Entry Level Program
User Manual
for the
NEW
ARC-PA Program Management Portal

Accreditation Review Commission on Education for the Physician Assistant, Inc.

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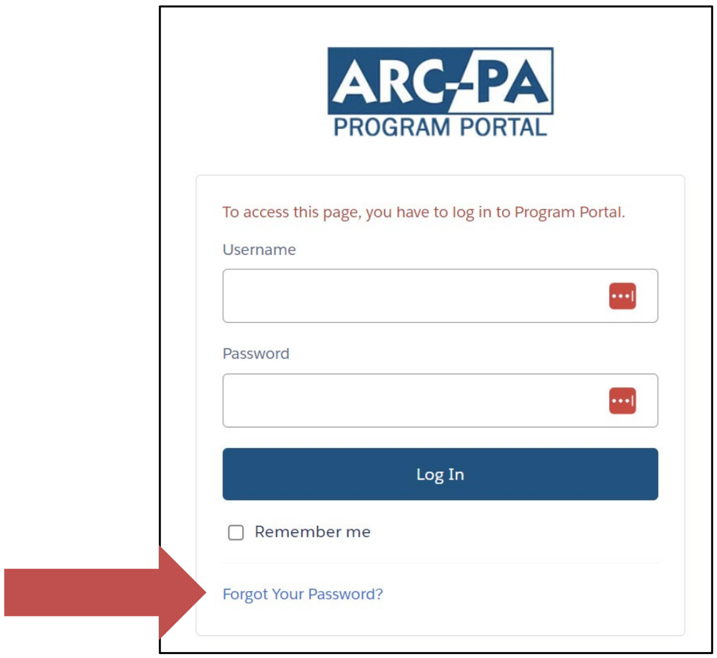
Chapter 1: Getting Started

Logging into the PA Program Management Portal

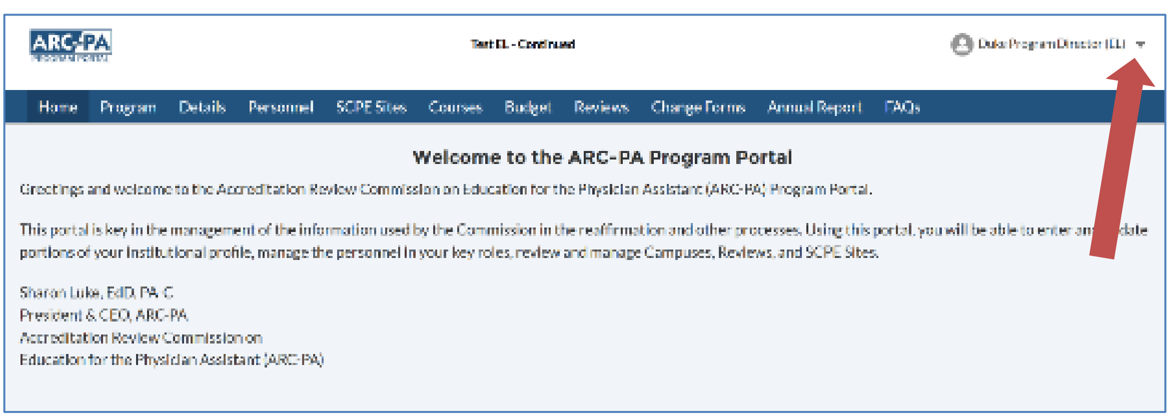
The login page is the first page you see when you open the ARC-PA Program Management Portal.

To log into the Portal, you must have already registered as a user of the Portal. You should have received an email from the Portal with a link to the registration page. On the registration page, you are required to enter a username (which is your email) and create a password.

1. Open the ARC-PA program management Portal. https://portal.arc-pa.org/ The **Login** page appears.
2. Enter your username (your email).
3. Enter your password. Use the “Forgot Your Password” if needed.

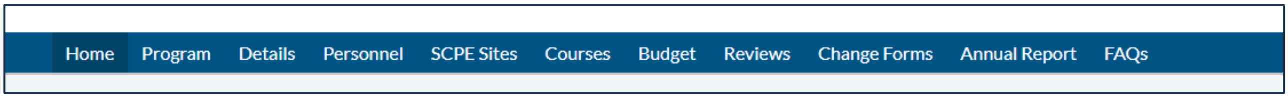


4. After you enter your username and password, click **Log In**. The system logs you into the Portal. You will see this landing page, which may include announcements and updates. Note that if you have access to multiple programs, the dropdown arrow next to your name in the top-right corner will allow you to toggle between programs.



Chapter 2: Navigating the ARC-PA Program Portal

Using the Dashboard Menu



This is the dashboard menu that appears at the top of every page in the Portal. The menu has a link to manage the various program details, information submissions, and reports.

Home is the welcome page.

Program includes contacts, an overview, sponsoring institutions, and some program details.

Details include tuition and fees, maximum class size, and information about each campus, including student enrollment, PANCE pass rates, facilities information, and student attrition.

Personnel include all individuals associated with the program.

SCPE Sites include all supervised clinical practice experience (SCPE) sites with affiliation agreements.

Courses include information about each course, including related syllabi.

Budget includes the sources of funding for the program and budgeted expenditures for the year.

Reviews is a new page where all program documents, upcoming site visit documents, and report submissions will be found and submitted.

Change Forms is where you can find and complete the change forms online (previously available for download on the website).

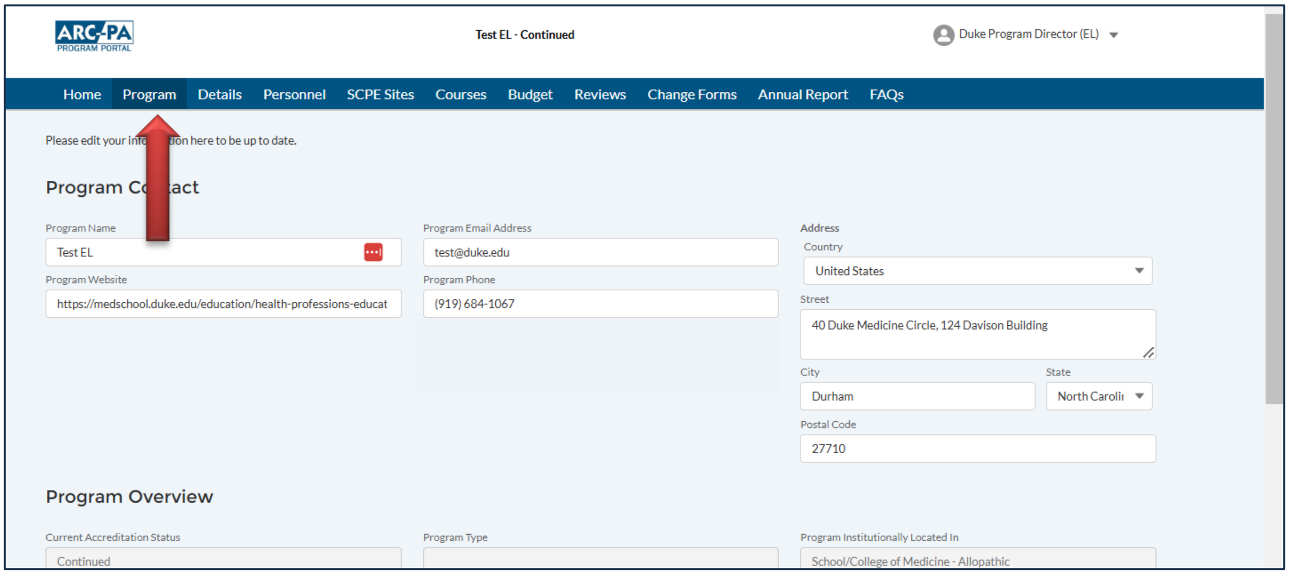
Annual Report includes details about that year’s curriculum and a submission checklist for the annual report.

FAQs include this user manual, tips for using the portal, and the contact email for the portal team if you need help (portalfeedback@arc-pa.org).

Entering Program Information

Program

- From the Dashboard menu, select the **Program** tab. The following appears:



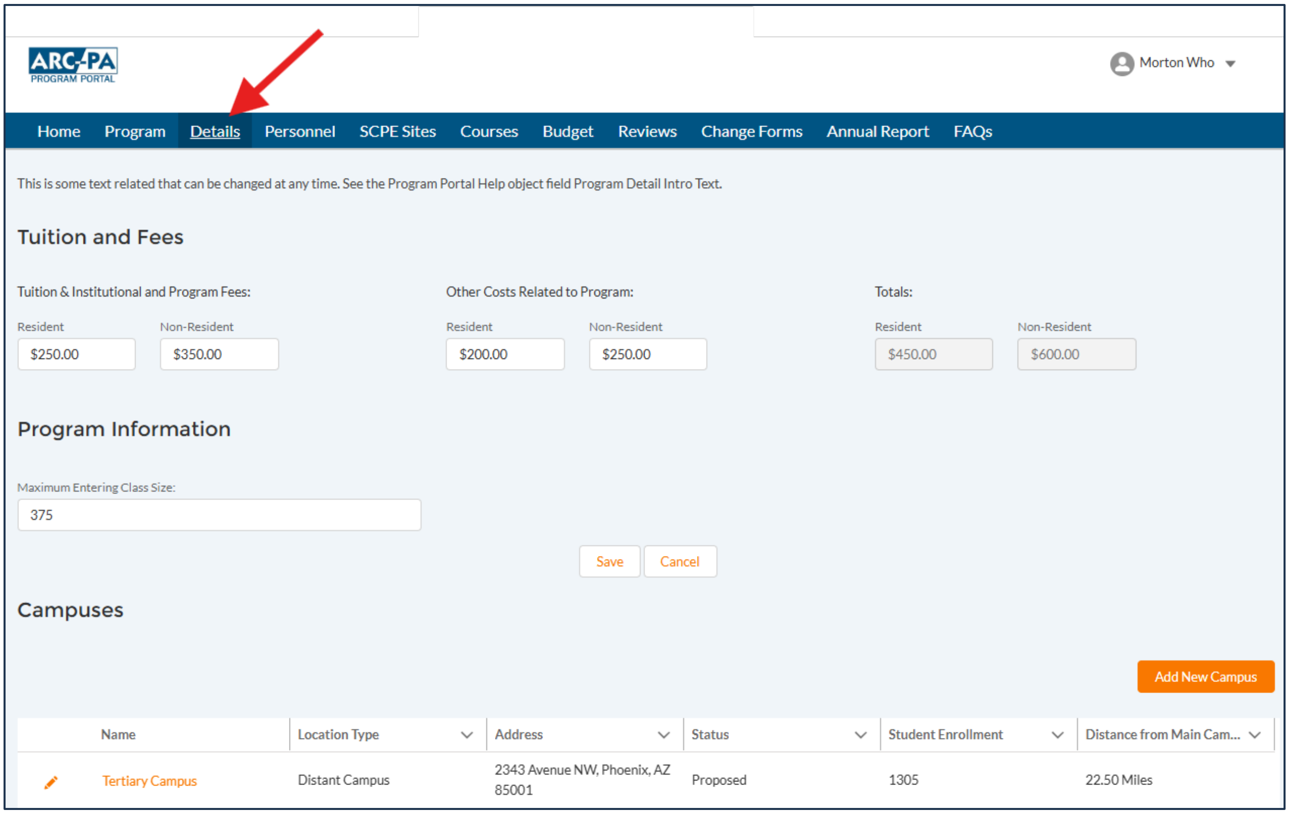
Enter or change the following information, as necessary, always clicking “Save” at the bottom of the page before moving to another page:

- **Program Name.** This is the **official full name of the program that goes on the accreditation certificate**. You may edit this by typing over the name. If the program’s name is officially changed, contact the ARC-PA (AccreditationServices@arc-pa.org) in addition to updating it on the Portal.
- **Program Website Address.** This is the **URL for the program website**. This URL should link directly to the **program's website,** not to the sponsoring institution's website.
- **Program Email Address.** This is the **email address** for the program.
- **Program Mailing Address.** This is the **mailing address** for the program.
- **Program Phone.** This is the **primary contact phone number** for the program. This number should be one that is answered personally by a contact familiar with the program and not only by an automated system.
- **Program Overview/Sponsoring Institution.** This information is greyed out and can only be edited by contacting Accreditation Services.
- **Regional Accreditor/Institutional Accreditor.** The accrediting body is greyed out and can only be changed by contacting Accreditation Services. Please keep the “year awarded” up to date with the most recent accreditation/re-accreditation date and the year of the next review.
- **Start of Fiscal Year**. Select the month that the fiscal year begins.
- **Month(s) Classes Begin.** The starting month(s) for the program’s accredited curriculum. If a program starts more than one class per calendar year, select multiple options.
- **Month of Graduation.** The month students in the current cohort are scheduled to complete the program.
- **Date Clinical Phase Starts.** The date the most recently matriculated cohort will begin supervised clinical practice experiences.
- **Do You Offer a Part-time Program Option?** Check the box if your program consistently offers a part-time enrollment, such as having a group of students complete the didactic curriculum over 2 years and another group complete it over 1 year.
- **Number of Classes/Cohorts Admitted per Calendar Year.** The number of cohorts of students that begin the program in a calendar year. For most programs, this will be 1.

- **Length of entire program** is the number of months between the first day of class and the last day of class for a student cohort. It should be the sum of the length of the pre-clinical phase (didactic courses before SCPEs) and the length of the clinical phase (SCPEs and clinical year courses). Do not subtract vacation time from this total (i.e., winter break, spring break, etc.).

Details

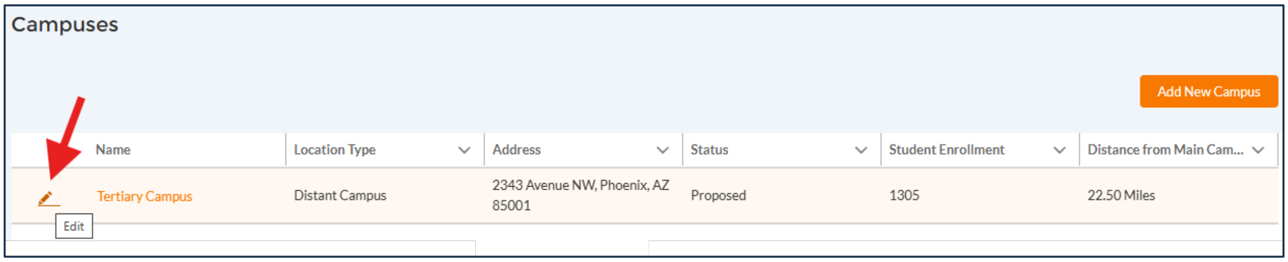
- Select the **Details** tab. The following appears:



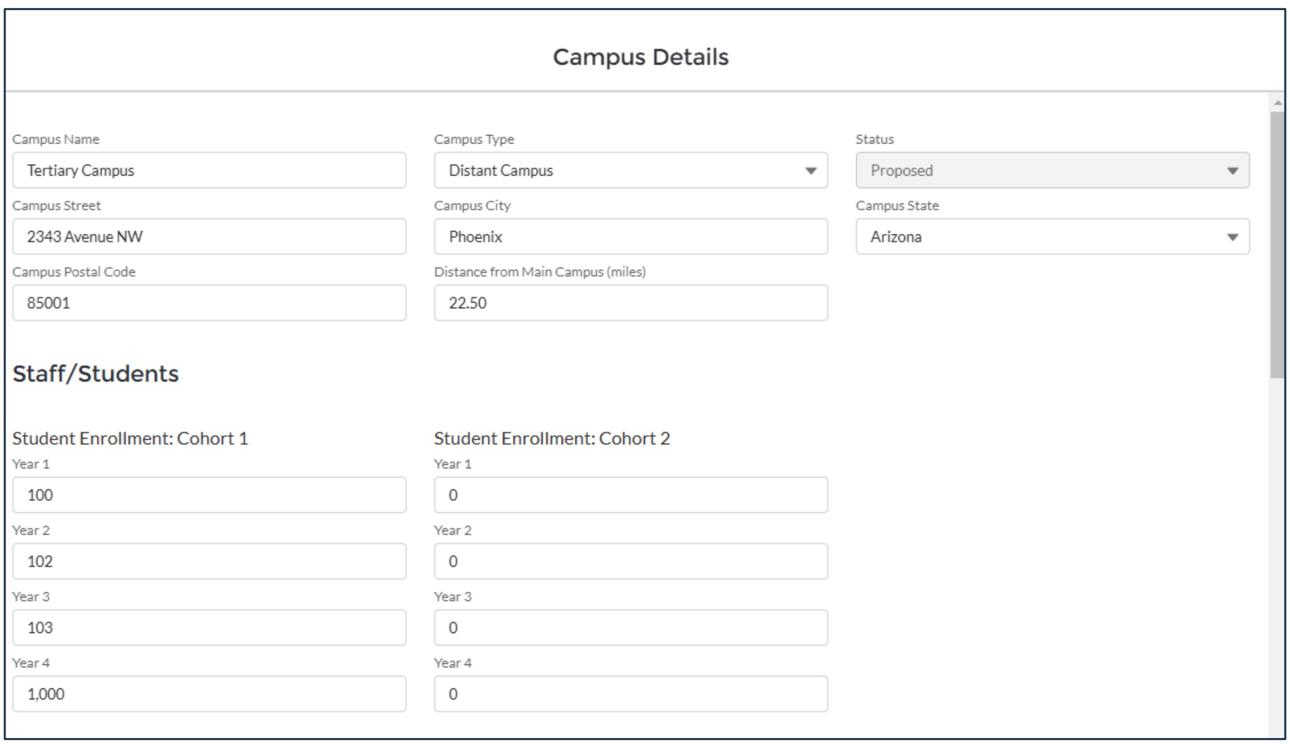
Tuition and Fees

- **Tuition & Institutional and Program Fees.** These are the costs paid by all students to the institution or program for the entire program. You can enter this for residents and non-residents. This should match what is listed on the program website.
- **Other Costs Related to the Program.** These are costs required of all students that are **not** paid to the institution or program for such things as medical equipment, subscriptions, memberships, and estimated additional travel and housing for SCPEs. Enter this for residents and non-residents. This should match what is listed on the program website. The tuition/fees and “other costs” should be equal to the total cost of enrollment that is utilized by financial aid.
- **Totals.** These are calculated for you after you click the **Save Tab** button.
- **Maximum Entering Class Size.** This is the maximum class size approved by the Commission. *Remember to submit an exceeding class size form (in the Change Forms tab) if, at any time, the cohort size exceeds its maximum (i.e., when a student decelerates into an already maximum-size cohort).

Campuses

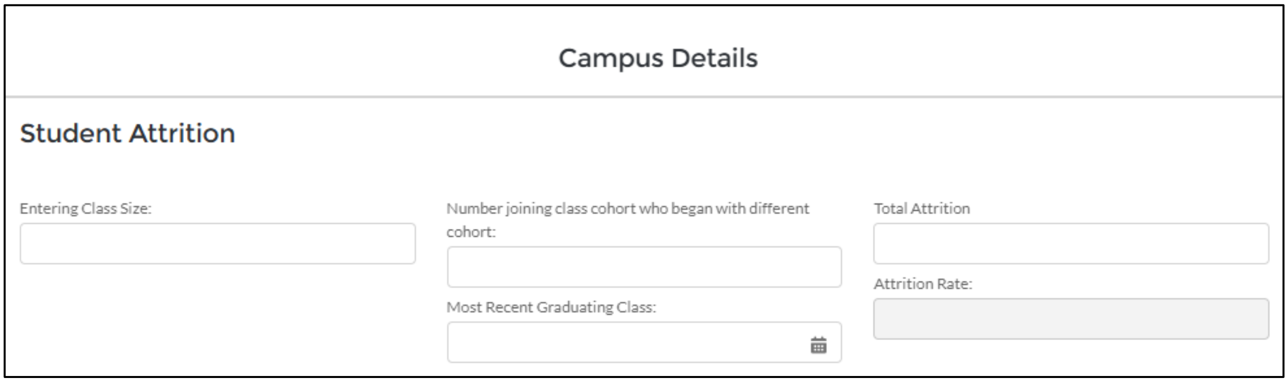


Campuses. Use this section to enter information about each campus. If your campus is already listed, you can edit it by clicking the pencil icon to the left of the campus name. If not, click “add new campus.” The “main campus” is where the PA program is located, regardless of whether that is the institution’s main location or a satellite campus. "Distant campuses” are added by the program once approved by the Commission. A Distant Campus is a geographically separate campus from the main program at which didactic instruction occurs.



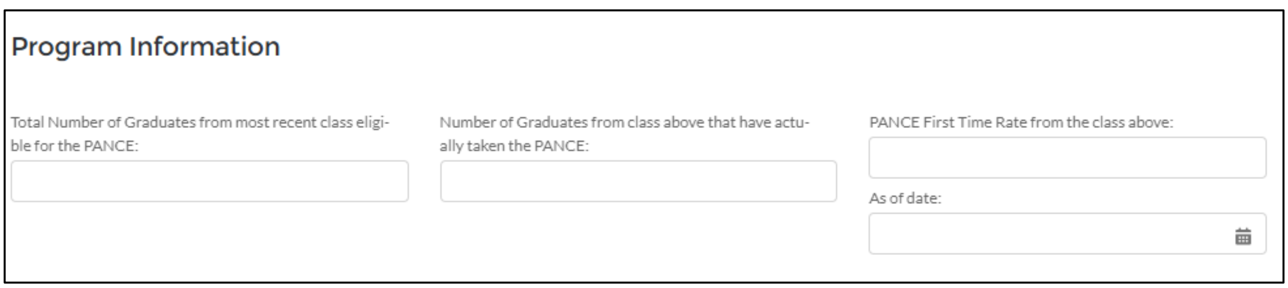
- For each campus, enter the basic information requested in the first block.
- **Students**. If you have just one cohort of students entering each year, you will only enter information in the “Student Enrollment: Cohort 1” column. Use the other column if you have a second cohort every year, such as in a program with a Fall start and a Spring start (there are only a few programs like this). Year 1 = number of students currently in the program's first year; Year 2 = number of students currently in the program's second year. These numbers will change annually during the month when new students begin (and may change periodically throughout the year due to withdrawals or decelerations) as Year 1 students progress to become Year 2 students and so on; Year 3 refers to the number of students in the third calendar year of the program. The total of years 1-4 should equal the current total program enrollment. Graduated students should not be accounted for on this student enrollment page. These numbers need to be kept up to date throughout the year.

Student Attrition. This is the attrition calculated for the most recently graduated class. Enter this information after a cohort graduates. The information in this section will be for whichever cohort graduated on the date entered in the Most Recent Graduating Class Field in this section.



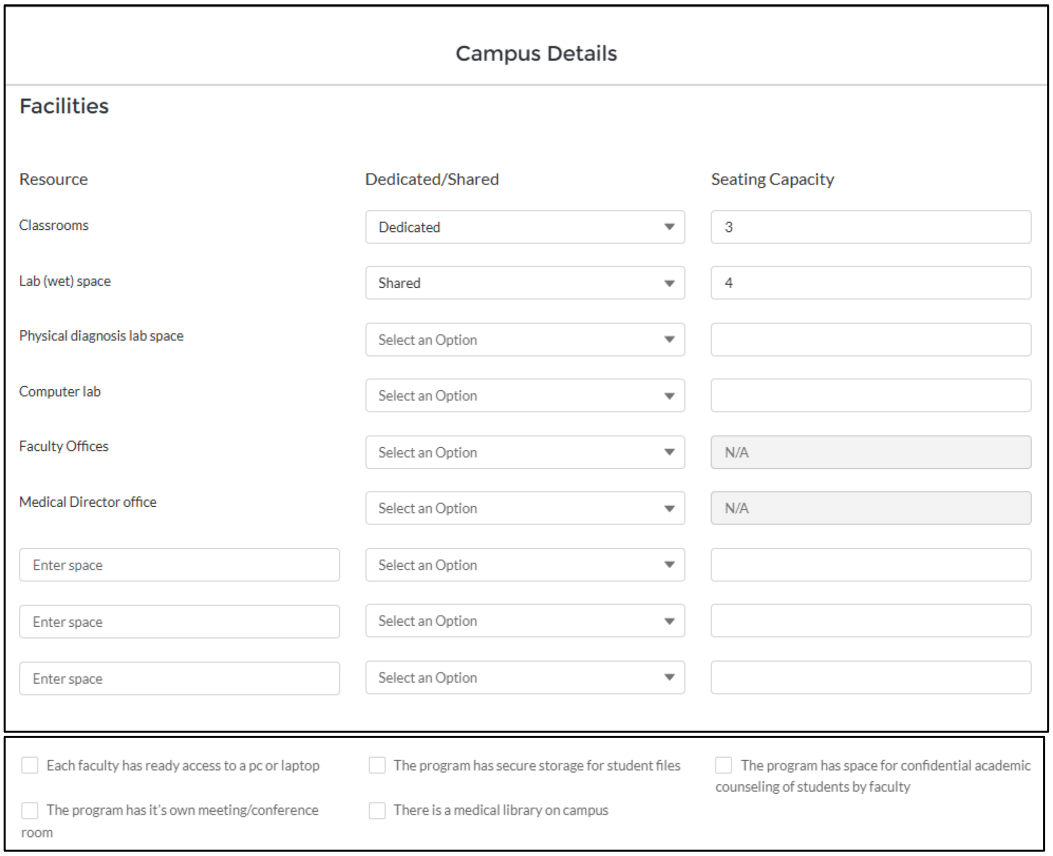
- **Entering Class Size**. This is the number of new students accepted into the program for the cohort referenced by the “Most Recent Graduating Class” date provided.
- **Number of students who joined the cohort** from a previous class (i.e., deceleration or leave of absence from a different cohort).
- **Total attrition** is the number of students who were once, at any time, part of this graduated class who did not graduate with the cohort (i.e., dismissal, withdrawal, deceleration, or leave of absence).
- **Most recent graduating class.** This is the date that the class described in this attrition section graduated.
- **Attrition rate percentage** will be calculated for you when the page is saved.

PANCE



- **Total Number of Graduates, from most recent class, eligible for the PANCE.** Type the number in the field. Unless your program has no graduates, this should never be zero. New programs will leave it blank until they have a graduating cohort. The most recent class should match the graduating class date entered in the attrition information immediately above (preceding) the PANCE data once all graduates have attempted the PANCE at least once.
- **As of date**. Enter the date that you are entering the most current information.
- **Number of Graduates from the class above who have taken the PANCE.** Type the number in the field.
- **PANCE First Time Pass Rate from the class above.** This is a percentage. Enter this as a whole number (0 to 100). When rounding to a whole number, use mathematical rounding rules (84.50 will round up; 84.49 will round down). The number should match the percentage provided by NCCPA. This field should be updated no later than April 1st each year.

Facilities information


Campus Details

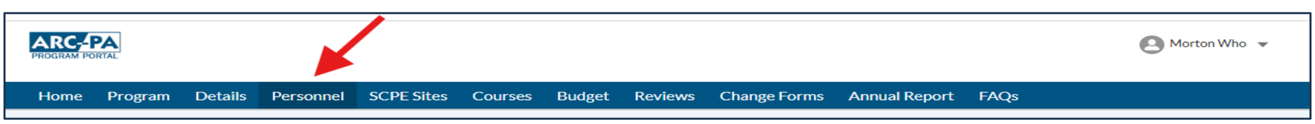
Facilities

Resource	Dedicated/Shared	Seating Capacity
Classrooms	Dedicated	3
Lab (wet) space	Shared	4
Physical diagnosis lab space	Select an Option	
Computer lab	Select an Option	
Faculty Offices	Select an Option	N/A
Medical Director office	Select an Option	N/A
Enter space	Select an Option	
Enter space	Select an Option	
Enter space	Select an Option	

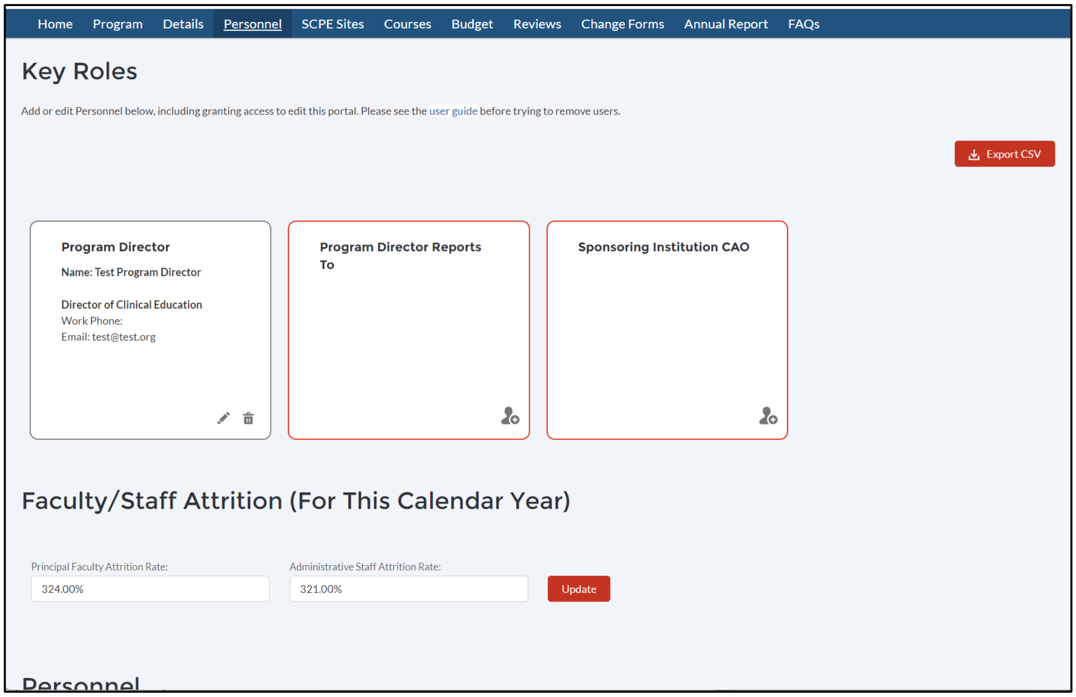
- [ ] Each faculty has ready access to a pc or laptop
- [ ] The program has secure storage for student files
- [ ] The program has space for confidential academic counseling of students by faculty
- [ ] The program has it's own meeting/conference room
- [ ] There is a medical library on campus

- Answer the questions related to the facilities available at each campus, indicating whether each is dedicated to only PA program use or shared between the PA program and other programs or schools. Add any additional facilities, such as simulation labs, where it says “enter space.” Seating capacity numbers include seats available in classrooms or lab space capacity for skills labs.
- Provide optional clarifying comments in the boxes provided as needed to explain the program’s facilities and to verify compliance with the standards.

Personnel



Select the Personnel tab. The following appears:

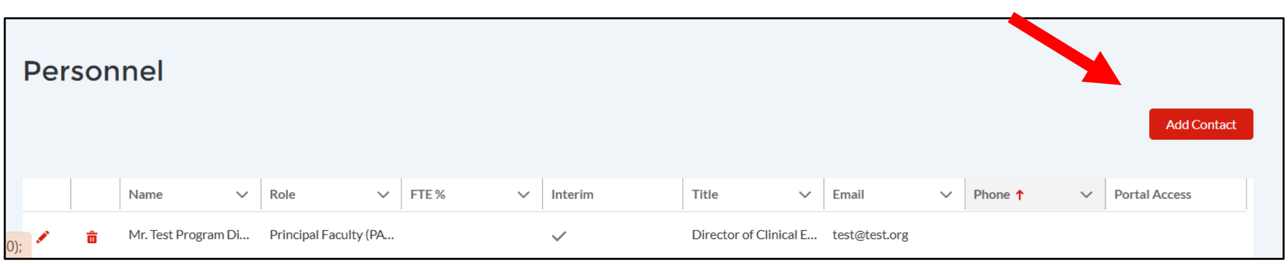


Key Roles

- You can enter (Person icon), edit (pencil icon), or delete (trashcan icon) each of the key roles
  - **Program Director**
  - **Program Director Reports To**
  - **Sponsoring Institution Chief Administrative Officer (CAO)**
- You can use the Export CSV button to download a list of all of the program personnel
- Please note that the black, green, and red box colors hold no significance and will not change even when all information is complete.

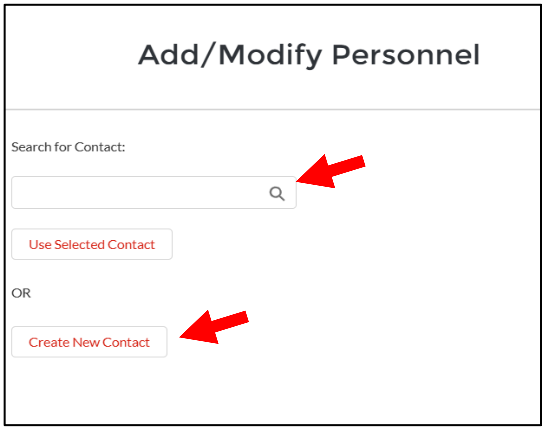
Personnel

- **Add Contact** in the red box on the right side of the page opens the window to add a new personnel listing. All other personnel can be managed from this listing of program personnel. You can edit (**pencil icon**) or delete (**trashcan icon**) personnel as needed. **When a person moves to a new role or resigns, use the instructions below regarding changing Key Roles, rather than the delete (trashcan icon) option.**



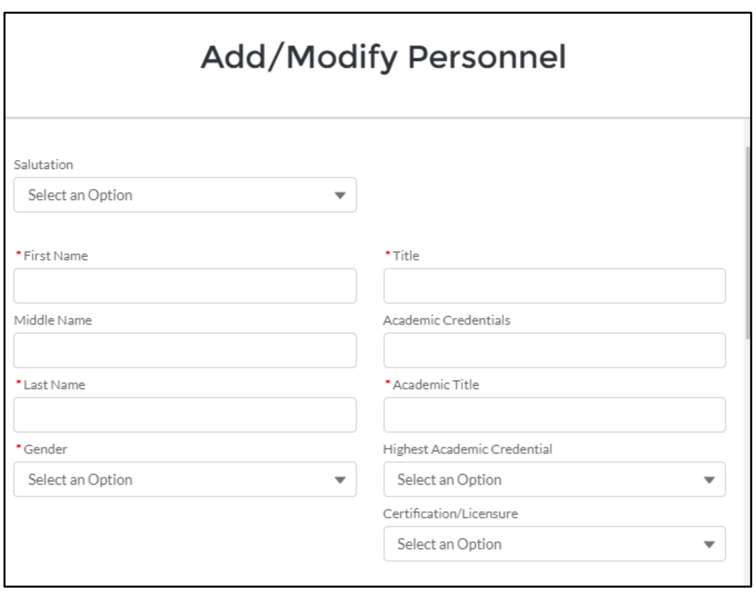
Note that for **didactic instructional faculty (IF)**, only the IF assigned to the program at 0.1 FTE or greater must be listed in the portal, but the program may choose to enter all IF, including those with less than 0.1 FTE, if it prefers. This may include those with a lecturer, adjunct faculty, or basic science faculty position. Preceptors are not added here as IF because they are covered by the SCPE sites.

"Add Contact" allows you to search first to ensure you have not already added this person. It will search your program records only (even the **hidden records of former personnel**). Click "Create New Contact" once you are sure that the person you are adding is not already in your program records (past or present).



Add/Modify Personnel

- **Salutation.** Enter the salutation or choose "other" for this new person. This is important as the ARC-PA uses it to address letters correctly. Please portalfeedback@arc-pa.org if a particular salutation is missing.
- **Name fields.** The **First Name** and **Last Name** are required. For the last name, enter only the last name and no credentials. For example, for Jane Smith, who is a physician, enter **Dr.** for the salutation, and enter **Smith** for the last name.
- **Title.** Enter the title of their position that matches their job description (principal faculty, didactic instructional faculty, associate program director, director of didactic education, dean, etc.). The program may change a title at any time within a given "key role". For example, a principal faculty member who moves into the director of didactic education position may be changed at any time by the program because the key role of the principal faculty did not change.
- **Academic Credentials.** Certifications and degrees normally included in a person's signature. For example, MS, PA-C, MD, etc.
- **Academic Title.** Enter the academic rank for faculty (i.e., clinical assistant professor, tenured



associate professor, etc.) or enter “staff” for staff members. Their job title goes above in the “Title” field.

- **Highest Academic Credential.** Select one of these options if it applies. Otherwise, do not select anything. Note that PharmD and other clinical doctorates not listed should choose the “clinical doctorate” option.
- **Certification/Licensure.** Select one of these options if it applies. Otherwise, do not select anything.

Email/Phone

- **Work Email.** This field is required. Email addresses are unique within the Portal, which is why they cannot be changed. Contact portalfeedback@arc-pa.org if a user’s email changes.
- In all other fields in this section, add relevant information as available.

Work Address

- **Work Address.** If the work address is the same as the program address, click **Same as program address**. Otherwise, enter the country, number/street, city, state, and postal code. Please update these for all personnel, especially those receiving correspondence from ARC-PA.

Key Role

- **Role.** Select the role they fill related to the standards-required personnel types. To change certain program personnel required by the Standards, a program change form must be submitted to ARC-PA in addition to changing it in the portal. For personnel who don't have a Standards-Required Role, leave it blank. If a person has more than one role, enter their primary standards-required role first. To add a person’s second role in the program (i.e., a medical director 25% and principal faculty 75%), see instructions below on adding a second key role. Notice that a key role cannot be changed. The old key role must be “ended” using the “position end date” and status of “former” before a new key role can be assigned. See below.
- **Status**. Mark current employees as current and former employees as former. When marking an employee as former, add a position end date in the section below. Setting a status of “former” will allow you to assign the person a new key role if needed.
- **Interim Role.** If the person is in an interim position (i.e., interim program director), check the interim role box.
- **Grant login access to the portal.** This deserves careful consideration! If the person should have portal access, check this box. They will then receive an email to set up their password. Once set up, they will have editing access to all program data, as well as any permissions for the annual report or budget selected in the boxes below the “grant login access” checkbox.

Program Information

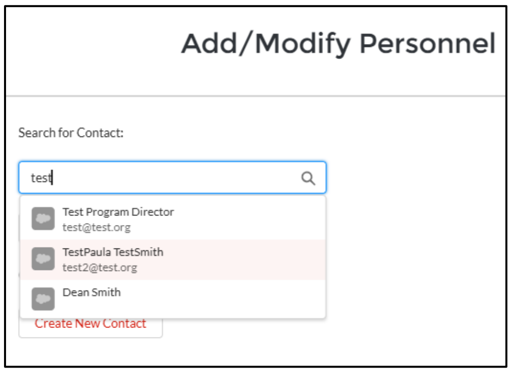
- **Program Hire Date.** This is the date the person started working with the program.
- **Position Start Date.** This is the date the person started their current key role.
- **Position End Date.** This is the date the person stopped working in this key role. Once entered, you would change their status to “former” in the Key Role section above. Leave this blank for any current key roles.
- **Program FTE Percent.** The percentage of time working for the program. This is the FTE of this key role only. Do not include FTE dedicated to other programs or schools. This is required by ARC-PA. Deans and Chief Administrative Officers will likely have a program FTE percentage of 0% if the PA program does not pay any of their salary.

Campus Information

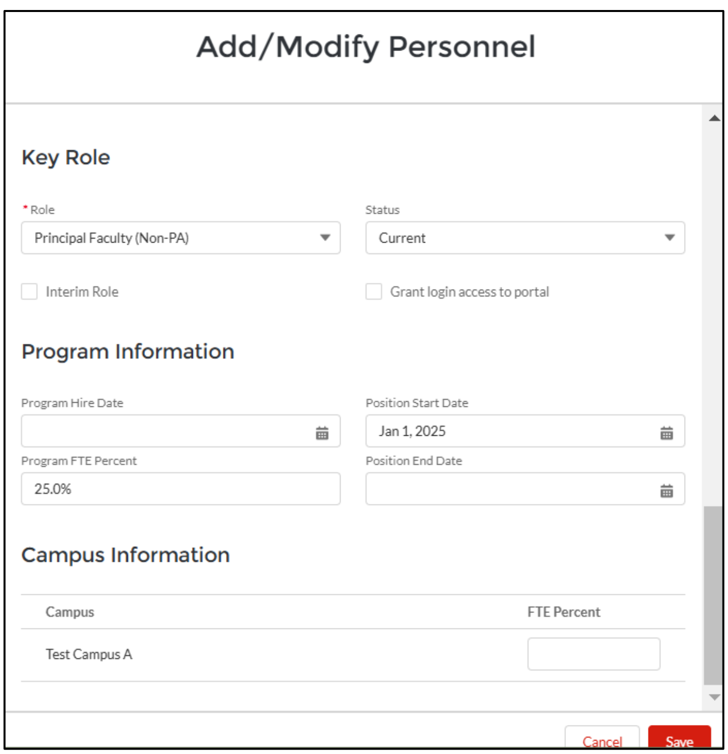
- **FTE Percent.** This section allows the program to allocate time across the main campus and distant campuses. If the program only has one campus, leave the person's whole FTE at the main campus. For example, if 50% was entered as the Program FTE Percent, and the program has two campuses, the percentages entered for the two campuses could be combinations such as 20 and 30, 10 and 40, 0 and 50, etc., as long as the sum is 50. If the person has a program key role at 75% effort and works in another department at the university for the other 25%, then the campus percent effort would be 100%.

Adding a Second Key Role

- Open the Personnel tab.
- Click on the red button in the middle/right side of the page that says "Add Contact."
- Search for the contact that you want to add a role to by typing part of their name and selecting it from the list that pops up. Then click "Use Selected Contact."



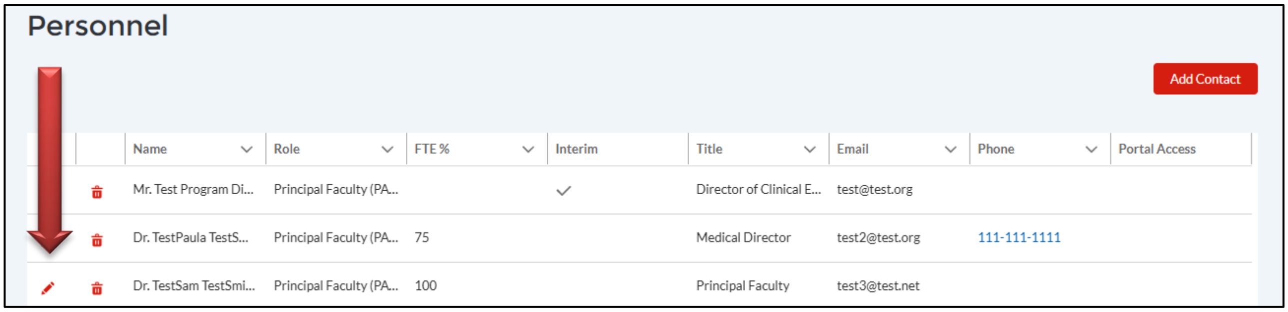
- Their personnel record will open now with a blank Key Role.
- Select the additional Key Role you want to add. For example, this is useful for medical directors who are 0.2 FTE medical director and 0.8 FTE principal faculty.
- Add the Program FTE Percent for that new role.
- Add the Position start date for that new role.



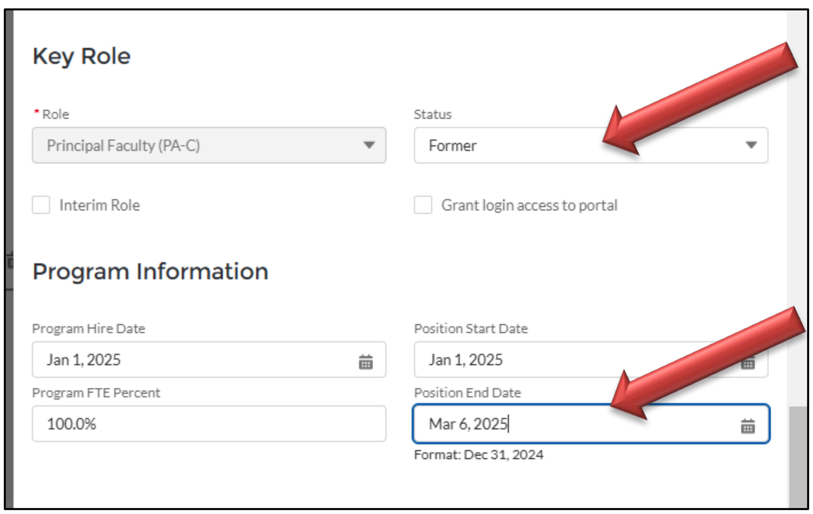
- Click Save. The record will now display in the Personnel list.

Changing a Key Role (and Promotions)

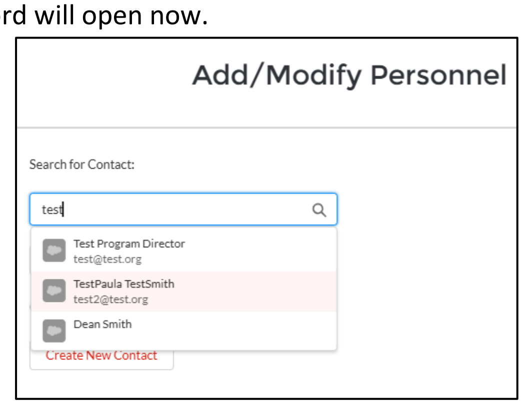
- Open the Personnel Tab
- Click the pencil icon to edit the personnel record that needs to change.



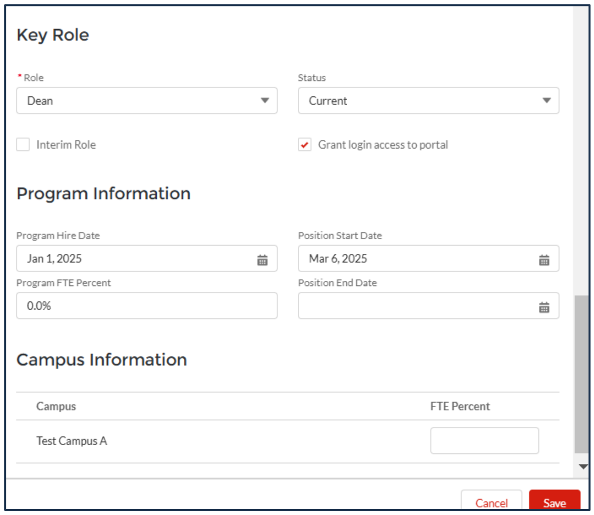
- In the Add/Modify Personnel box that pops up, scroll down to Key Role. For this Key Role, change the status to “former.”
- Enter a Position End Date.
- Click Save to continue.



- That role has disappeared from the Personnel list. Now add them in a different Key Role.
- Click on the red button in the middle/right side of the page that says “Add Contact”
- Search for the contact you want to add a new role to by typing part of their name and selecting it from the list that appears. If the name does not appear, wait a few minutes and try again. Then click “Use Selected Contact.”
- Their personnel record will open now.



- Edit the record as needed for their new role, including their Title in the first block, new address location, and add the new Key Role with current status. Grant portal access if appropriate.
- Add the original Program Hire Date and the New Position Start Date with Program FTE Percent for this Key Role

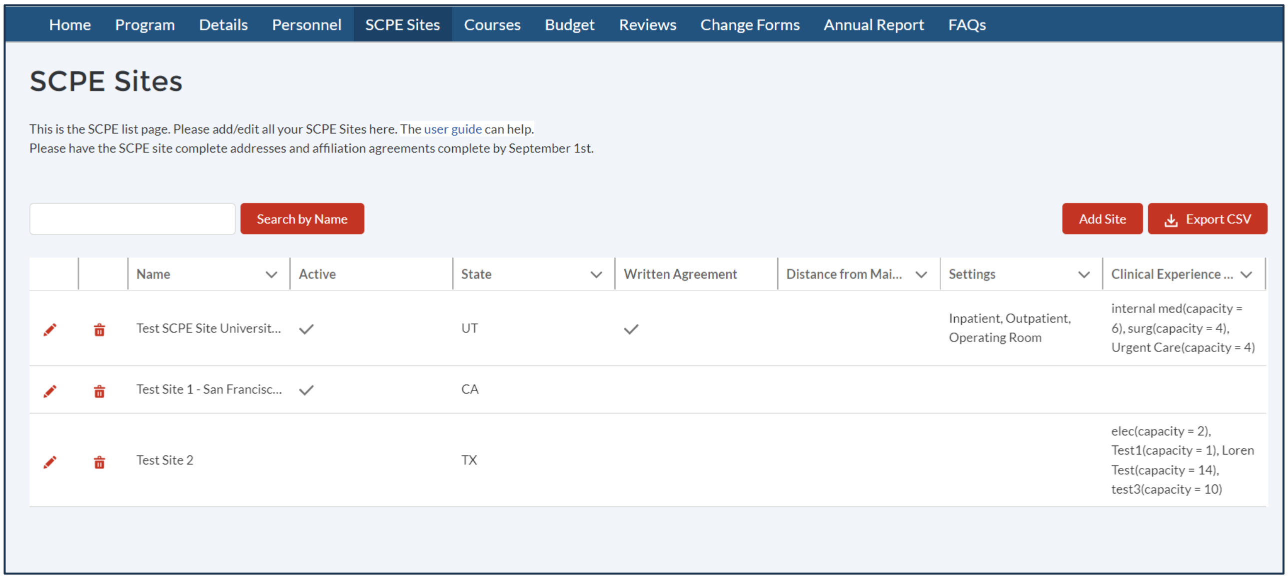


Faculty/Staff Attrition (For this Calendar Year)

This calendar year refers to the period from January to December of the current year. Calculate the percent attrition of principal faculty (PF) FTE and staff FTE by dividing the number of FTE for those who left their program role by the total number of FTE assigned to the program. Multiply the result by 100 to obtain the percentage attrition, expressed as a percentage. For example, if a 0.75 FTE principal faculty member leaves a program with 10 FTE principal faculty, the attrition rate is (0.75/10)*100=7.5% attrition. Note that the first attrition box is only for principal faculty (see glossary definition), which excludes program directors, medical directors, and instructional faculty.

SCPE Sites

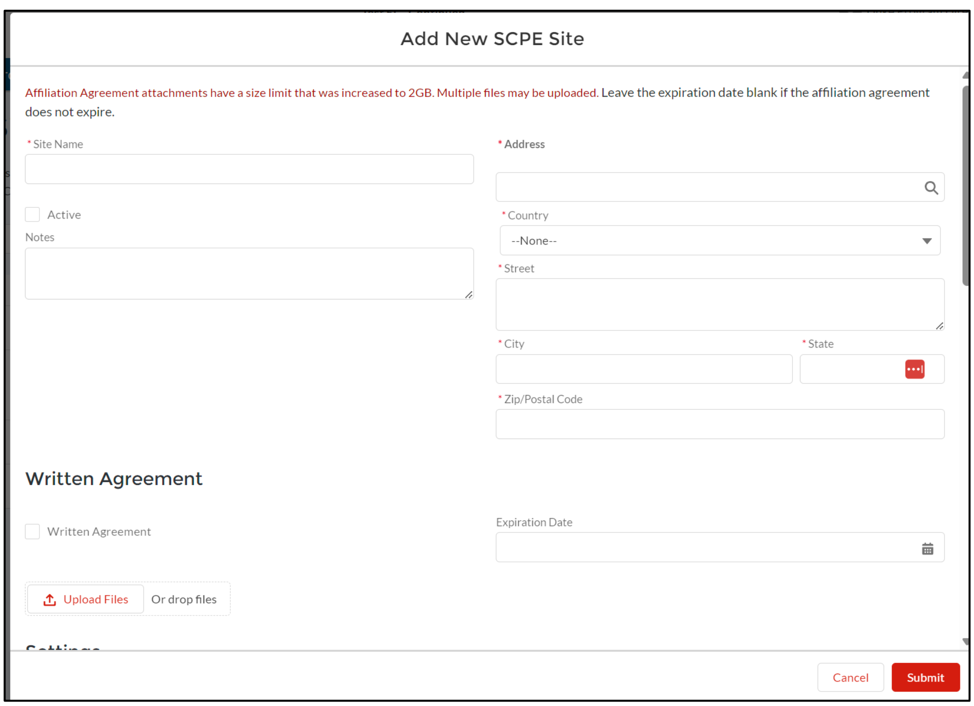
Select the **SCPE Sites** tab. You will see the following.



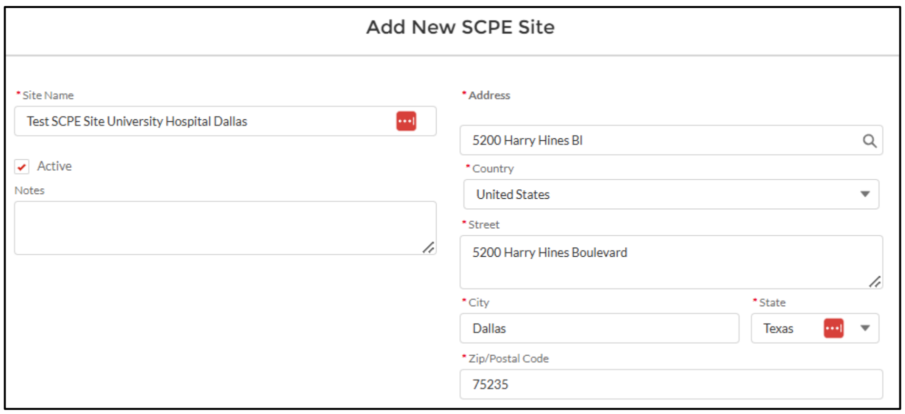
- You can add, edit, or delete supervised clinical practice experience (SCPE) sites as needed.
- Those marked **Active** are those sites planned for use during the **current clinical phase**. These may currently have students assigned or have stated that they can take a student in this cohort if needed.
- Use the **Export CSV** button on the right side of the page to export a list of SCPE sites.

To enter SCPE sites

- Click **Add Site**. The **Add New SCPE Site** dialog box appears.

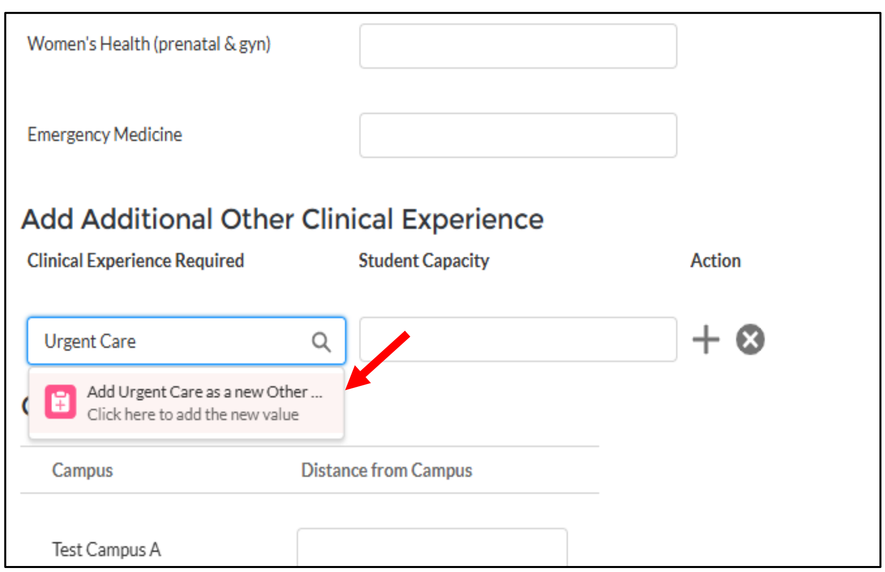


- Enter the **Site Name** and **Site State**. Do not separately list a single clinical site at a single location that offers multiple specialty experiences; instead, list it once, adding capacity at the bottom of this data box. As you enter each site, the Portal will arrange your data alphabetically. For an office setting site with a single provider, it may be appropriate to list that site by the last name of the provider, i.e., Smith, Joe, MD.
- Mark the site as **Active** if it is currently being used or planned for use during the **current clinical phase**. Active sites are ones that could be called upon to take a student. The program will need to provide information to meet the *Standards* on all active sites during accreditation applications and site visits. If a site is not currently available to take students, mark the site **as Inactive by deselecting the Active box** if you might change it in the future. Alternatively, you may delete the site from the portal if the program is certain that it will not be used in the future.
- **Address**. Add the address. Google will assist with the address, or you can enter it yourself.



- **Written Agreement**. Select the box for Written Agreement if a formal, fully-executed affiliation agreement for use of the site exists. Upload a copy of the most recent affiliation agreement and add its expiration date in the date field. If the affiliation agreement is "evergreen" or does not have an expiration date, leave that field blank.
- **Settings**. Select the type of setting or settings available at this site for the planned clinical experiences. This will be compared to the required clinical experience listed in the next section to ensure that, for example, if the program has student capacity in surgery, the operating room box is checked in this section for settings.
  - emergency department: located in a hospital setting (not an ambulatory/outpatient or urgent care setting).
  - inpatient: the setting is within the hospital; the patient is admitted for care.
  - operating room: the setting includes an actual operating room.
  - outpatient: the setting is ambulatory; the patient is not admitted for care longer than 24 hours.
- **Required Clinical Experiences and Capacity.** Enter the maximum number of students the site has agreed to take from the current clinical phase cohort by entering the number in the **Student Capacity** field next to the name of the experiences provided. This number is also referred to as the number of "slots" per year. Note: Clinical experiences that are not required by the program for ALL students are considered electives. Electives are not listed by discipline. Enter the student capacity number that the site will accommodate, regardless of the type of elective. For example, if a single site accommodates 6 students in an endocrinology elective and 3 students in a cardiology elective, enter 9 in the Student Capacity field.

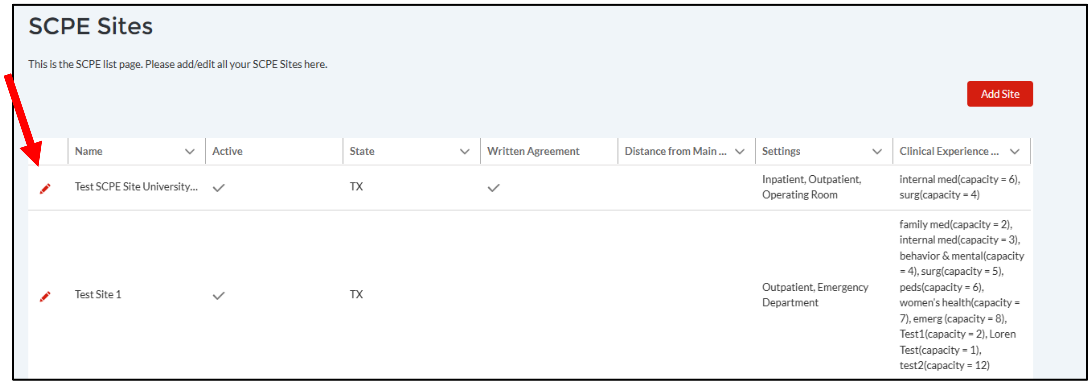
- **Add Additional Other Clinical Experience**. Add the type of experience required by the program for ALL students. Do not add each individual elective discipline here. This section is for adding rotations, such as Underserved Care or Urgent Care, when those are required rotations for every student. **You must click on the peach-colored pop-up box that prompts you to add the new rotation for it to be saved**. Enter the student capacity for each additional experience.



- **Distance from Campus**. Add the distance from the main campus and any distant campus(es). Use the scroll bar on the right side to see all clinical experiences and to add **Student Capacity**.

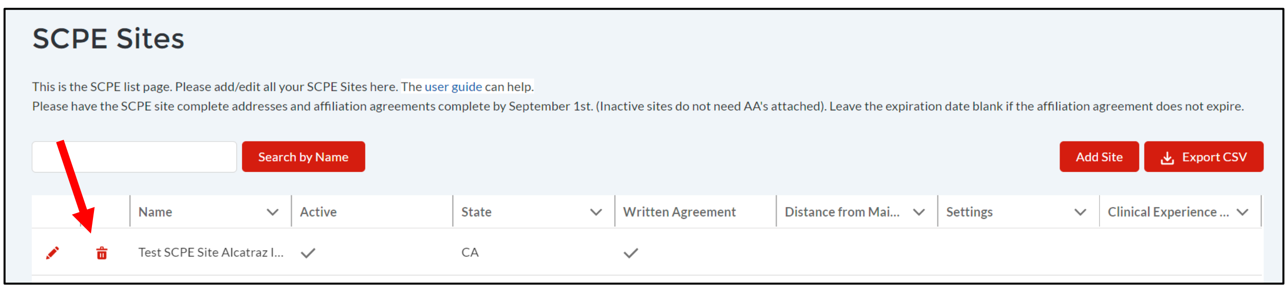
To edit SCPE sites

- Click the pencil icon next to the site you want to edit.
- Edit the fields you want to change and then click **Save**.



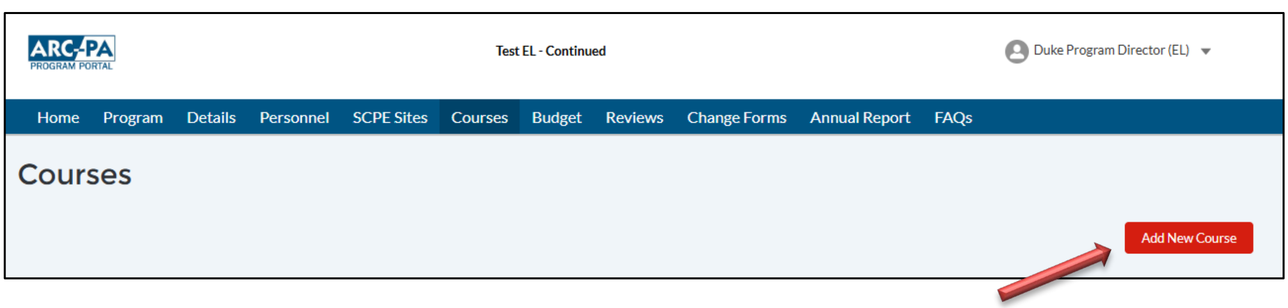
To delete SCPE sites

- Click **the trashcan icon** next to the site you want to delete.
- Click **OK**. The SCPE site is deleted. **Note:** Do not delete sites that may be used in the future; rather, mark these sites inactive to avoid having to re-enter all the data the next time the site is used.

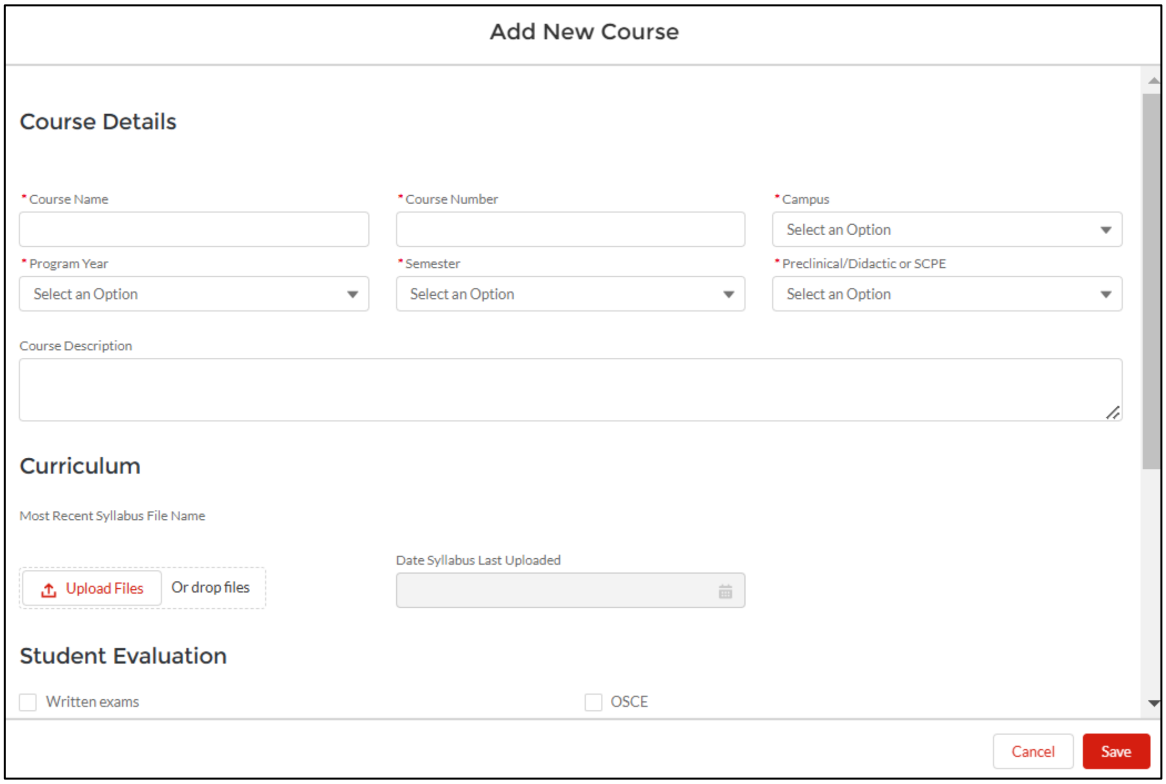


Courses

The courses tab is a list of all courses in the curriculum. Begin by clicking "Add New Course."



The Add New Course box will appear to enter information about the course. Add each course individually.



Course Details

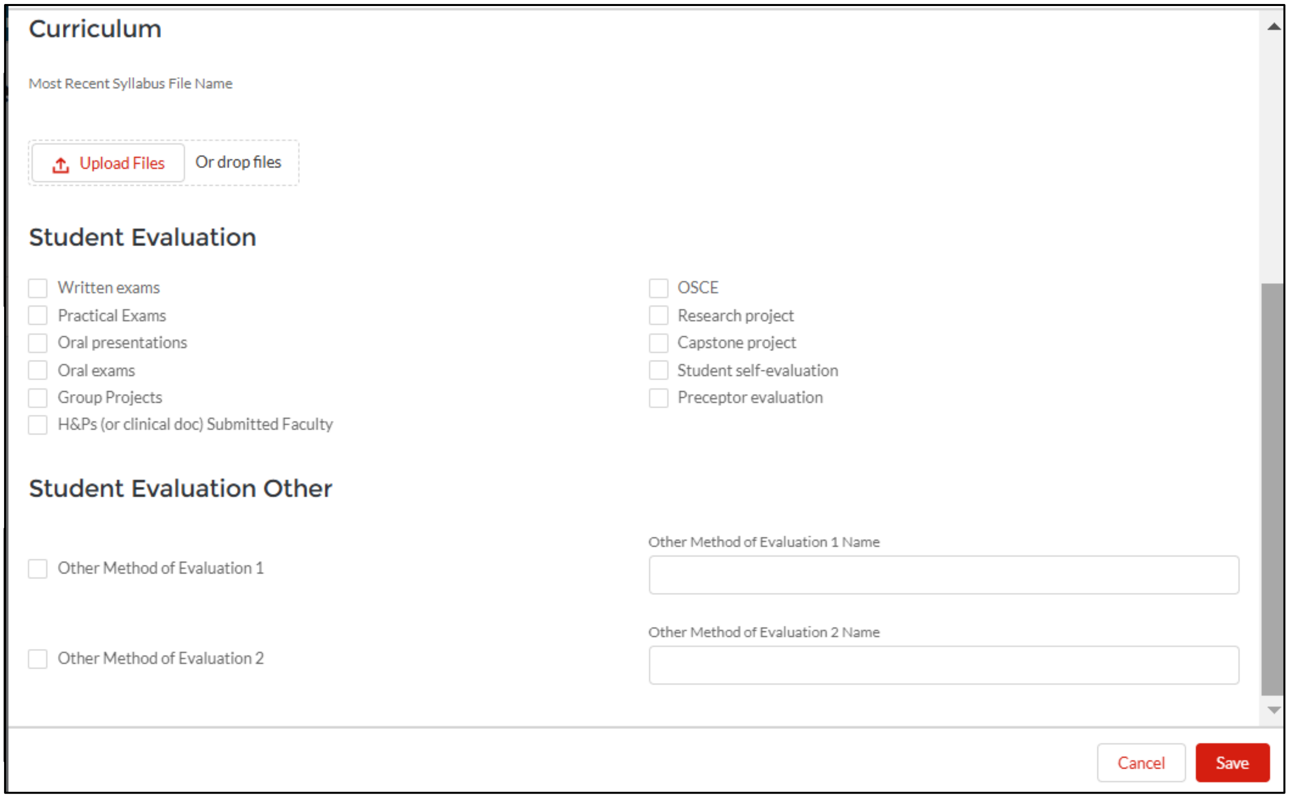
- **Course Name**. Enter the course's full name
- **Course Number**. Enter the course number in the format: PAS 5964
- **Program Year**. Enter the year that the course occurs within. For example, Preclinical/Didactic courses would typically be in year 1 or the beginning of year 2. SCPEs are typically year 2 and maybe year 3 (if a SCPE might be either year 2 or 3, you can just pick one or the other). Didactic courses in the clinical curriculum (i.e., call-back days and summative exam-type courses) would be year 2 or 3.
- **Semester**. Pick the earliest semester or term in which the course may occur. Semesters should be numbered beginning in year 1 with semester/term 1 and proceed without repeating numbers. For example, the first semester of year 2 would commonly be semester 4.
- **Preclinical/Didactic or SCPE**. Select the most appropriate for the course. For didactic-style courses occurring during the clinical curriculum, choose SCPE.
- **Course description**. Paste the course description from the syllabus in this box. This should also match the catalog description.

Curriculum

- Upload the syllabus in this area.

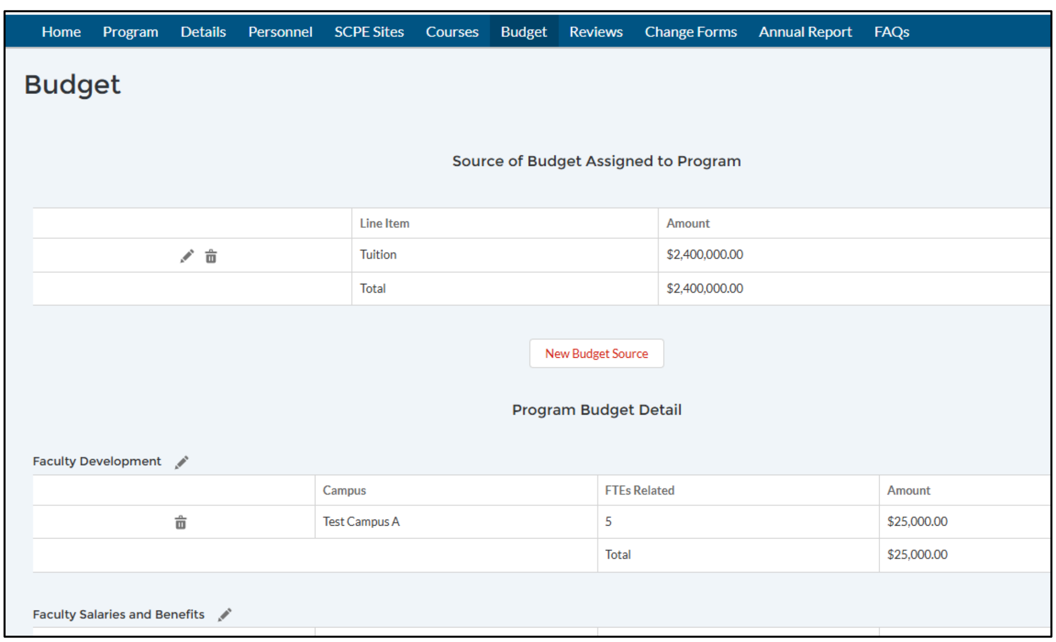
Student Evaluation

- Select all the ways that students are evaluated in the course. Use the "Other Method of Evaluation" box to add evaluations/assessments that were not listed.
- Click Save before leaving the course.

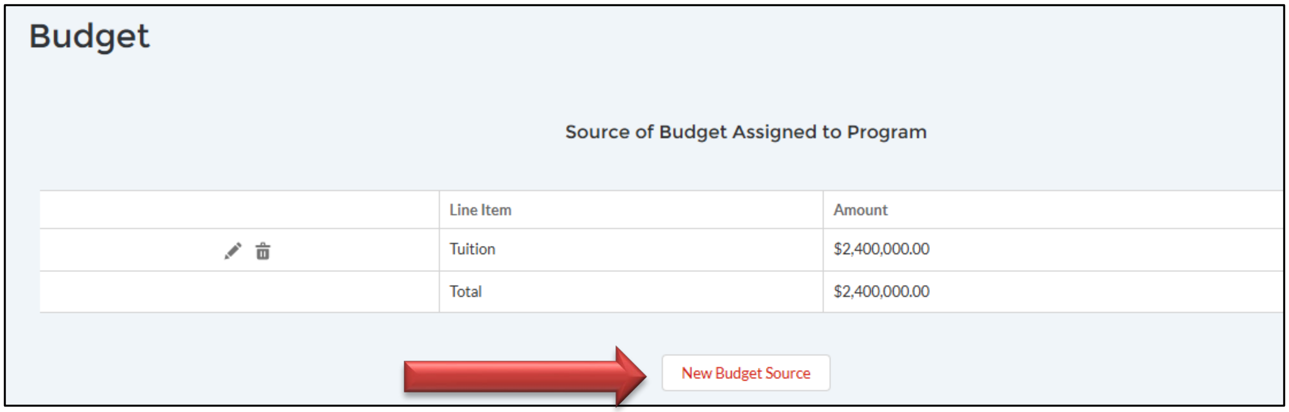


Budget

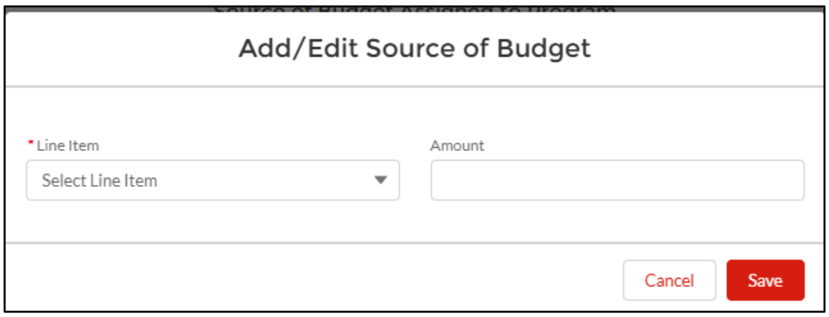
- Open the **Budget** tab. Here you can add, edit, and delete the program budget source lines (income) and budget detail lines (expenses). You cannot enter the same line item twice. *If line items not seen on this page are seen on the "budget export csv" file, please email portalfeedback@arc-pa.org for assistance.



To enter **Sources of Budget Assigned to the Program,** click New Budget Source.

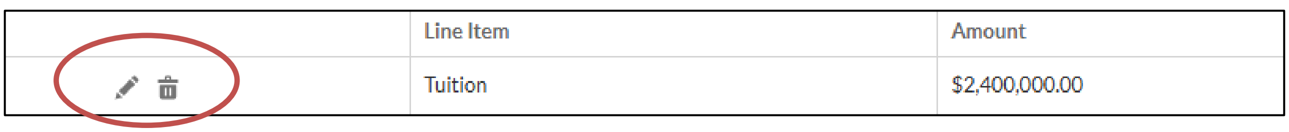


The Add/Edit Source of Budget box appears:



Select the source of the dollars assigned to the program and enter the amount.

The item is added to the Source of Budget list. Each budget line item has a pencil icon for editing and a trashcan icon to delete the line item in the column before the name of the budget source.

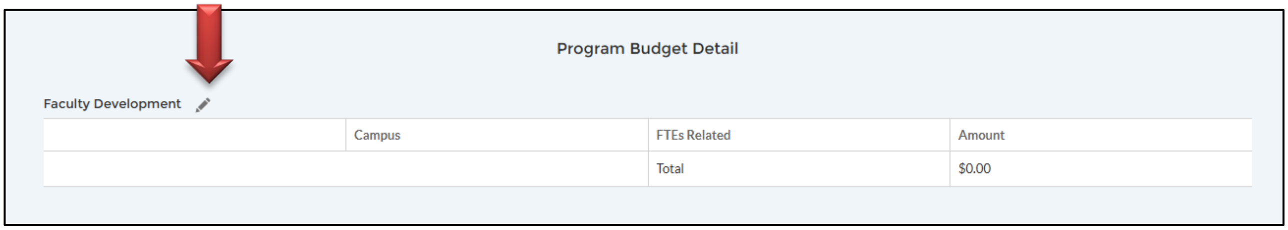


Budget Detail

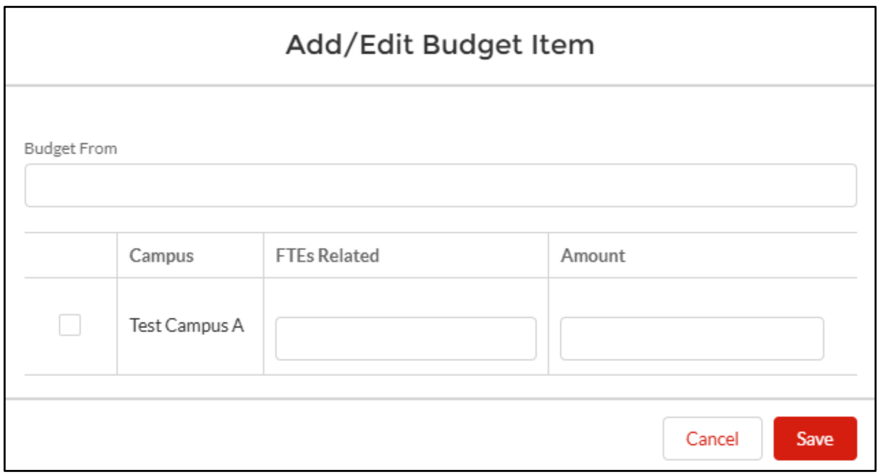
To enter the Program Budget Detail of expenses, click the pencil icon next to each category of expenses to add a record. At a minimum, the expenditures included in the Budget Tab must include the following, regardless of whether they are budgeted for from the PA Program budget or another departmental/institutional budget:

- Faculty salaries and benefits
- Staff salaries and benefits
- Faculty development (Funding provided to the program director and principal faculty in support of maintenance of certification, licensure, and professional development directly relevant to PA education.)

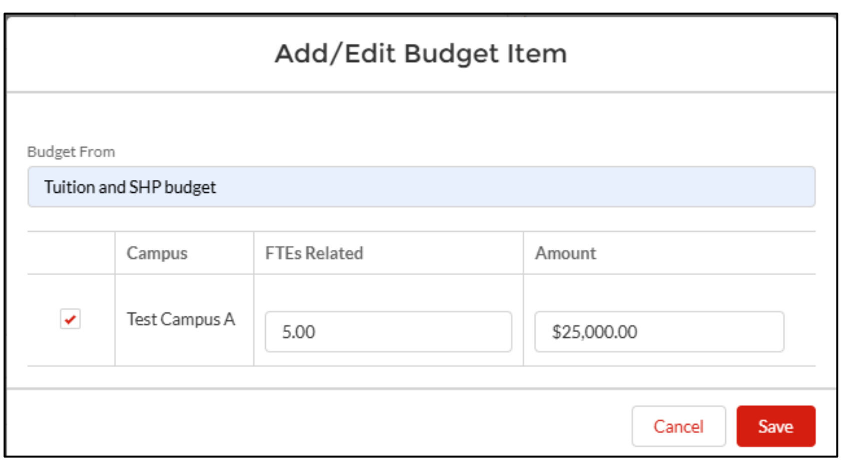
- Operations. This is the total program budget less salaries/benefits and faculty development already detailed in this section.



The Add/Edit Budget Item box will open

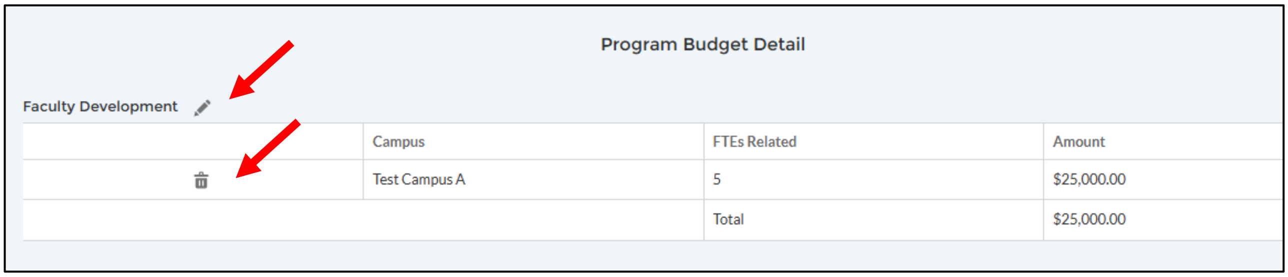


- In the "**Budgeted From**" box, type in all sources of the funds. For example, staff salaries and benefits may be budgeted from both the program's tuition budget and the School of Health Professions budget, so the entry would read "tuition and SHP budget."
- Under the **Campus** section, select the campus(es) that uses the line item. Enter the amount of the line item allocated to each campus and the number of FTEs related to the line item if applicable (salaries and faculty development require FTEs, where the operations budget does not).
- Click **Save** when you are finished.



To edit or delete a Budget Source or Detail Line

If you need to change the amount of a line item, or you entered a line item in error, use the pencil icon to **Edit** and/or the trashcan icon to **Delete** it.



Exporting the Budget

To export the budget, click the “Export CSV” red button on the top right corner of the Budget page.

Reviews (feature coming soon)

This tab contains information about upcoming accreditation review cycles and past accreditation reviews done since this portal was launched in 2025. Programs with upcoming review cycles will be contacted individually to utilize the online application feature.

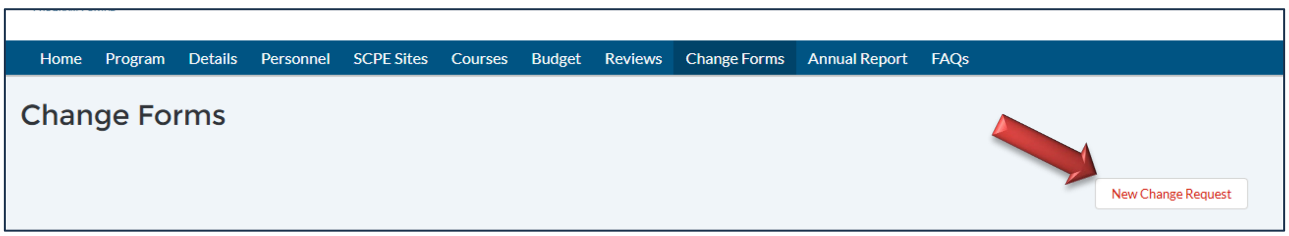
Reports due to ARC-PA from the program will be submitted here. (feature coming soon)

- PANCE reports
- Attrition reports
- Citations reports
- Follow-up reports

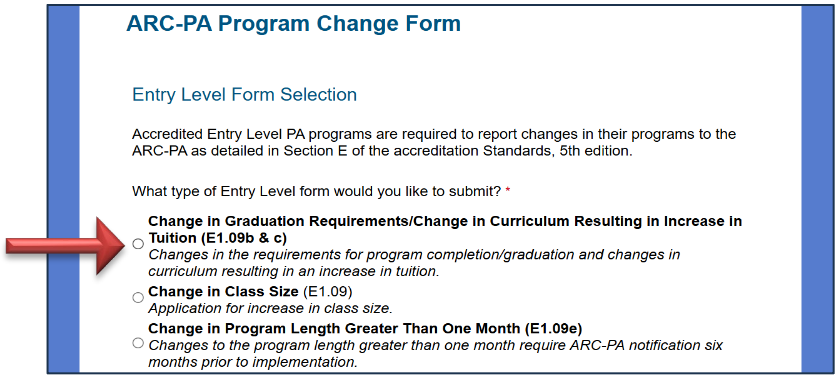
Change Forms

This tab contains the change forms previously available for download on the website. They will be completed and submitted entirely in the portal. Copies of these forms may be previewed online at: https://www.arc-pa.org/entry-level-accreditation/program-change-forms/

- To begin, click the New Change Request button on the right side of the page.



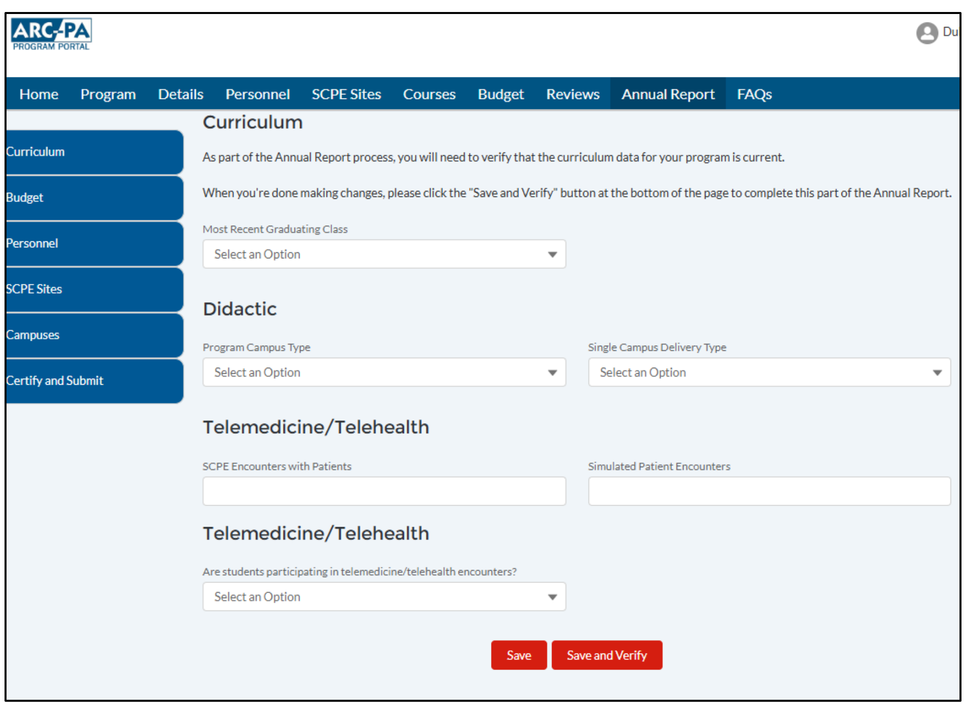
- Select the change form needed from the list by clicking in the circle to the left of the form name and description. The form options include:
    - Change in Graduation Requirements/Change in Curriculum Resulting in Increase in Tuition (E1.09b & c)
    - Change in Class Size (E1.09)
    - Exceeding Approved Class Size (E1.11a)
    - Change in Program Length Greater Than One Month (E1.09e)
    - Change in Academic Degree Awarded (E1.10)
    - Change/Decrease in Program Fiscal Support (E1.11b)
    - Change in Program Sponsorship (E1.12)
    - Change in Program Sponsoring Institutional Personnel
    - Program Faculty - Temporary Vacancy (E1.08)
    - Change in Program Faculty (E1.04)
    - Quarterly Reports (E1.05)



- Select the form you want to use, scroll down, and click "Next" to continue.
- The fillable form will open. Complete the form. Information from your portal will already be entered in the form, such as the program name and the program director's name.
- Upload any needed documents where prompted. These may include letters of approval from the institution or other supporting documentation.
- When complete, click Continue to Signature Page.
- The signature page allows you to review your submission before signing. There is an option at the bottom to go back and make a correction, if needed, prior to signing.
- When complete, sign and click submit signed response. Please note that these forms must be submitted by the program director.

Annual Report

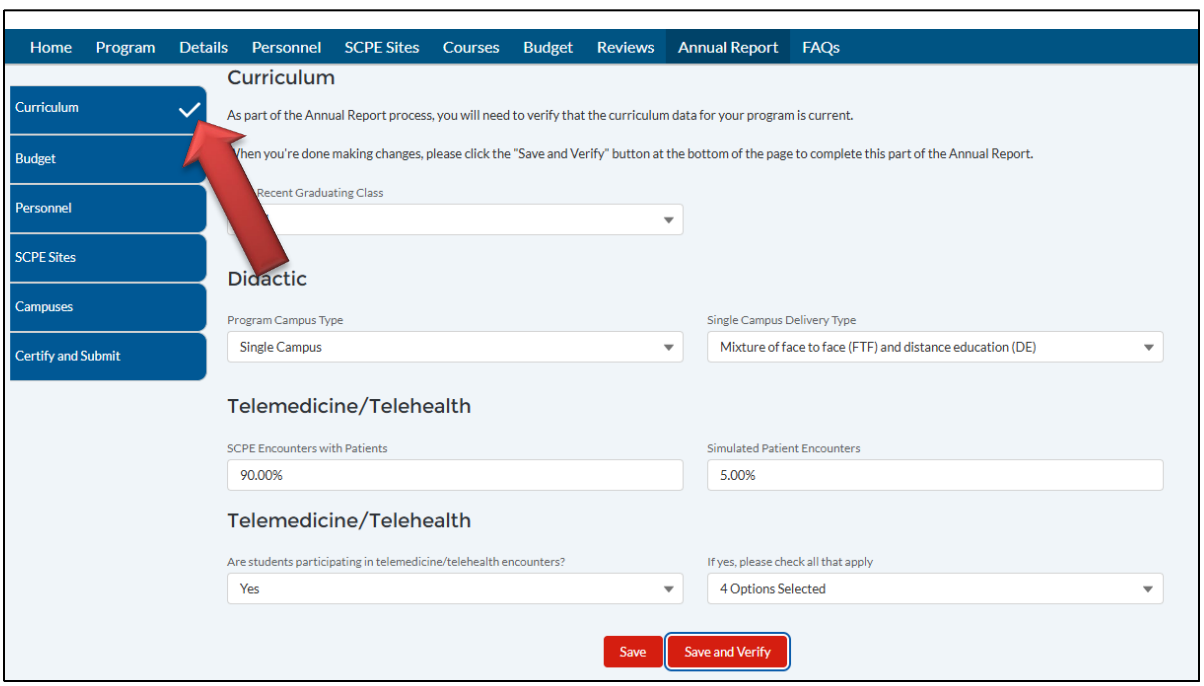
Click the Annual Report tab. The first page that shows up looks like this:



The Annual Report consists of the information on this page and the verification that the information on the other tabs is complete and correct. Use the "**Save" button** to save work as you go. Use the "**Save and Verify**" once the information on the page is ready to be submitted. This will cause the checklist on the left of the page to put a checkmark by the page name that has been verified. Submission of the annual report is a separate step.

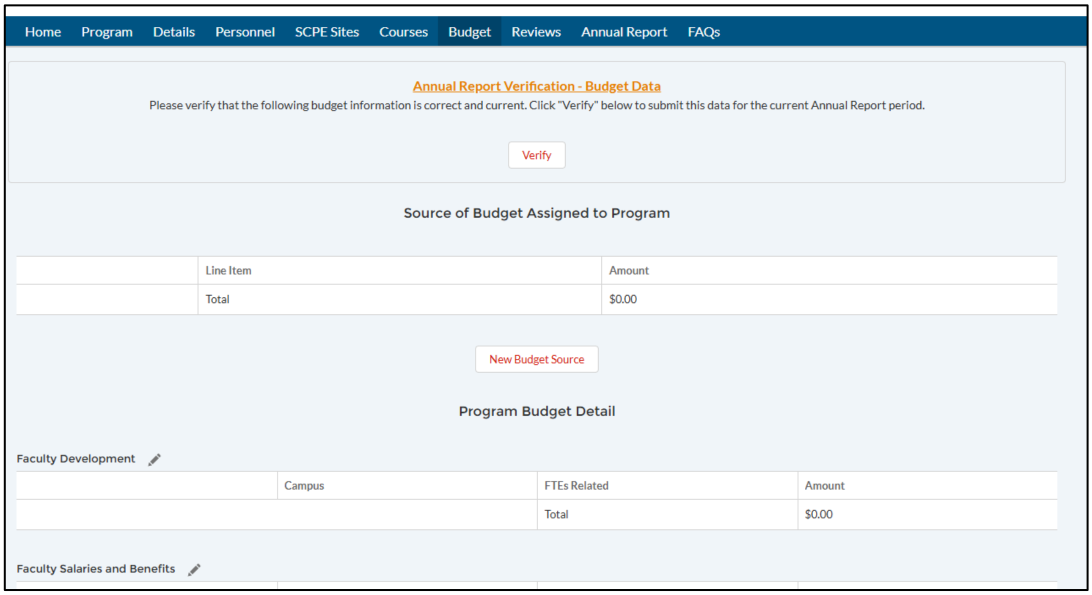
For the **Curriculum**,

- Select the year of the most recent graduating cohort, then answer the curriculum questions based on that cohort's experiences in the program.
- The program is asked to answer several questions about its **didactic curriculum** including whether all courses are taught "face-to-face" (FTF), all courses are taught via distance education, or if there is a mixture within the curriculum (or within courses) of face-to-face and distance education. If any of the contact hours for the course are delivered by distance education, please count the course as distance education for purposes of this question. The program will report how the curriculum is delivered in a single-campus or multi-campus program.
- **For the Clinical Curriculum**, the program is asked to provide the **approximate percentage** of clinical encounters within the clinical phase of the program that utilizes 1. "SCPE encounters with patients" (for the purpose of this question, include telehealth or telemedicine with real patients) and 2. "simulated patient encounters" (encounters using simulation to deliver clinical instruction), whether using technology or standardized patients.
- **Telemedicine/Telehealth** enables healthcare practitioners to provide care for patients without requiring an in-person office visit. Telehealth is done primarily online. Report whether or not students are participating in telemedicine/telehealth encounters as a yes/no response. If Yes is selected, then in the next field, select all of the SCPEs where students may see patients using telemedicine.
- **Save and Verify** lets you mark this as complete and ready to submit for the annual report. See in the image below that the Curriculum is checked as complete in the checklist.

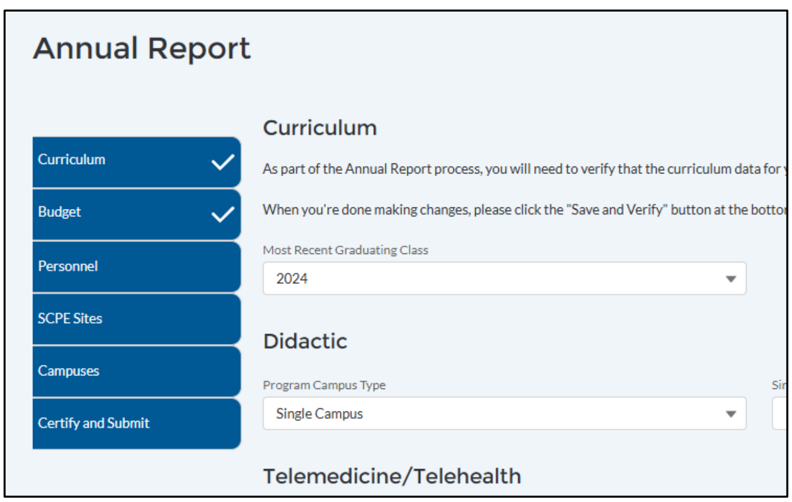


Next, for the annual report, work down the left-side panel checklist. Click on Budget.

It will give you instructions at the top of the page and invite you to view your budget. Click View Budget. It will take you to this page:

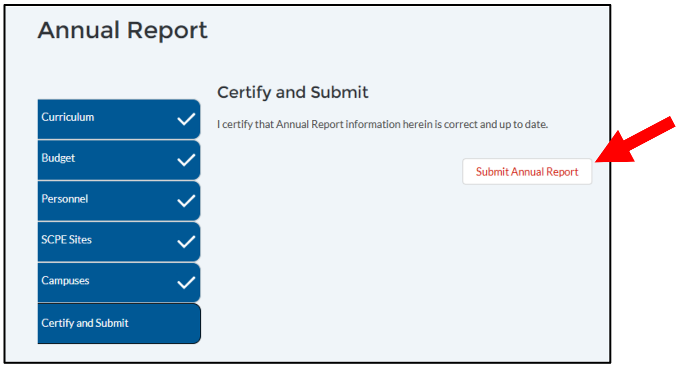


- Enter or edit budget information as described above in the budget section. Once everything is complete and correct, click 'Verify' at the top of the page.
- That will return you to the Annual report page, and now the budget is checked as verified.

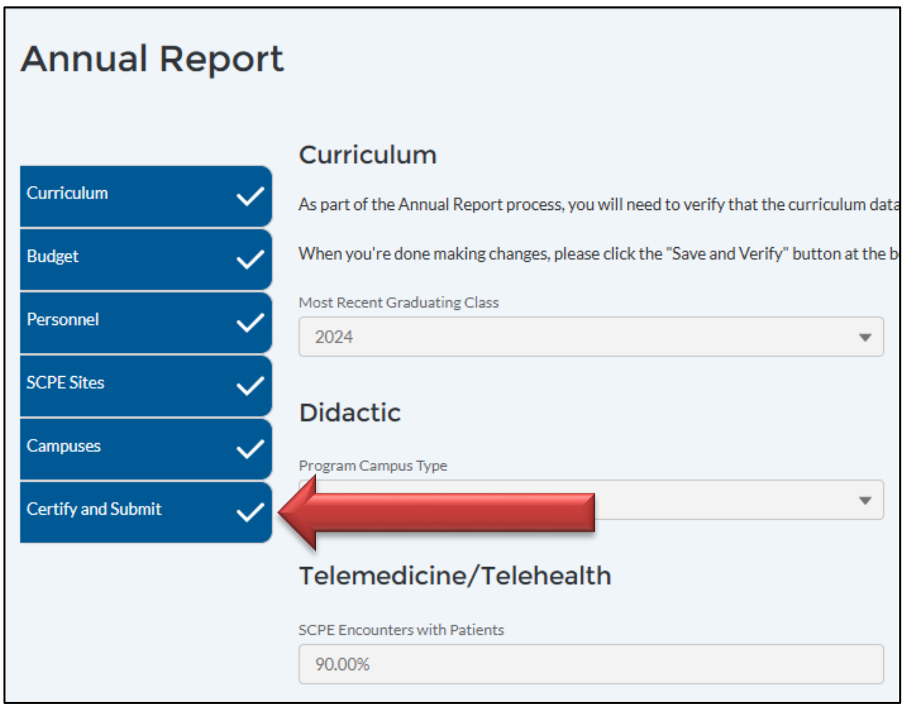


Repeat this verification process for each item on the checklist. The version of each page that was "verified" will be what is submitted with the annual report.

To submit the annual report, the program director will click the "Certify and Submit" button at the bottom of the checklist. That will bring up this page:



Once everything is complete and correct, the program director will click "**submit annual report**". A brief success message will temporarily appear at the top of the screen, and then the Certify and Submit box on the left checklist will be checked.



Following the annual report submission, the program may resume normal portal use.