > NHSC LRP	Document Review and Eligibility	Green, Jessica; App ID 450543; 3 Year Full-Time (Substance Use Disorder Workforce); SUD; HPSA 20:20; DAB-Yes; Rank 8	Unassigned	View	Run

Steps:

1. Analyst navigates to the task dashboard by clicking on the Task Dashboard button from any BMISS page.
2. Analyst will see the tasks associated with his/her role.
3. Analyst will select Run to pick up and begin the task that he/she selects.

Business Rules:

- The Process Name will show: Application Review > NHSC LRP
- The Task Name will show the step of review:
 - Document Review and Eligibility
- The Task Description will show the following information:
 - Applicant Name (Last Name, First Name)
 - Application ID
 - Application Type
 - Substance Use Disorder (SUD) applications will have this information displayed on the task description
 - Discipline
 - HPSA (locked HPSA Score : highest HPSA score)
 - DAB (Yes/No)
- The Owner will show Unassigned until it is run by an analyst
- Analyst can select View to see a read-only version of the verifications made for the applicant at this point.
- Using the View functionality is role-based

Section 8b: Document Review Verifications

Once an analyst runs a task at the Document Review and Eligibility step (first step of review), he/she will be directed to the first section of review: Document Review.

The screenshot displays the 'Document Review' interface. At the top, there is a navigation bar with four steps: 'Document Review', 'Application Information', 'Employment', and 'Review & Submit'. A 'Supporting Documents' link is located on the right. Below the navigation bar, the 'General Supporting Documents' section is visible. It contains three document verification entries:

Document	Submitted Date	Entered By
webster degree_0001.pdf	02/12/2019	Applicant
What is the status of the Eligible Health Professional Degree?		
<input checked="" type="radio"/> Did Not Check <input type="radio"/> Complete Eligible <input type="radio"/> Complete Ineligible <input type="radio"/> Incomplete		

Document	Submitted Date	Entered By
birth certificate_0001.pdf	02/12/2019	Applicant
What is the status of the Proof of U.S. Citizenship or U.S. National?		
<input checked="" type="radio"/> Did Not Check <input type="radio"/> Complete Eligible <input type="radio"/> Complete Ineligible <input type="radio"/> Incomplete		

Document	Submitted Date	Entered By
verification background.pdf	02/11/2019	Applicant
What is the status of the Verification of Disadvantaged Background/Exceptional Financial Need?		
<input checked="" type="radio"/> Did Not Check <input type="radio"/> Complete Eligible <input type="radio"/> Complete Ineligible <input type="radio"/> Incomplete		

Steps:

1. Analyst reviews the eligibility and completeness of each document
2. Analyst selects the appropriate status for each document
3. Analyst uploads the credit report
4. Analyst enters comments
5. Analyst selects Save & Continue

Business Rules:

- The status of each document will default to "Did Not Check."
- The System will always display the Proof of US Citizenship or US National document and status questions.
- The Verification of Existing Service table and status questions will only appear if the applicant responded that he/she has an existing service obligation.

- The applicant's response to being a member of the reserves from the Online Application will be displayed in read-only text under the Verification of Existing Service documentation (if applicable).
- The Proof of Payment History table and status questions will only appear if an applicant was a previous NHSC LRP applicant.
 - If an applicant did not upload the optional Proof of Payment History document on the online application, the analyst will be required to upload this document on the Document Review screen.
- The Disadvantaged Background/Exceptional Financial Need document will be present only if the applicant has selected yes to this question on the application and uploaded a document.
 - Analyst will be required to confirm if the applicant has a disadvantaged background.
 - Verification of an applicant's disadvantaged background will not affect an applicant's eligibility. Any changes to this verification will be reflected on the application banner.
- Substance Use Disorder (SUD) specific documents include the following:
 - Eligible Health Professional Degree (Required to be uploaded by all SUD applicants and may affect an applicant's eligibility)
- Substance Use Disorder Licensure or Certification (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Data 2000 Waiver (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Analysts can continue with the other sections of review before completing the Document Review section, but will not be able to submit the task until the Document Review section is complete.
- Analysts will not be required to upload the credit report if a document has been made the application ineligible or incomplete.
- Comments are required if a document is deemed ineligible or incomplete.
- All documents will open in a new window.
- The Entered By and Submitted Date will be shown for each document.
 - Entered By will show who (analyst or applicant) uploaded the document.
 - Submitted Date will show the date the document was uploaded.
- Analysts have the option to save for later by selecting Save.
 - This action will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Substance Use Disorder Licensure or Certification

Document	Submitted Date	Entered By
sc asoc alcohol licencs cac_0001.pdf	02/11/2019	Applicant

What is the status of the Substance Use Disorder Licensure or Certification?

Did Not Check Complete Eligible Complete Ineligible Incomplete

Credit Report

Document	Submitted Date	Entered By
AA_Test_Document.pdf	02/27/2019	hrsa_zeshawn_uddin

Comments

New Comments

Comment goes here.

Existing Comments

There are no existing comments.

Section 8c: Application Information Review

After reviewing the Documents, analysts will review any questions which were added to the application on the Application Information page. The Application Information review page will only appear during review for application types which displayed questions on the application. If no questions were asked, this page will not display during review.

Application Information Review

Document Review Application Information Employment Review & Submit Supporting Documents

Application Information

1. Do you provide substance use disorder services (e.g. Buprenorphine treatment or substance use disorder counseling) at your site? Yes, Substance Abuse Counseling

2. Are you licensed or certified in your state to provide substance use disorder services? If yes, please upload your credentials in the Supporting Documents section. Yes

3. Do you possess a DATA 2000 waiver? If yes, please upload your waiver in the Supporting Documents section. No

4. Will you have substance use disorder training or certification completed by July 18, 2019? Yes

5. I am applying to work at a NHSC-approved site because of the: (Check all that apply)

Loan repayment incentive

Substance Use Disorder treatment incentive

Opportunity to work with an underserved population

Interest in working in an underserved area

Opportunity to serve in a rural area

Location relative to my home community

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? * Yes No

Based on the answers above, do you recommend continuing review for this applicant? * Yes No

Comments

New Comments

Existing Comments

Steps:

1. Analyst reviews the answers displayed on the Application Information review page.
2. Analysts selects Yes or No to the required review question(s) on the page.
3. Analyst leaves a comment if necessary.

Business Rules:

- The Application Information review page will only appear during review for application types which displayed questions on the application. (If no questions were asked, this page will not display during review)
- Answers to questions will be in read-only format. Applicant will be unable to make changes to applicant responses.
- For Substance Use Disorder (SUD) applicants analysts will be required to indicate whether an applicant meets their current tier requirement.
 - A selection of Yes indicated that the analyst reviewed the responses to the questions and documents from the previous page to determine eligibility to predefined tiering requirements.
 - A selection of No will change Tier 1 and Tier 2 applicants to Tier 3 and direct applications to exception review.
 - Tier 3 applicants who do not meet their requirements will only be directed to exception review. No change to the Tier will be made.
- Analyst will be required to indicate whether the application should continue through review.
 - If the analyst selects 'No' to the review question, the application will still continue to 'Verification' review.
- Review question(s) does not affect application eligibility.

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? * Yes No

Based on the answers above, do you recommend continuing review for this applicant? * Yes No

Comments

New Comments

Comment goes here. |

Existing Comments

There are no existing comments.

Section 8d: Employment Verifications

After reviewing the Documents, Document Review and Eligibility analysts will review the Employment Verifications.

The screenshot shows the 'Employment Verifications' page in a web application. At the top, there is a breadcrumb trail: 'Document Review' > 'Application Information' > 'Employment' > 'Review & Submit'. A 'Supporting Documents' link is visible in the top right. Below the breadcrumb, a table titled 'Employment Verifications' contains one row of data:

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

Below the table, a message states: 'No action is required on the Employment page. Please reference the Employment Verification table for further information.'

The 'License' section includes a table with columns 'Document', 'Submitted Date', and 'Entered By'. Below this table is a text input field with a 'Browse...' button and an 'Upload' button.

The 'Comments' section has a 'New Comments' label and a text input field. Below it, the 'Existing Comments' section shows the message 'There are no existing comments.'

At the bottom of the form, there are two buttons: 'Save & Continue' and 'Save'.

Steps:

1. Analyst reviews the Employment Verification Form by clicking on the Completed Date in the Employment Verification table
2. Analyst uploads the NPDB report, if required.
3. Analyst uploads the license document, if required.
4. Analyst enters comments.
5. Analyst selects Save & Continue.

Business Rules:

- The NPDB upload functionality will only be available and required if:
 - The applicant's Site POC indicated during the Employment Verification that a NPDB report was never run for the applicant.
 - The applicant's site POC indicated during the Employment Verification that a NPDB report was run for the applicant, but the date of the last check was greater than 18 months of the application deadline.

- Text reading “No action is required on the Employment page. Please reference the Employment Verification table for further information.” will be displayed if there is no further action required from the Document Review and Eligibility analyst.
- No action will be required if the Site POC indicated that a NPDB report was run for the applicant and the date of the last check was within 18 months of the application deadline.
- The HPSA score in the Employment Verification table will display the current HPSA score for the site in BMISS.
- This HPSA score can change if the highest HPSA score of the applicant’s discipline changes.
- The analyst can view the Employment Verification Form by clicking on the Completed Date from the Employment Verification table.
- The analyst can identify if an applicant is serving as a PPO if one or a combination of the following verification questions are responded as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = No
 - Is the applicant/participant a contractor? = Yes
 - Does the applicant/participant own or have a financial interest in the site identified above? = Yes
 - Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = No
- The analyst can identify if an applicant is serving as a non- PPO if all of the following verification questions are responded as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = Yes
 - Is the applicant/participant a contractor? = No
 - Does the applicant/participant own or have a financial interest in the site identified above? = No
 - Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = Yes
 - The Employment Verification Form will be read-only and show all of the Site POC responses
- Analyst can click on the site name in the Employment Verification Form to be directed to the Site Profile in BMISS
- Analysts have the option to save for later by selecting Save
- This will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Employment Verification for at Tandem Health - 1278 Lafayette

Submitted On	Status	Date Completed	Site
01/08/2019	Complete	01/14/2019	Tandem Health - 1278 Lafayette

▼ Applicant Information

Is Jessica Green currently working, or will work, at Substance Use Disorder Professional - None at Tandem Health - 1278 Lafayette?	Yes
Does Jessica Green have a current, full, permanent, unencumbered, and unrestricted license to practice at this site?	Yes

▼ Employment Information

When did or will Jessica Green begin to practice and meet the NHSC service requirements at Tandem Health - 1278 Lafayette?	02/04/2019
Does/will Jessica Green meet the NHSC Substance Use Disorder Workforce Practice Requirements for full-time participants? Please review the limitations on teaching/supervising, administrative activities and service provided at alternate settings.	Yes
Total hours Jessica Green works per week at your site per the NHSC Clinical Practice Requirements	40.00

▼ Service Type Verifications

Does your organization, or the entity with whom you have an agreement to provide healthcare services at Tandem Health - 1278 Lafayette ensure that Jessica Green	Yes
<ul style="list-style-type: none">Upholds the personnel system and employment policies of the site; ANDIs paid an annual income, equal to or greater than the minimum paid to Federal civil servants practicing with the same discipline/specialty?	
Does Jessica Green provide services at Tandem Health - 1278 Lafayette as a self-employed worker or independent contractor?	No
Does Jessica Green own or have a financial interest in Tandem Health - 1278 Lafayette?	No
Does Tandem Health - 1278 Lafayette provide Jessica Green or the organization with whom you have an agreement to provide healthcare services at your site provide Jessica Green with malpractice insurance and tail coverage (either commercially or through the Federal Tort Claims Act)?	Yes
Does/will Jessica Green provide clinical services at any of the following NHSC-approved sites?	Yes

Section 8e: Review & Submit

When an analyst has completed review for an applicant, he/she will need to submit the task from the Review & Submit screen.

Review & Submit

Document Review Application Information Employment Review & Submit Supporting Documents

▼ Document Review - Eligible

General Supporting Documents

Document Type	Document Name	Status
Eligible Health Professional Degree	webster degree_0001.pdf	Complete Eligible
Proof of U.S. Citizenship or U.S. National	birth certificate_0001.pdf	Complete Eligible
Verification of Disadvantaged Background/Exceptional Financial Need	verification background.pdf	
Substance Use Disorder Licensure or Certification	sc asoc alcohol licencs cac_0001.pdf	Complete Eligible
Credit Report	AA_Test_Document.pdf	

Deemed Eligible by hrsa_zeshawn_uddin on 02/27/2019 03:40:01 PM EST.
[View Comments](#)

▶ Application Information Verification - Eligible

▶ Employment Verification - Eligible

Overall Application Status

Overall Status: Eligible
Application status upon submission: Under Verification Review (Not Started)

Steps:

1. Analyst reviews the information they have verified.
2. Analyst enters comments.
3. Analyst selects Submit.

Business Rules:

- The status of each section will be displayed next to the section name.
 - Section statuses include:
 - Not Reviewed
 - Eligible
 - Ineligible
 - Incomplete
- Each section is expandable/collapsible.

- Analyst can click on any document in the Document Review section and the document will open in a new window.
- The status the analyst gave for each document will be displayed in the Document Review table.
- Analyst can click on the Completed Date in the Employment Verification table to view the Employment Verification Form.
- Analysts can select View Comments to see all comments entered for each section.
- The status of the section, analyst who reviewed the section, and date and time that the section was
- The overall status of the application will be displayed at the bottom of the page.
- The application status upon submission of the task will be displayed at the bottom of the page.
- Comments are required to submit the task.
- If any of the documents in the Document Review section are deemed ineligible or incomplete, the task will be deemed ineligible or incomplete upon submission of the task and the task will be terminated. The task will become available on the Recommence tab of Review Planning.
 - Note: An ineligible status trumps an incomplete status.
- The Employment Verification Section does not need to be completed if a document was deemed ineligible or incomplete.
- All documents must be reviewed in order to submit the task.
- All documents must be reviewed, even if a document has been deemed ineligible or incomplete.
- If the applicant is eligible upon submission of the task, the task will move to the task list for Verification Review.
 - All sections must be completed to submit the task for Verification Review.
 - No section can have a status of “Not Reviewed.”
- Analysts have the option to save for later by selecting Save for Later.
 - Selecting Save for Later will not submit the task. Analysts must select Submit to submit the task.

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? Yes

Based on the answers above, do you recommend continuing review for this applicant? Yes

Deemed Eligible by hrsa_zeshawn_uddin on 02/27/2019 03:40:07 PM EST.

[View Comments](#)

▼ Employment Verification - Eligible

Employment Verifications

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

Deemed Eligible by hrsa_zeshawn_uddin on 02/27/2019 03:47:11 PM EST.

[View Comments](#)

Overall Application Status

Overall Status: Eligible

Application status upon submission: Under Verification Review (Not Started)

Comments

New Comments

Existing Comments

There are no existing comments.

[Submit](#) [Save](#)

Section 9: Step 2 – Verification Review

After a task is submitted eligibly from Document Review and Eligibility, the task will become available in the task dashboard for the second step of review: Verification Review.

<input type="checkbox"/>	Application Review > NHSC LRP	Verification Review	Green, Jessica; App ID 450543; 3 Year Full-Time (Substance Use Disorder Workforce); SUD; HPSA 20:20; DAB-Yes; Rank 8	Unassigned	View	Run
--------------------------	-------------------------------	---------------------	--	------------	----------------------	---------------------

Steps:

1. Analyst navigates to the task dashboard by clicking on the Task Dashboard button from any BMISS page.
2. Analyst will see the tasks associated with his/her role.
3. Analyst will select Run to pick up a task and start review for the task.

Business Rules:

- The Process Name will show: Application Review > NHSC LRP
- The Task Name will show the step of review:

- Verification Review
- The Task Description will show the following information:
 - Applicant Name (Last Name, First Name)
 - Application ID
 - Application Type
 - Discipline
 - HPSA (locked HPSA Score : highest HPSA score)
 - DAB (Yes/No)
- The Owner will show Unassigned until it is run by an analyst.
- Analyst can select View to see a read-only version of the verifications made for the applicant at this point.
 - View functionality is role-based.

Section 9a: Document Review Verifications

Once an analyst runs a task at Verification Review (second step of review), they will be directed to the first section of review: Document Review.

Document Review

Supporting Documents

[Document Review](#)
[Application Information](#)
[Employment](#)
[Loans](#)
[Review & Submit](#)

General Supporting Documents

Eligible Health Professional Degree

Document	Submitted Date	Entered By
webster degree_0001.pdf	02/12/2019	Applicant

What is the status of the Eligible Health Professional Degree?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Proof of U.S. Citizenship or U.S. National

Document	Submitted Date	Entered By
birth certificate_0001.pdf	02/12/2019	Applicant

What is the status of the Proof of U.S. Citizenship or U.S. National?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Verification of Disadvantaged Background/Exceptional Financial Need

Document	Submitted Date	Entered By
verification background.pdf	02/11/2019	Applicant

What is the status of the Verification of Disadvantaged Background/Exceptional Financial Need?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Substance Use Disorder Licensure or Certification

Document	Submitted Date	Entered By

Steps:

1. Analyst reviews the eligibility and completeness of each document.
 - a. The verifications made by the Document Review and Eligibility analyst for each document will be displayed. The Verification Reviewer can make any updates to the status of the documents.
2. Analyst reviews the credit report.
3. Analyst verifies the recommendation of the credit report.
4. Analyst enters comments.
5. Analyst selects Save & Continue.

Business Rules:

- All document statuses will default to the verifications entered by the Document Review and Eligibility analyst.
- The System will always display the Proof of US Citizenship or US National document displayed as read-only text under the Verification of Existing Service documentation (if applicable).
- The Verification of Existing Service document will only appear if the applicant responded that he/she has an existing service and then uploaded the existing service document.
- The Proof of Payment History table will only appear if an applicant was a prior previous NHSC LRP applicant.
- If an applicant does not upload the option Proof of Payment History on the online application, the analyst will be required to upload this document on the Document Review screen.
- The Disadvantaged Background/Exceptional Financial Need document will be present only if the applicant has selected yes to this question on the application and uploaded a document.
- Verification of an applicant's disadvantaged background will not affect an applicant's eligibility. Changes made by the analyst to the applicant's disadvantaged background status will be reflected on the banner.
- Substance Use Disorder (SUD) specific documents include the following:
 - Eligible Health Professional Degree (Required to be uploaded by all SUD applicants and may affect an applicant's eligibility)
- Substance Use Disorder Licensure or Certification (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Data 2000 Waiver (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Analysts can continue with the other sections of review without completing the Document Review section, but will not be able to submit the task until completing the Document Review section.
- Comments are required if a document is made ineligible or incomplete.
- Comments are required if the analyst indicates that he/she does not recommend the applicant for award based on the credit report.
- All documents will open in a new window.
- The Entered By and Submitted Date will be shown for each document.
- Entered By will show who (analyst or applicant) uploaded the document.
- Submitted Date will show the date the document was uploaded.

- Analysts have the option to save for later by selecting Save.
- Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Substance Use Disorder Licensure or Certification

Document	Submitted Date	Entered By
sc_asoc_alcohol_licencs_cac_0001.pdf	02/11/2019	Applicant

What is the status of the Substance Use Disorder Licensure or Certification?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Credit Report

Document	Submitted Date	Entered By
AA_Test_Document.pdf	02/27/2019	hrsa_zeshawn_uddin

Based on the credit report, do you recommend this applicant?

Yes
 No

Comments

New Comments

Existing Comments

Wednesday, February 27, 2019 hrsa_zeshawn_uddin at 03:30:21 PM entered a Document Review Page Comment:
Comment goes here.

Section 9b: Application Information Review

After reviewing the Documents, Verification Review analysts will review any questions which were added to the application on the Application Information page. The Application Information review page will only appear during review for application types which displayed questions on the application. If no questions were asked, this page will not display during review.

Application Information Review

Document Review Application Information Employment Loans Review & Submit Supporting Documents

Application Information

1. Do you provide substance use disorder services (e.g. Buprenorphine treatment or substance use disorder counseling) at your site? Yes, Substance Abuse Counseling

2. Are you licensed or certified in your state to provide substance use disorder services? If yes, please upload your credentials in the Supporting Documents section. Yes

3. Do you possess a DATA 2000 waiver? If yes, please upload your waiver in the Supporting Documents section. No

4. Will you have substance use disorder training or certification completed by July 18, 2019? Yes

5. I am applying to work at a NHSC-approved site because of the: (Check all that apply)

- Loan repayment incentive
- Substance Use Disorder treatment incentive
- Opportunity to work with an underserved population
- Interest in working in an underserved area
- Opportunity to serve in a rural area
- Location relative to my home community

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? * Yes No

Based on the answers above, do you recommend continuing review for this applicant? * Yes No

Comments

New Comments

Steps:

1. Analyst reviews the answers displayed on the Application Information review page.
2. Analysts confirm the Yes or No answer(s) provided during Document Review and Eligibility. Analyst will have the ability to change the previous response(s).
3. Analyst leaves a comment if necessary.

Business Rules:

- The Application Information review page will only appear during review for application types which displayed questions on the application. (If no questions were asked, this page will not display during review)
- Answers to questions will be in read-only format. Applicant will be unable to make changes to applicant responses.
- For Substance Use Disorder (SUD) applicants analysts will be required to indicate whether an applicant meets their current tier requirement.

- A selection of Yes indicated that the analyst reviewed the responses to the questions and documents from the previous page to determine eligibility to predefined tiering requirements.
- A selection of No will change Tier 1 and Tier 2 applicants to Tier 3 and direct applications to exception review.
 - Tier 3 applicants who do not meet their requirements will only be directed to exception review. No change to the Tier will be made.
- Analyst will confirm whether the application should continue through review.
 - If the analyst selects 'No' to the review question, the application will be marked to go to 'Exception' review.
- Review question(s) does not affect application eligibility.

Section 9c: Employment Verification

After reviewing the Documents, Verification Review analysts will review the Employment Verifications.

Employment Verifications

[Document Review](#)
[Application Information](#)
[Employment](#)
[Loans](#)
[Review & Submit](#)
[Supporting Documents](#)

Employment Verifications

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

National Practitioner Data Bank

Was an adverse incident reported by the site? • Tandem Health - 1278 Lafayette : No

License

Document	Submitted Date	Entered By
<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

New Comments

Existing Comments

There are no existing comments.

Steps:

1. Analyst reviews the Employment Verification Form by clicking on the Completed Date in the Employment Verification table (see screenshot on next page).

2. Analyst verifies if there is an adverse incident based on the NPDB report, if the NPDB report was uploaded by the Document Review and Eligibility Analyst.
 - a. This verification will only be displayed and required if the Document Review and Eligibility analyst uploaded the NPDB report.
3. Analyst verifies whether the applicant is authorized to practice in the state where they work in pursuant to the licensure requirements.
4. This verification will only be displayed and required if the applicant's licensed state does not match the state of his/her employment site.
5. Analyst enters comments.
6. Analyst selects Save & Continue.

Business Rules:

- The adverse incident verification will only be displayed and required if the Document Review and Eligibility analyst was required to upload an NPDB report.
- If an adverse incident was reported by the Site POC during the Employment Verification, the response will be displayed as read-only text, only if the Document Review and Eligibility analyst was not required to upload the NPDB report.
 - There will not be an additional question for the Verification Analyst to review regarding the NPDB report in this situation.
- The NPDB report uploaded by either the Document Review and Eligibility analyst or the Site POC (if available) will be displayed and linked.
- The person (analyst or site POC) that uploaded the NPDB report will be listed.
- The Verification Analyst will be required to verify if the applicant is eligible or ineligible based on the licensure requirement, if the applicant's licensed state does not match the state of his/her employment site.
 - If the licensed state and site state match, this question will not appear in the Employment Verification section.
- Comments are required if the analyst verifies the following:
 - Adverse incident= Yes
 - License state/Site state mismatch = Ineligible
- The HPSA score in the Employment Verification table will display the current HPSA site score in BMISS.
 - This score can change if the highest HPSA score is changed internally in BMISS.
 - For Substance Use Disorder (SUD) applicants HPSA score is based on the policy that the highest (Primary Care or Mental Health) for a given site shall appear.
- The Employment Verification Form will be read-only text and display all of the Site POC responses.
- The analyst can view the Employment Verification Form by clicking on the Completed Date from the Employment Verification table.
- The analyst can identify if an applicant is serving as a PPO if one or a combination of the following verification responses are as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = No
 - Is the applicant/participant a contractor? = Yes

- Does the applicant/participant own or have a financial interest in the site identified above? = Yes
- Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = No
- The analyst can identify if an applicant is serving as a non-PPO if all of the following verification responses are as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = Yes
 - Is the applicant/participant a contractor? = No
 - Does the applicant/participant own or have a financial interest in the site identified above? = No
 - Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = Yes
- Analyst can click on the site name in the Employment Verification Form to be directed to the Site Profile in BMISS.
- Analysts have the option to save for later by selecting Save.
- Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.
-

Employment Verification for at Tandem Health - 1278 Lafayette

Submitted On	Status	Date Completed	Site
01/08/2019	Complete	01/14/2019	Tandem Health - 1278 Lafayette

▼ Applicant Information

Is Jessica Green currently working, or will work, at Substance Use Disorder Professional - None at Tandem Health - 1278 Lafayette? Yes

Does Jessica Green have a current, full, permanent, unencumbered, and unrestricted license to practice at this site? Yes

▼ Employment Information

When did or will Jessica Green begin to practice and meet the NHSC service requirements at Tandem Health - 1278 Lafayette? 02/04/2019

Does/will Jessica Green meet the NHSC Substance Use Disorder Workforce Practice Requirements for full-time participants? Please review the limitations on teaching/supervising, administrative activities and service provided at alternate settings. Yes

Total hours Jessica Green works per week at your site per the NHSC Clinical Practice Requirements 40.00

▼ Service Type Verifications

Does your organization, or the entity with whom you have an agreement to provide healthcare services at Tandem Health - 1278 Lafayette ensure that Jessica Green

- Upholds the personnel system and employment policies of the site; AND
- Is paid an annual income, equal to or greater than the minimum paid to Federal civil servants practicing with the same discipline/specialty?

Yes

Does Jessica Green provide services at Tandem Health - 1278 Lafayette as a self-employed worker or independent contractor? No

Does Jessica Green own or have a financial interest in Tandem Health - 1278 Lafayette? No

Does Tandem Health - 1278 Lafayette provide Jessica Green or the organization with whom you have an agreement to provide healthcare services at your site provide Jessica Green with malpractice insurance and tail coverage (either commercially or through the Federal Tort Claims Act)? Yes

Section 9d: Loan Verifications

After reviewing the employment verifications, the Verification Analyst will review the loan verifications.

Electronic Loan Steps:

1. Analyst selects a loan from the Electronic loan table by clicking on the Servicer Lender name.
2. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
3. Analyst determines if manual verification is needed or returns to the Loan Summary page.
4. If manual verification is required, analyst answers “Yes” to “Does this loan require a manual review?”
5. Analyst verifies the loan information.
6. Analyst enters comment.
7. Analyst selects Submit.
8. System re-directs analyst to the Loan Summary page.
9. If no manual verification is required or if manual verification is complete the analyst will then deem loan “Eligible” for award by checking the box next to each “Qualified” loan on the Loan Summary page.
10. Analyst repeats steps 1-9 for each electronic loan submitted.
11. Analyst enters comments.
12. Analyst selects Save & Continue.

Loan Verifications

⚠ One or more of the Electronic loan's Current Balance As of Date is greater than 30 days from application submission date.

Document Review Application Information Employment Loans Review & Submit Supporting Documents

Electronically Retrieved Loans from U.S. Department of Education Add Loan

<input type="checkbox"/>	Servicer	Loan Type	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$4,497.00			05/18/2016	Qualified	system
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$12,054.00			07/07/2015	Qualified	system
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$8,584.00			01/30/2015	Qualified	system
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$21,659.00			05/29/2014	Qualified	system
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$5,864.00			11/13/2012	Qualified	system
<input type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT CONSOLIDATED SUBSIDIZED	\$3,343.00			07/13/2012	Qualified	system

Manual Loan Steps:

1. Analyst selects a loan from the Loan table by clicking on the Servicer Lender name.
2. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
3. Analyst verifies the loan information.
4. Analyst enters comments.
5. Analyst selects Submit.
6. System re-directs analyst to the Loan Summary page.
7. Analyst repeats steps 1-6 for each loan submitted.
8. Analyst will have the option to add a new loan if necessary
9. Analyst enters comments.
10. Analyst selects Save & Continue.

Manually Added Loans							
Servicer	Account Number	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
First Mark Services	002329692-15	\$763.00			05/25/2007	Not Reviewed	
FedLoan Servicing	11-1884521998	\$6,304.00			01/22/2019	Not Reviewed	
FedLoan Servicing	10-1884521998	\$3,837.00			09/04/2018	Not Reviewed	
FedLoan Servicing	9-1884521998	\$13,808.00			06/09/2017	Not Reviewed	
FedLoan Servicing	8-1884521998	\$4,455.00			08/09/2016	Not Reviewed	
FedLoan Servicing	7-1884521998	\$3,205.00			05/03/2016	Not Reviewed	
FedLoan Servicing	6-1884521998	\$17,295.00			08/11/2015	Not Reviewed	
FedLoan Servicing	4-1884521998	\$48,370.76			06/05/2015	Not Reviewed	
FedLoan Servicing	5-1884521998	\$33,724.24			06/05/2015	Not Reviewed	

Total Eligible Manual Loans Amount	\$131,762.00
Total Verified Manual Loans Amount	\$0.00

All Loans Totals	
Total Pre-verified Loan Amount	\$131,762.00
Total Verified Loan Amount	\$0.00
Award Amount	\$75,000.00

Loan Details for Loan Account # 002329692-15

[← Back to Loans](#)

Documents for this Section

Document Title	Document File	Verification
Account Statement	FirstMark Loans.PDF	<input checked="" type="radio"/> Did Not Check <input type="radio"/> Complete <input type="radio"/> Incomplete
Disbursement Report	fed aid report.pdf	<input checked="" type="radio"/> Did Not Check <input type="radio"/> Complete <input type="radio"/> Incomplete


Servicing Lender Information

Servicing Lender: First Mark Services

Balance Information

Loan account number: 002329692-15
Original date of the loan: 5/25/2007
Original amount of the loan: \$800.00
Current balance (Principle & accrued Interest): \$763.00 as of 01/18/2019
Type of loan: PRIVATE LOAN (NON-FEDERAL)
Is this loan in default? No
Is this Loan under Federal court judgment? No
Interest rate: 6.500%
Purpose of loan: Tuition
Is this a consolidated loan? No

Verified Information

Is all required loan information complete? Yes No
Is this loan eligible for repayment? Yes No
Verified Current Balance *
Verified Interest Rate *
Verified By * Phone Automation Servicing Lender Rep Supporting Documents
Verification Date * 

Comments

New Comments

Existing Comments

There are no existing comments.

Business Rules:

- The electronic loan table will include the following information:
 - Servicer Lender name
 - Loan Type
 - Current Balance
 - Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
- The following are possible electronic loan statuses:
 - Qualified
 - Eligible
 - Ineligible
- Electronic loan statuses will default to “Qualified” or “Ineligible” based on loan status.
- The electronic loan statuses with an asterisk (*) are identified as having been defaulted in the past.
- Electronic loans are by default verified by “system”.
- The Verified by column will only be updated with an analysts name once the loan has been manually verified on the Loan Details page.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans with an “As of Date” greater than 30 days from the applications submission date.
- An alert will be present at the top of the Loan Summary page when the application’s Total Pre-verified Loan Amount is below the maximum award amount for their contract type.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans that had previously been in default.
- The manual loan table will include the following information:
 - Servicer Lender name
 - Account Number
 - Current Balance o Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
- The following are possible manual loan statuses:
 - Not Reviewed
 - Eligible
 - Ineligible
 - Incomplete
- Manual loan statuses will default to “Not Reviewed.”
- The Current Balance column will list the current loan balance retrieved electronically or manually entered by the applicant on the application.

- The Verified Amount column will be blank until the loan has been manually verified by an analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Amount will display “\$0.00” for manually entered loans
 - The Verified Interest Rate column will be blank until the loan has been manually verified by analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Interest Rate will display “0.000%” for manually entered loans
- The Total Pre-verified Loan Amount will display the sum of the Total Qualified DoED Loan Amount and the Total Eligible Manual Loans Amount submitted on the application.
- The Total Verified Loan Amount will reflect the total sum of verified DoED and manual loan amounts and will be updated as the analyst reviews each loan.
- The Award Amount will reflect the total award calculated based on the verified loans and application type upon submitting the loan page.
 - The Award Amount will vary depending on the application type
- Analysts will be required to verify the completion of each document for each manual loan submitted.
 - Please note that the completion of the documents will not determine the overall completeness of loan information.
- The documents uploaded for each loan will be linked on the loan details page.
- If an analyst adds a new loan, the documents displayed on the loan details page will need to be verified for completion.
- If an analyst uploads a loan document from the Application Profile, the document will be displayed on the loan details page.
 - Completion for this document will not be required.
- All loan information electronically retrieved or manually entered by the applicant will be displayed in read-only text.
- If the analyst indicates an electronic loan requires manual verification, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For all federal PLUS loans an additional question and corresponding answer will be present on the loans details page.
- For manually entered loans, if an analyst indicates “Yes” to all loan information being complete, the analyst will be required to verify if the loan is eligible.
- For manually entered loans, if the analyst indicates “Yes” to the loan being eligible for repayment, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For both electronic and manual loans the Verification date cannot be in the future.

- If the analyst verifies that the manually entered loan information is not complete, the loan will be deemed incomplete.
- If the analyst verifies that the manually entered loan information is not eligible, the loan will be deemed ineligible.
- Electronic loans can only be deemed eligible using the check boxes on the Loan Summary page.
- Comments are required if a manually entered loan is deemed ineligible or incomplete.
- The applicant will be sent to exception review if there are no eligible or complete loans.
- Analysts have the option to save for later by selecting Save on the Loan Summary Page and Loan Details Page. Selecting Save will not update the status of the section or loan to be completed. Analysts must select Save & Continue to deem the section or loan complete.

Section 9e: Review & Submit

When an analyst has completed review for an applicant, he/she will need to submit the task from the Review & Submit screen.

Review & Submit

Document Review Application Information Employment Loans Review & Submit Supporting Documents

Document Review - Eligible

Application Information Verification - Eligible

Employment Verification - Eligible

Loan Verifications - Eligible

Overall Application Status

Overall Status: Eligible

Application status upon submission: Under Quality Review (Not Started)

Comments

New Comments

Existing Comments

Wednesday, February 27, 2019 hrsa_zeshawn_uddin at 04:54:55 PM entered a Review and Submit Eligibility Page Comment:
TEST

Steps:

1. Analyst reviews the information he/she has verified.
2. Analyst enters comments.
3. Analyst selects Submit.

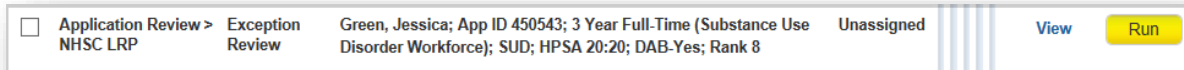
Business Rules:

- The status of each section will be displayed next to the section name.
 - Section statuses include:
 - Not Reviewed
 - Eligible
 - Ineligible
 - Incomplete
- Each section is expandable/collapsible.

- Analyst can click on any document in the Document Review section and the document will open in a new window.
- The most recent status the analyst gave each document will be displayed in the Document Review table.
- Analyst can click on the Completed Date in the Employment Verification table to view the Employment Verification Form.
- Analyst can click on any of the loans to view the verified loan detail information.
 - Loan documents will be available within the loan details if present.
- The most recent status of the section, most recent analyst who reviewed the section, and most recent date and time that the section was reviewed will be displayed within each section.
- Analysts can select View Comments to see all comments entered for each section.
- The overall status of the application will be displayed at the bottom of the page.
- The application status upon submission of the task will be displayed at the bottom of the page.
- Comments are required to submit the task.
- If any of the documents in the Document Review section are deemed ineligible or incomplete, the task will be deemed ineligible or incomplete upon submission and the task will be terminated.
 - The task will be available on the Recommence tab of Review Planning
 - Note: An ineligible status trumps an incomplete status.
- If a section is deemed ineligible or incomplete, the analyst can submit the task for Exception Review without completing the remaining sections.
 - Analysts must always complete the Document Review section, even if a section has been deemed ineligible or incomplete.
- If all sections that have been reviewed are deemed eligible, the analyst must complete all sections of review in order to submit the task.
- The task will be sent to Exception Review (Step 3.A) if at least one of the following is true:
 - Credit report is not recommended.
 - An adverse incident was reported by the analyst.
 - An adverse incident was reported by one or more Site POCs.
 - License state/site state mismatch is deemed ineligible.
 - All loans are ineligible or incomplete.
 - Analyst determines application should not continue based on review of the Application Information page.
 - Analyst requests for the task to be sent to Exception Review.
- The option to request for the task to be sent to Exception Review will only be available if the task will not be sent to Exception Review for any of the above reasons.
- The task will be sent to Quality Review (Step 3.B) if all sections are deemed Eligible.

Section 10: Step 3.A - Exception Review

After a task is submitted from Verification Review and has reason to be sent to Exception Review, the task will become available in the task dashboard for the third step of review: Exception Review.



Steps:

1. Analyst navigates to the task dashboard by clicking on the Task Dashboard button from any BMISS page.
2. Analyst will see the tasks associated with his/her role.
3. Analyst will select Run to pick up a task and start review of the task.

Business Rules:

- The Process Name will show: Application Review > NHSC LRP
- The Task Name will show the step of review:
 - Exception Review
- The Task Description will show the following information for Base and NP:
 - Applicant Name (Last Name, First Name)
 - Application ID
 - Application Type
 - Discipline
 - HPSA (locked HPSA Score : highest HPSA score)
 - DAB (Yes/No)
 - Reason
- The Owner will show Unassigned until it is run by an analyst
- Analyst can select View to see a read-only version of the verifications previously made for the application.
- Using the View functionality is role-based

Section 10a: Document Review Verifications

Once an analyst picks up a task at Exception Review (Step 3.A of review), they will be directed to the first section of review: Document Review.

The screenshot displays the 'Document Review' section of a web application. At the top, there is a navigation bar with tabs for 'Document Review', 'Application Information', 'Employment', 'Loans', and 'Review & Submit'. The 'Document Review' tab is active. Below the navigation bar, there is a section titled 'General Supporting Documents'. This section contains four document entries, each with a table of details and a status selection area.

Document	Submitted Date	Entered By
webster degree_0001.pdf	02/12/2019	Applicant

What is the status of the Eligible Health Professional Degree? Did Not Check Complete Eligible Complete Ineligible Incomplete

Document	Submitted Date	Entered By
birth certificate_0001.pdf	02/12/2019	Applicant

What is the status of the Proof of U.S. Citizenship or U.S. National? Did Not Check Complete Eligible Complete Ineligible Incomplete

Document	Submitted Date	Entered By
verification background.pdf	02/11/2019	Applicant

What is the status of the Verification of Disadvantaged Background/Exceptional Financial Need? Did Not Check Complete Eligible Complete Ineligible Incomplete

Document	Submitted Date	Entered By
----------	----------------	------------

Substance Use Disorder Licensure or Certification

Steps:

1. Analyst reviews the eligibility and completeness of each document.
 - a. The verifications made by the Verification Review Analyst for each document will be displayed. The Exception Review Analyst can make any updates to the status of the documents.
2. Analyst enters comments.
3. Analyst selects Save & Continue.

Business Rules:

- All document statuses will default to verifications made by the Verification Review analyst.
- The System will always display the Proof of US Citizenship or US National table.

- The Verification of Existing Service table will only appear if the applicant responded that he/she has an existing service and uploaded the existing service document.
 - The applicant's response to being a member of the reserves from the Online Application will be displayed as read-only text under the Verification of Existing Service documentation (if applicable).
- The Proof of Payment History table will only appear if an applicant was a previous NHSC LRP applicant.
 - If an applicant did not upload the optional Proof of Payment History document on the online application, the analyst will be required to upload this document on the Document Review screen.
- The Disadvantaged Background/Exceptional Financial Need document will be present only if the applicant has selected yes to this question on the application and uploaded a document.
- Verification of an applicant's disadvantaged background will not affect an applicant's eligibility. Changes made by the analyst to the applicant's disadvantaged background status will be reflected on the banner.
- Substance Use Disorder (SUD) specific documents include the following:
 - Eligible Health Professional Degree (Required to be uploaded by all SUD applicants and may affect an applicant's eligibility)
- Substance Use Disorder Licensure or Certification (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Data 2000 Waiver (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Analysts can continue with the other sections of review without completing the Document Review section, but will not be able to submit the task until the Document Review section is complete.
- Comments are required if a document is made ineligible or incomplete.
- Comments are required if the analyst indicates that he/she does not recommend the applicant for award based on the credit report.
- All documents will open in a new window.
- The Entered By and Submitted Date will be shown for each document.
 - Entered By will show who (analyst or applicant) uploaded the document.
 - Submitted Date will show the date the document was uploaded.
- Analysts have the option to save for later by selecting Save
 - Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Section 10b: Application Information Review

After reviewing the Documents, Exception Review analysts will review any questions which were added to the application on the Application Information page. The Application Information review page will only appear during review for application types which displayed questions on the application. If no questions were asked, this page will not display during review.

Application Information Review

[Document Review](#) [Application Information](#) [Employment](#) [Loans](#) [Review & Submit](#) [Supporting Documents](#)

Application Information

1. Do you provide substance use disorder services (e.g. Buprenorphine treatment or substance use disorder counseling) at your site? Yes, Substance Abuse Counseling

2. Are you licensed or certified in your state to provide substance use disorder services? If yes, please upload your credentials in the Supporting Documents section. Yes

3. Do you possess a DATA 2000 waiver? If yes, please upload your waiver in the Supporting Documents section. No

4. Will you have substance use disorder training or certification completed by July 18, 2019? Yes

5. I am applying to work at a NHSC-approved site because of the: (Check all that apply)

- Loan repayment incentive
- Substance Use Disorder treatment incentive
- Opportunity to work with an underserved population
- Interest in working in an underserved area
- Opportunity to serve in a rural area
- Location relative to my home community

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? * Yes No

Based on the answers above, do you recommend continuing review for this applicant? * Yes No

Comments

New Comments

Steps:

1. Analyst reviews the answers displayed on the Application Information review page.
2. Analysts confirm the Yes or No answer(s) provided during Document Review and Eligibility. Analyst will have the ability to change the previous response.
3. Analyst leaves a comment if necessary.

Business Rules:

- The Application Information review page will only appear during review for application types which displayed questions on the application. (If no questions were asked, this page will not display during review)
- Answers to questions will be in read-only format. Applicant will be unable to make changes to applicant responses.
- For Substance Use Disorder (SUD) applicants analysts will be required to indicate whether an applicant meets their current tier requirement.
 - A selection of Yes indicated that the analyst reviewed the responses to the questions and documents from the previous page to determine eligibility to predefined tiering requirements.
 - A selection of No will change Tier 1 and Tier 2 applicants to Tier 3.
 - Tier 3 applicants who do not meet their requirements will see no change to the tier.
- Analyst will confirm whether the application should continue through review.
- If the analyst selects 'No' to the review question(s), the application will still continue through review.
- Review of Application Information does not affect application eligibility.
- Application can be discontinued should Exception review analyst deem necessary.

Section 10c: Employment Verifications

After reviewing the Documents, Exception Review analysts will review the employment verifications.

The screenshot shows the 'Employment Verifications' page in a web application. At the top, there is a navigation bar with the following steps: Document Review, Application Information, Employment (highlighted), Loans, and Review & Submit. A 'Supporting Documents' link is also visible. Below the navigation bar, there is a table titled 'Employment Verifications' with the following data:

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

Below the table, there is a section titled 'National Practitioner Data Bank' with the question 'Was an adverse incident reported by the site?' and a dropdown menu showing 'Tandem Health - 1278 Lafayette : No'. Underneath is a 'License' section with a table for document tracking:

Document	Submitted Date	Entered By
<input type="text"/>		

There are 'Browse...' and 'Upload' buttons next to the document input field. Below this is a 'Comments' section with a 'New Comments' text area and an 'Existing Comments' section stating 'There are no existing comments.' At the bottom, there are 'Save & Continue' and 'Save' buttons.

Steps:

1. Analyst reviews the Employment Verification Form by clicking on the Completed Date in the Employment Verification table (see screenshot on next page).
2. Analyst verifies if the applicant is eligible based on the NPDB report
 - a. This verification will only be displayed if the Verification Review analyst or the Site POC(s) indicated that the NPDB report had an adverse incident.
 - b. Analyst will have the option to upload the NPDB Recommendation Document to support the applicant's eligibility.
3. Analyst verifies whether the applicant is authorized to practice in the state where he/she works in pursuant to the licensure requirements.
 - a. This verification will only be displayed if the applicant's license state does not match the state of the employment site.
4. Analyst enters comments.
5. Analyst selects Save & Continue.

Business Rules:

- The NPDB eligibility verification will only be displayed and required if the Verification Review analyst or the Site POC indicated that an adverse incident was reported.
- If the Verification Review analyst or Site POC indicated that no adverse incident was reported, this verification will not be displayed.
- The response of the Verification Review analyst or the Site POC in regards to the adverse incident will be displayed as read-only text.
- The NPDB report uploaded by either the Document Review and Eligibility analyst or the Site POC(s) will be displayed and linked (if applicable).
- The analyst or site POC that uploaded the NPDB report will be displayed (if applicable).
- If the Site POC ran the NPDB report within 18 months of the application deadline and indicated that there was no adverse incident reported on the Employment Verification Form, there will be no NPDB report uploaded and no additional verifications regarding the NPDB.
- The System will allow an analyst to upload the NPDB Recommendation Document to support the applicant's eligibility, if necessary.
- The Exception Review analyst will see the response to the License state/Site state eligibility verification from the Verification Review analyst, if it was required.
- Comments are required if the analyst provides the following verifications:
 - NPDB = Ineligible
 - License state/site state mismatch eligibility = Ineligible
- Comments are required for the License state/Site state mismatch verification if the Exception Review analyst changes this verification from Eligible to Ineligible.
- The HPSA score in the Employment Verification table will display the current HPSA site score in BMISS.
 - For Substance Use Disorder (SUD) applicants HPSA score is based on the policy that the highest (Primary Care or Mental Health) for a given site shall appear.
- This score can change if the highest HPSA score for the applicant's discipline changes internally.
- The analyst can view the Employment Verification Form by clicking on the Completed Date in the Employment Verification table.
- The Employment Verification Form will be read-only and show all Site POC responses.
- The analyst can identify if an applicant is serving as a PPO if one or a combination of the following verification questions are responded as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = No
 - Is the applicant/participant a contractor? = Yes
 - Does the applicant/participant own or have a financial interest in the site identified above? = Yes
 - Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = No
- The analyst can identify if an applicant is serving as a non-PPO if all of the following verification questions are responded as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = Yes
 - Is the applicant/participant a contractor? = No

- Does the applicant/participant own or have a financial interest in the site identified above? = No
- Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = Yes
- Analyst can click on the site name in the Employment Verification Form to be directed to the Site Profile in BMISS.
- Analysts have the option to save for later by selecting Save.
- Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Section 10d: Loan Verifications

After reviewing the employment verifications, the Exception Review analyst will review the loan verifications.

Electronic Loan Steps:

1. Analyst review loans verified by the Under Verification analyst.
2. Analyst selects a loan from the Electronic loan table by clicking on the Servicer Lender name.
3. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
4. Analyst determines if manual verification is needed or returns to the Loan Summary page.
5. If manual verification is required, analyst answers “Yes” to “Does this loan require a manual review?”
6. Analyst verifies the loan information.
7. Analyst enters comment.
8. Analyst selects Submit.
9. System re-directs analyst to the Loan Summary page.
10. If no manual verification is required or if manual verification is complete the analyst will then deem loan “Eligible” for award by checking the box next to each “Qualified” loan on the Loan Summary page.
11. Analyst repeats steps 1-10 for each electronic loan submitted.
12. Analyst enters comments.
13. Analyst selects Save & Continue.

Loan Verifications

⚠ One or more of the Electronic loan's Current Balance As of Date is greater than 30 days from application submission date.

➤ Document Review

➤ Application Information

➤ Employment

➤ Loans

➤ Review & Submit

Supporting Documents

Add Loan

Electronically Retrieved Loans from U.S. Department of Education

<input type="checkbox"/>	Servicer	Loan Type	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$4,497.00	\$4,497.00	5.840%	05/18/2016	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$12,054.00	\$12,054.00	5.840%	07/07/2015	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$8,584.00	\$8,584.00	6.210%	01/30/2015	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$21,659.00	\$21,659.00	5.410%	05/29/2014	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$5,864.00	\$5,864.00	6.800%	11/13/2012	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT CONSOLIDATED SUBSIDIZED	\$3,343.00	\$3,343.00	1.510%	07/13/2012	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT CONSOLIDATED SUBSIDIZED	\$6,986.00	\$6,986.00	1.510%	07/13/2012	Eligible	system

Manual Loan Steps:

1. Analyst review loans verified by the Under Verification analyst.
2. Analyst selects a loan from the Loan table by clicking on the Servicer Lender name.
3. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
4. Analyst verifies the loan information.
5. Analyst enters comments.
6. Analyst selects Submit.
7. System re-directs analyst to the Loan Summary page.
8. Analyst repeats steps 1-7 for each loan submitted.
9. Analyst will have the option to add a new loan if necessary
10. Analyst enters comments.
11. Analyst selects Save & Continue.

Loan Verifications

Document Review Application Information Employment Loans Review & Submit

Supporting Documents

There are no electronic loans available.

Add Loan

Total Qualified DoED Loan Amount	\$0.00
Total Verified DoED Loan Amount	\$0.00

Manually Added Loans

Servicer	Account Number	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
First Mark Services	002329692-15	\$763.00	\$1,000.00	4.000%	05/25/2007	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	11-1884521998	\$6,304.00	\$2,000.00	3.000%	01/22/2019	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	10-1884521998	\$3,837.00	\$1,000.00	3.000%	09/04/2018	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	9-1884521998	\$13,808.00	\$13,000.00	3.000%	06/09/2017	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	8-1884521998	\$4,455.00	\$4,000.00	3.000%	08/09/2016	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	7-1884521998	\$3,205.00	\$2,000.00	3.000%	05/03/2016	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	6-1884521998	\$17,295.00	\$2,000.00	3.000%	08/11/2015	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	4-1884521998	\$48,370.76	\$30,000.00	3.000%	06/05/2015	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	5-1884521998	\$33,724.24	\$30,000.00	3.000%	06/05/2015	Eligible	hrsa_zeshawn_uddin

Total Eligible Manual Loans Amount	\$131,762.00
Total Verified Manual Loans Amount	\$85,000.00

All Loans Totals

Total Pre-verified Loan Amount	\$131,762.00
Total Verified Loan Amount	\$85,000.00
Award Amount	\$75,000.00

Business Rules:

- The electronic loan table will include the following information:
 - Servicer Lender name
 - Loan Type
 - Current Balance
 - Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
- The following are possible electronic loan statuses:
 - Qualified
 - Eligible
 - Ineligible
- Electronic loan statuses will default to “Qualified” or “Ineligible” based on loan status.
- The electronic loan statuses with an asterisk (*) are identified as having been defaulted in the past.

- Electronic loans are by default verified by “system”.
- The Verified by column will only be updated with an analysts name once the loan has been manually verified on the Loan Details page.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans with an “As of Date” greater than 30 days from the applications submission date.
- An alert will be present at the top of the Loan Summary page when the application’s Total Pre-verified Loan Amount is below the maximum award amount for their contract type.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans that had previously been in default.
- The manual loan table will include the following information:
 - Servicer Lender name
 - Account Number
 - Current Balance
 - Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
 - Incomplete
- Manual loan statuses will default to “Not Reviewed.”
- The following are possible manual loan statuses:
 - Not Reviewed
 - Eligible
 - Ineligible
- The Current Balance column will list the current loan balance retrieved electronically or manually entered by the applicant on the application.
- The Verified Balance column will be blank until the loan has been manually verified by an analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Amount will display “\$0.00” for manually entered loans
- The Verified Interest Rate column will be blank until the loan has been manually verified by analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Interest Rate will display “0.000%” for manually entered loans
- The Total Pre-verified Loan Amount will display the sum of the Total Qualified DoED Loan Amount and the Total Eligible Manual Loans Amount submitted on the application.
- The Total Verified Loan Amount will reflect the total sum of verified DoED and manual loan amounts and will be updated as the analyst reviews each loan.
- The Award Amount will reflect the total award calculated based on the verified loans and application type upon submitting the loan page.
 - The Award Amount will vary depending on the application type
- Analysts will be required to verify the completion of each document for each manual loan submitted.

- Please note that the completion of the documents will not determine the overall completeness of loan information.
- The documents uploaded for each loan will be linked on the loan details page.
- If an analyst adds a new loan, the documents displayed on the loan details page will need to be verified for completion.
- If an analyst uploads a loan document from the Application Profile, the document will be displayed on the loan details page.
 - Completion for this document will not be required
- All loan information electronically retrieved or manually entered by the applicant will be displayed in read-only text.
- For all federal PLUS loans an additional question and corresponding answer will be present on the loans details page.
- If the analyst indicates an electronic loan requires manual verification, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For manually entered loans, if an analyst indicates “Yes” to all loan information being complete, the analyst will be required to verify if the loan is eligible.
- For manually entered loans, if the analyst indicates “Yes” to the loan being eligible for repayment, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For both electronic and manual loans the Verification date cannot be in the future.
- If the analyst verifies that the manually entered loan information is not complete, the loan will be deemed incomplete.
- If the analyst verifies that the manually entered loan information is not eligible, the loan will be deemed ineligible.
- Electronic loans can only be deemed eligible using the check boxes on the Loan Summary page.
- Comments are required if a manually entered loan is deemed ineligible or incomplete.
- The applicant will be deemed ineligible or incomplete and the task will be terminated upon submission if there are no eligible or complete loans.
- Analysts have the option to save for later by selecting Save on the Loan Summary Page and Loan Details Page. Selecting Save will not update the status of the section or loan to be completed. Analysts must select Save & Continue to deem the section or loan complete.

Section 10e: Review & Submit

When an analyst has completed review for an application, he/she will need to submit the task from the Review & Submit screen.

Review & Submit

Document Review Application Information Employment Loans Review & Submit Supporting Documents

▼ Document Review - Eligible

General Supporting Documents

Document Type	Document Name	Status
Eligible Health Professional Degree	webster degree_0001.pdf	Complete Eligible
Proof of U.S. Citizenship or U.S. National	birth certificate_0001.pdf	Complete Eligible
Verification of Disadvantaged Background/Exceptional Financial Need	verification background.pdf	
Substance Use Disorder Licensure or Certification	sc asoc alcohol licencs cac_0001.pdf	Complete Eligible
Credit Report	AA_Test_Document.pdf	Complete Eligible

Deemed Eligible by hrsa_zeshawn_uddin on 02/27/2019 04:24:36 PM EST.

[View Comments](#)

▶ Application Information Verification - Eligible

▶ Employment Verification - Eligible

▶ Loan Verifications - Eligible

Overall Application Status

Overall Status: Eligible

Application status upon submission: Eligible For COI

Comments

New Comments

Steps:

1. Analyst reviews the information he/she has verified.
2. Analyst enters comments.
3. Analyst selects Submit.

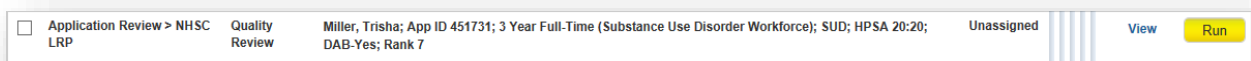
Business Rules:

- The most recent status of each section will be displayed next to the section name.
- Each section is expandable/collapsible.
- Analyst can click on any document in the Document Review section and the document will open in a new window.

- The most recent status the analyst gave for each document will be displayed in the Document Review table.
- Analyst can click on the Completed Date in the Employment Verification table to view the Employment Verification.
- Analyst can click on any of the loans to view the verified loan detail information.
- The most recent status of the section, most recent analyst who reviewed the section, and most recent date and time that the section was reviewed will be displayed in each section.
- Analysts can select View Comments to see all comments entered for each section.
- The overall status of the application will be displayed at the bottom of the page.
- The application status upon submission of the task will be displayed at the bottom of the page.
- Comments are required to submit the task.
- The task will be deemed ineligible or incomplete and will be terminated from the task list upon submission if at least one of the following is true:
 - Any document is deemed ineligible or incomplete
 - Credit report is not recommended
 - NPDB report was deemed ineligible
 - License state/site state mismatch is deemed ineligible
 - All loans are ineligible or incomplete
- If the applicant is eligible upon submission of the task, the task will become Eligible for COI and will be removed from the task list.
- If the applicant is deemed ineligible or incomplete, the applicant will become available on the Recommence tab of Review Planning.

Section 11: Step 3.B – Quality Review

After a task is submitted from Verification Review and has a reason to be sent to Exception Review, the task will become available in the task dashboard for the third step of review: Quality Review.



Steps:

1. Analyst navigates to the task dashboard by clicking on the Task Dashboard button from any BMISS page.
2. Analyst will see the tasks associated with his/her role.
3. Analyst will select Run to pick up a task and start review for the task.

Business Rules:

- The Process Name will show: Application Review > NHSC LRP.
- The Task Name will show the step of review:

- Quality Review
- The Task Description will show the following information for Base and NP:
 - Applicant Name (Last Name, First Name)
 - Application ID
 - Application Type
 - Discipline
 - HPSA (locked HPSA Score : highest HPSA score)
 - DAB (Yes/No)
- The Owner will show Unassigned until it is run by an analyst.
- Analyst can select View to see a read-only version of the verifications made for the application.
- Using the View functionality is role-based.

Section 11a: Document Review Verifications

Once an analyst picks up a task at Quality Review (Step 3.B of review), they will be directed to the first section of review: Document Review.

Document Review

[Document Review](#)
[Application Information](#)
[Employment](#)
[Loans](#)
[Review & Submit](#)
Supporting Documents

General Supporting Documents

Eligible Health Professional Degree

Document	Submitted Date	Entered By
webster degree_0001.pdf	02/12/2019	Applicant

What is the status of the Eligible Health Professional Degree?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Proof of U.S. Citizenship or U.S. National

Document	Submitted Date	Entered By
birth certificate_0001.pdf	02/12/2019	Applicant

What is the status of the Proof of U.S. Citizenship or U.S. National?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Verification of Disadvantaged Background/Exceptional Financial Need

Document	Submitted Date	Entered By
verification background.pdf	02/11/2019	Applicant

What is the status of the Verification of Disadvantaged Background/Exceptional Financial Need?

Did Not Check
 Complete Eligible
 Complete Ineligible
 Incomplete

Substance Use Disorder Licensure or Certification

Document	Submitted Date	Entered By
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Steps:

1. Analyst reviews the eligibility and completeness of each document
 - a. The verifications made by the Verification Review Analyst for each document will be displayed. The Exception Review Analyst can make any updates to the status of the documents
2. Analyst enters comments
3. Analyst selects Save & Continue

Business Rules:

- All document statuses will default to the verifications made by the Verification Review analyst.
- The System will always display the Proof of US Citizenship or US National document table.
- The Verification of Existing Service document table will only appear if the applicant responded that he/she has an existing service and uploaded the existing service document.
 - The applicant's response to being a member of the reserves from the Online Application will be displayed in read-only text under the Verification of Existing Service documentation section (if applicable).
- The Proof of Payment History table will only appear if an applicant was a previous NHSC LRP applicant.
 - If an applicant did not upload the option Proof of Payment History document on the online application, the analyst will be required to upload this document on the Document Review screen.
- The Disadvantaged Background/Exceptional Financial Need document will be present only if the applicant has selected yes to this question on the application and uploaded a document.
- Verification of an applicant's disadvantaged background will not affect an applicant's eligibility. Changes made by the analyst to the applicant's disadvantaged background status will be reflected on the banner.
- Substance Use Disorder (SUD) specific documents include the following:
 - Eligible Health Professional Degree (Required to be uploaded by all SUD applicants and may affect an applicant's eligibility)
- Substance Use Disorder Licensure or Certification (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Data 2000 Waiver (Optional document: Only displayed for SUD applicants if uploaded by applicant, does not affect applicants eligibility)
- Analysts can continue with the other sections of review without completing the Document Review section, but will not be able to submit the task until the Document Review section is complete.
- Comments are required if a document is made ineligible or incomplete.
- Comments are required if the analyst indicates that he/she does not recommend the applicant for award based on the credit report.
- All documents will open in a new window.
- The Entered By and Submitted Date will be displayed for each document.
 - Entered By will show who (applicant or analyst) uploaded the document.
 - Submitted Date will show the date the document was uploaded

- Analysts have the option to save for later by selecting Save.
- Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Section 11b: Application Information Review

After reviewing the Documents, Quality Review analysts will review any questions which were added to the application on the Application Information page. The Application Information review page will only appear during review for application types which displayed questions on the application. If no questions were asked, this page will not display during review.

Application Information Review

➤ Document Review
➤ Application Information
➤ Employment
➤ Loans
➤ Review & Submit

Supporting Documents

Application Information

1. Do you provide substance use disorder services (e.g. Buprenorphine treatment or substance use disorder counseling) at your site? Yes, Substance Abuse Counseling

2. Are you licensed or certified in your state to provide substance use disorder services? If yes, please upload your credentials in the Supporting Documents section. Yes

3. Do you possess a DATA 2000 waiver? If yes, please upload your waiver in the Supporting Documents section. No

4. Will you have substance use disorder training or certification completed by July 18, 2019? Yes

5. I am applying to work at a NHSC-approved site because of the: (Check all that apply)

Loan repayment incentive
Substance Use Disorder treatment incentive
Opportunity to work with an underserved population
Interest in working in an underserved area
Opportunity to serve in a rural area
Location relative to my home community

Based on the answers above, and the documents reviewed, does this applicant meet their current tier requirement? * Yes No

Based on the answers above, do you recommend continuing review for this applicant? * Yes No

Comments

New Comments

Steps:

1. Analyst reviews the answers displayed on the Application Information review page.

2. Analysts confirm the Yes or No answer provided during Verification Review. Analyst will have the ability to change the previous response.
3. Analyst leaves a comment if necessary.

Business Rules:

- The Application Information review page will only appear during review for application types which displayed questions on the application. (If no questions were asked, this page will not display during review)
- Answers to questions will be in read-only format. Applicant will be unable to make changes to applicant responses.
- For Substance Use Disorder (SUD) applicants analysts will be required to indicate whether an applicant meets their current tier requirement.
 - A selection of Yes indicated that the analyst reviewed the responses to the questions and documents from the previous page to determine eligibility to predefined tiering requirements.
 - A selection of No will change Tier 1 and Tier 2 applicants to Tier 3.
 - Tier 3 applicants who do not meet their requirements will see no change to the tier.
- Analyst will confirm whether the application should continue through review.
- If the analyst selects 'No' to the review question, the application will be marked to go to 'COI'.
- Review question does not affect application eligibility.
- Application can be discontinued should Quality review analyst deem necessary.

Section 11c: Employment Verifications

After reviewing the Documents, Quality Review analysts will review the employment verifications.

The screenshot shows a web application interface for 'Employment Verifications'. At the top, there is a navigation bar with the following steps: Document Review, Application Information, Employment, Loans, Review & Submit, and Supporting Documents. The main content area is titled 'Employment Verifications' and contains a table with the following data:

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

Below the table, there is a section for 'National Practitioner Data Bank' with the question 'Was an adverse incident reported by the site?' and a dropdown menu showing 'Tandem Health - 1278 Lafayette : No'. There is also a 'License' section with a table for 'Document', 'Submitted Date', and 'Entered By'. Below this is a text input field with a 'Browse...' button and an 'Upload' button. The 'Comments' section has a 'New Comments' text input field and an 'Existing Comments' section stating 'There are no existing comments.' At the bottom, there are 'Save & Continue' and 'Save' buttons.

Steps:

1. Analyst reviews the Employment Verification Form by clicking on the Completed Date in the Employment Verification table (see screenshot on next page).
2. Analyst verifies whether the applicant is eligible based on the NPDB report.
 - a. This verification will only be displayed if the Verification Review analyst or the Site POC(s) indicated that the NPDB report listed an adverse incident.
3. Analyst verifies if the applicant is authorized to practice in the state of his/her place of employment in pursuant to the licensure requirements.
 - a. This verification will only be displayed if the applicant's license state does not match the site of employment state.
4. Analyst enters comments.
5. Analyst selects Save & Continue.

Business Rules:

- The NPDB eligibility verification will only be displayed and required if the Verification Review analyst or the Site POC indicated that an adverse incident was reported. If the Verification Review analyst or Site POC indicated that no adverse incident was reported, this verification will not be displayed.
- The response of the Verification Review analyst or the Site POC in regards to the adverse incident will be displayed as read-only text.
- The NPDB report uploaded by either the Document Review and Eligibility analyst or the Site POC(s) will be displayed and linked (if available).
- The person or site POC that uploaded the NPDB report will be displayed (if applicable).
- If the Site POC ran the NPDB report within 18 months of the application deadline and indicated that no adverse incident was reported on the Employment Verification Form, there will be no NPDB report uploaded and no additional verifications regarding the NPDB.
- The Exception Review analyst will see the response to the License state/Site state eligibility verification from the Verification Review analyst, if it was required.
- Comments are required if the analyst provides the following verifications:
 - NPDB = Ineligible
 - License state/site state mismatch eligibility = Ineligible
 - Comments will only be required for the License state/Site state mismatch verification if the Exception Review analyst changes this verification from Eligible to Ineligible.
- The HPSA score in the Employment Verification table will display the current HPSA site score in BMISS.
 - This score can change if the highest HPSA score for the applicant's discipline changes internally.
 - For Substance Use Disorder (SUD) applicants HPSA score is based on the policy that the highest (Primary Care or Mental Health) for a given site shall appear.
- The analyst can view the Employment Verification Form by clicking on the Completed Date from the Employment Verification table.
- The Employment Verification Form will display read-only text and show all of the Site POC responses.
- The analyst can identify if an applicant is serving as a PPO if one or a combination of the following verification responses are as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = No
 - Is the applicant/participant a contractor? = Yes
 - Does the applicant/participant own or have a financial interest in the site identified above? = Yes
 - Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = No
- The analyst can identify if an applicant is serving as a non-PPO if all of the following verification responses are as listed below:
 - Is the applicant/participant an employee of the site identified above and subject to the personnel system and employment policies of that site? = Yes

- Is the applicant/participant a contractor? = No
- Does the applicant/participant own or have a financial interest in the site identified above? = No
- Does the above identified site provide the applicant/participant with malpractice insurance, which includes tail coverage (either commercially or through the Federal Tort Claims Act)? = Yes
- Analyst can click on the site name in the Employment Verification Form to be directed to the Site Profile in BMISS.
- Analysts have the option to save for later by selecting Save.
 - Selecting Save will not update the status of the section to be completed. Analysts must select Save & Continue to deem the section completed.

Section 11d: Loan Verifications

After reviewing the employment verifications, the Quality Review analyst will review the loan verifications.

Electronic Loan Steps:

1. Analyst review loans verified by the Under Verification analyst.
2. Analyst selects a loan from the Electronic loan table by clicking on the Servicer Lender name.
3. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
4. Analyst determines if manual verification is needed or returns to the Loan Summary page.
5. If manual verification is required, analyst answers “Yes” to “Does this loan require a manual review?”
6. Analyst verifies the loan information.
7. Analyst enters comment.
8. Analyst selects Submit.
9. System re-directs analyst to the Loan Summary page.
10. If no manual verification is required or if manual verification is complete the analyst will then deem loan “Eligible” for award by checking the box next to each “Qualified” loan on the Loan Summary page.
11. Analyst repeats steps 1-10 for each electronic loan submitted.
12. Analyst enters comments.
13. Analyst selects Save & Continue.

Loan Verifications

⚠ One or more of the Electronic loan's Current Balance As of Date is greater than 30 days from application submission date.

➤ Document Review

➤ Application Information

➤ Employment

➤ Loans

➤ Review & Submit

Supporting Documents

Add Loan

Electronically Retrieved Loans from U.S. Department of Education

<input type="checkbox"/>	Servicer	Loan Type	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$4,497.00	\$4,497.00	5.840%	05/18/2016	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$12,054.00	\$12,054.00	5.840%	07/07/2015	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$8,584.00	\$8,584.00	6.210%	01/30/2015	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$21,659.00	\$21,659.00	5.410%	05/29/2014	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT STAFFORD UNSUBSIDIZED	\$5,864.00	\$5,864.00	6.800%	11/13/2012	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT CONSOLIDATED SUBSIDIZED	\$3,343.00	\$3,343.00	1.510%	07/13/2012	Eligible	system
<input checked="" type="checkbox"/>	DEPT OF ED/NAVIENT	DIRECT CONSOLIDATED SUBSIDIZED	\$6,986.00	\$6,986.00	1.510%	07/13/2012	Eligible	system

Manual Loan Steps:

1. Analyst review loans verified by the Under Verification analyst.
2. Analyst selects a loan from the Loan table by clicking on the Servicer Lender name.
3. System directs analyst to the loan details page for the loan selected (see screenshot on next page).
4. Analyst verifies the loan information.
5. Analyst enters comments.
6. Analyst selects Submit.
7. System re-directs analyst to the Loan Summary page.
8. Analyst repeats steps 1-7 for each loan submitted.
9. Analyst will have the option to add a new loan if necessary
10. Analyst enters comments
11. Analyst selects Save & Continue

Loan Verifications

Document Review Application Information Employment Loans Review & Submit

Supporting Documents

There are no electronic loans available.

Add Loan

Total Qualified DoED Loan Amount	\$0.00
Total Verified DoED Loan Amount	\$0.00

Manually Added Loans

Servicer	Account Number	Current Balance	Verified Amount	Verified Interest Rate	Original Loan Date	Status	Verified By
First Mark Services	002329692-15	\$763.00	\$1,000.00	4.000%	05/25/2007	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	11-1884521998	\$6,304.00	\$2,000.00	3.000%	01/22/2019	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	10-1884521998	\$3,837.00	\$1,000.00	3.000%	09/04/2018	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	9-1884521998	\$13,808.00	\$13,000.00	3.000%	06/09/2017	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	8-1884521998	\$4,455.00	\$4,000.00	3.000%	08/09/2016	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	7-1884521998	\$3,205.00	\$2,000.00	3.000%	05/03/2016	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	6-1884521998	\$17,295.00	\$2,000.00	3.000%	08/11/2015	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	4-1884521998	\$48,370.76	\$30,000.00	3.000%	06/05/2015	Eligible	hrsa_zeshawn_uddin
FedLoan Servicing	5-1884521998	\$33,724.24	\$30,000.00	3.000%	06/05/2015	Eligible	hrsa_zeshawn_uddin

Total Eligible Manual Loans Amount	\$131,762.00
Total Verified Manual Loans Amount	\$85,000.00

All Loans Totals	
Total Pre-verified Loan Amount	\$131,762.00
Total Verified Loan Amount	\$85,000.00
Award Amount	\$75,000.00

Business Rules:

- The electronic loan table will include the following information:
 - Servicer Lender name
 - Loan Type
 - Current Balance
 - Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
 - Ineligible
- The following are possible electronic loan statuses:
 - Qualified
 - Eligible
- Electronic loan statuses will default to “Qualified” or “Ineligible” based on loan status.
- The electronic loan statuses with an asterisk (*) are identified as having been defaulted in the past.

- Electronic loans are by default verified by “system”.
- The Verified by column will only be updated with an analysts name once the loan has been manually verified on the Loan Details page.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans with an “As of Date” greater than 30 days from the applications submission date.
- An alert will be present at the top of the Loan Summary page when the application’s Total Pre-verified Loan Amount is below the maximum award amount for their contract type.
- An alert will be present at the top of the Loan Summary page when an application has one or more electronic loans that had previously been in default.
- The manual loan table will include the following information:
 - Servicer Lender name
 - Account Number
 - Current Balance
 - Verified Amount
 - Verified Interest Rate
 - Original Loan Date
 - Status
 - Verified By
- The following are possible manual loan statuses:
 - Not Reviewed
 - Eligible
 - Ineligible
 - Incomplete
- Manual loan statuses will default to “Not Reviewed.”
- The Current Balance column will list the current loan balance retrieved electronically or manually entered by the applicant on the application.
- The Verified Amount column will be blank until the loan has been manually verified by an analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Amount will display “\$0.00” for manually entered loans
- The Verified Interest Rate column will be blank until the loan has been manually verified by analyst or when an electronic loan is selected to be “Eligible”.
 - If the Status is ineligible or incomplete the Verified Interest Rate will display “0.000%” for manually entered loans
- The Total Pre-verified Loan Amount will display the sum of the Total Qualified DoED Loan Amount and the Total Eligible Manual Loans Amount submitted on the application.
- The Total Verified Loan Amount will reflect the total sum of verified DoED and manual loan amounts and will be updated as the analyst reviews each loan.
- The Award Amount will reflect the total award calculated based on the verified loans and application type upon submitting the loan page.
 - The Award Amount will vary depending on the application type
- Analysts will be required to verify the completion of each document for each manual loan submitted.

- Please note that the completion of the documents will not determine the overall completeness of loan information.
- The documents uploaded for each loan will be linked on the loan details page.
- If an analyst adds a new loan, the documents displayed on the loan details page will need to be verified for completion.
- If an analyst uploads a loan document from the Application Profile, the document will be displayed on the loan details page.
 - Completion for this document will not be required.
- All loan information electronically retrieved or manually entered by the applicant will be displayed in read-only text.
- For all federal PLUS loans an additional question and corresponding answer will be present on the loans details page.
- If the analyst indicates an electronic loan requires manual verification, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For manually entered loans, if an analyst indicates “Yes” to all loan information being complete, the analyst will be required to verify if the loan is eligible.
- For manually entered loans, if the analyst indicates “Yes” to the loan being eligible for repayment, the analyst will be required to enter the following information:
 - Verified Current Balance
 - Verified Interest Rate
 - Verified By
 - Verification Date
- For both electronic and manual loans the Verification date cannot be in the future.
- If the analyst verifies that the manually entered loan information is not complete, the loan will be deemed incomplete.
- If the analyst verifies that the manually entered loan information is not eligible, the loan will be deemed ineligible.
- Electronic loans can only be deemed eligible using the check boxes on the Loan Summary page.
- Comments are required if a manually entered loan is deemed ineligible or incomplete.
- The applicant will be deemed ineligible or incomplete and the task will be terminated upon submission if there are no eligible or complete loans.
- Analysts have the option to save for later by selecting Save on the Loan Summary Page and Loan Details Page.
 - Selecting Save will not update the status of the section or loan to be completed. Analysts must select Save & Continue to deem the section or loan complete.

Section 11e: Review & Submit

When an analyst has completed review for an application, he/she will need to submit the task from the Review & Submit screen.

Review & Submit

Document Review Application Information Employment Loans Review & Submit Supporting Documents

Document Review - Eligible

Application Information Verification - Eligible

Employment Verification - Eligible

Loan Verifications - Eligible

Overall Application Status

Overall Status: Eligible

Application status upon submission: Eligible For COI

Comments

New Comments

Existing Comments

Thursday, February 28, 2019 hrs-a-zeshawn_uddin at 09:31:08 AM entered a Review and Submit Eligibility Page Comment:

Steps:

1. Analyst reviews the information they have verified.
2. Analyst enters comments.
3. Analyst selects Submit.

Business Rules:

- The most recent status of each section will be displayed next to the section name.
- Each section is expandable/collapsible.
- Analyst can click on any document in the Document Review section, and the document will open in a new window.
- The most recent status the analyst indicated for each document will be displayed in the Document Review table.
- Analyst can click on the Completed Date in the Employment Verification table to view the Employment Verification.
- Analyst can click on any of the loans to view the verified loan detail information.

- The most recent status of the section, most recent analyst who reviewed the section, and most recent date and time that the section was reviewed will be displayed within each section.
- Analysts can select View Comments to see all comments entered for each section.
- The overall status of the application will be displayed at the bottom of the page
- The application status upon submitting the task will be displayed at the bottom of the page.
- Comments are required to submit the task.
- The task will be deemed ineligible or incomplete and will be terminated from the task list upon submission if at least one of the following is true:
 - Any document is deemed ineligible or incomplete
 - Credit report is not recommended
 - NPDB report was deemed ineligible
 - License state/site state mismatch is deemed ineligible
 - All loans are ineligible or incomplete
- If the applicant is eligible upon submission of the task, the task will become Eligible for COI and will be removed from the task list
- If the applicant is deemed ineligible or incomplete, the applicant will become available on the Recommence tab of Review Planning

Section 12: Ineligible/Incomplete Pop-Up

If a verifier deems an application ineligible or incomplete, the analyst will receive an Ineligible/Incomplete pop-up window upon continuing from the page where he/she made the applicant ineligible or incomplete. The pop-up window will also list the reason(s) for ineligibility or incompleteness. Analysts will have the option to continue with the remaining verifications, or skip to the Review & Submit page to submit the task. Remaining verifications are not required if an applicant has been verified as ineligible or incomplete.

Application ID	450543	Tier	Tier 1	Submitted On	February 12, 2019
Program	NHSC LRP	HPSA	20 : 20	Status	Under Exception Review
Phone	(000) 000-0000	HPSA Type	Mental Health	Reason	Analyst Requested
Discipline	Sub: Prof:	<input type="checkbox"/> Applicant Ineligible / Incomplete			

This applicant has been made ineligible/incomplete because:

- One or more documents are in Incomplete or Ineligible status.

Employment Verif

Successfully saved

Document Review

Supporting Documents

Employment Verificati

Completed Date	Site Name	Site BHW ID	Status	HPSA Type	Highest HPSA Score
01/14/2019	Tandem Health - 1278 Lafayette	0423590	Complete	Mental Health	20

National Practitioner Data Bank

W... NHSC... LRP... M...