

Table 5A: Tenure for Health Center Staff

Hi, welcome and thanks for joining today to learn about Table 5A: Tenure for Health Center Staff.

Please click the START button to begin.

Welcome

I'm Steve, your UDS Report expert for this training, and I am here to help you complete Table 5A.

This table is important in understanding continuity of care and the retention of health center leadership.

Introductions

Let's start with introductions.

- If you'd like, please let me know who you are by typing your name in the box. This information is just used as we interact during this session and is not saved.
- If you don't want to enter your name, just click **Sign In**.

Get Started or View Navigation

If you've been here before and know how to use the navigational features, you can go straight to the training by clicking on the **LET'S GET STARTED button**.

If you'd like to learn more about our training's navigational features - click on the **HOW TO NAVIGATE button** to continue.

Navigation: Table of Contents & Transcript

Before I go on - if you are interested in hearing the audio narration, please be sure to adjust your computer speakers so that you can hear me.

If you would like to read the transcript, you can see it over here in the "TRANSCRIPT" tab on the LEFT of your screen.

Also ON THE LEFT of the screen, you'll see a tab that says "TABLE OF CONTENTS." You can use this tab to go anywhere you want within this course. You may find it useful if you want to review something specific about Table 5A. In that case, you can just click on any of the topics listed and jump to that particular section of the course. If you would like an overview that covers all the topics, just stick with me.

Navigation: Play, Previous, Next

AT THE BOTTOM of the screen, you'll see a control bar with navigation controls and buttons that will let you adjust your viewing experience:

- If you want to stop the video, just hit the play button once (to pause), then hit it again to resume.
- You can also slide the progress bar to the left if you would like to repeat some of the material, or slide it to the right to jump ahead.
- To go to the slide just before or to proceed to the next slide, use the buttons to the right of the control bar labeled "PREVIOUS" and "NEXT."

Navigation: Resources, Main Menu, Exit

There are several links AT THE TOP RIGHT of your screen:

- If you click on the RESOURCES link, you will see additional files and links to websites that will help you in completing your Report. You can also download a copy of the Transcript here;
- If you click on the MAIN MENU link, you can return to the UDS Learning Center's library; and
- When you're done, click on the EXIT link, and you will exit the course entirely.

Navigation: Icons

Throughout the course you will see icons that you can click on to:

- View or print the UDS tables;
- Refer to the UDS Manual;
- See helpful hints that should help you with your UDS Report; or
- Take you to a Case Study example to see how all of the UDS data works together.

One last thing before we begin - if you need to leave this training early and return to it later, you can do that. When you come back next time, we will remember where you left off and ask you whether you want to continue from there or start again from the beginning.

I think that covers the details about how to move through the course. Let's get started!

What is Table 5A?

So, what is Table 5A?

What is Table 5A?

Table 5A, Tenure for Health Center Staff, is part of the Staffing & Utilization Profile for the UDS Report.

Every health center will complete it each year as part of their Universal Report only. It is not included in Grant Reports.

What is Table 5A?

In Table 5A, you will provide information about the tenure of selected clinical and key management staff who were working at your health center as of the last day of the reporting year (December 31st).

Why are these data important?

The data on Table 5A are used by the Bureau of Primary Health Care (BPHC) to evaluate the continuity of key health center leadership and clinical staff. Health Centers can also use this information to assess staff longevity and/or turnover.

How you use the information is up to you. It is all available to you so remember it as a resource that can help support your work!

Learning Objectives

Given the importance of the data and its variety of uses, we're looking forward to spending this time together to help you report as accurately and as efficiently as possible!

Learning Objectives

By the end of this course, we hope that you will be ready to:

- Calculate staff tenure;

Learning Objectives

- Report tenure for selected leadership and clinical staff;

Learning Objectives

- And, complete Table 5A so that it is consistent with how you reported the same staff last year and with what you are reporting on this year's Table 5: Staffing & Utilization.

Rate your level of confidence with Table 5A

Before we get into the details of this session-let's hear from you! Based on your experience last year, tell us how confident you feel about reporting Table 5A by choosing one of these options. If this is your first year completing this table-there's an option there for you as well. Would you say...

- 1)** We're feeling pretty confident-we always ace this one!
- 2)** We're feeling pretty good about it-last year our Reviewer checked with us on this one, and we were able to explain or correct the data pretty easily.
- 3)** We could use more help-last year we really struggled with this table; or,
- 4)** We're new to this-this is our health center's first time submitting the UDS report.

We're Confident RESPONSE

Excellent! Then this training will be a helpful review for you.

We're Good RESPONSE

Great! We'll work together today to help you submit an accurate Table 5A!

We Need More Help RESPONSE

Well then, you're in the right place! We hope to cover all of your questions here today.

We're New RESPONSE

Welcome! Let's see if we can help you do this table right the first time!

Key Terms

Let's go over some of the key terms that will be important for understanding this table. I'll spend more time on each of these in today's training, but I'd like to take a minute to mention them here. If you want to view the portion of the UDS Manual that provides more detailed definitions of each of these terms, please click on the icon.

On Table 5A, you will report on two different categories of staff:

- "Full-time" and "part-time" staff - referring to people who are considered regular employees of your health center. This includes staff employed or contracted to work for your health center, or working for your health center under another **formal** working arrangement, such as National Health Service Corps (NHSC) assignees.
- "Locum, On-call, etc." - referring to other types of service providers that health centers sometimes use to provide services to patients. More specifically, these include: locum tenens, on-call providers, volunteers, residents/trainees, off-site contract providers, and non-clinical management consultants.
- We will talk about "persons" who make up the census on Table 5A. What we mean is that when including someone on this table, each individual will be counted as "1 person," regardless of how long they've worked there or whether they are working part-time. It is not the same as the full-time equivalent or FTE numbers that you report on Table 5. In summary, if the individual is working at your health center on the last day of the reporting year, they will be counted as "1" person on Table 5A.
- We will also talk about tenure in terms of "continuous months" - referring to the number of continuous months a person has been in their current position, based on their date of hire.

Table 5A: Instructions

With that brief overview and an idea of how you're feeling about Table 5A, let's go ahead and jump into the step-by-step instructions on how to complete it accurately and make it an easier task this year.

Table 5A: columns

First, I should mention that if you would like to look at Table 5A in its entirety (or maybe even print it out) - just click on the VIEW UDS TABLES icon. You might find it helpful to have a copy as we go through the course.

OK, let's start by going over how Table 5A is laid out. First, we'll talk about the columns.

Looking at the table, you'll see that in the:

- First column (to the far left), are the titles for key health center staff; and
- The second and third columns are where you'll report on two categories of staff:
 - Full- and part-time staff; and
 - Locums, on-call, and others.

Don't worry, we'll give you more information about each of these categories a little later in the course.

Did you know: Wrong months

Did you know that often health centers report too few or too many months of tenure for their health center staff? We'll talk about this again a little later in the course. Just know that, if you had trouble with either of those two issues, you're not alone.

Table 5A: columns

Beneath each of those staff categories we just mentioned are 4 columns that you will use to report information about staff in each of those categories:

- In columns (a) and (c) - you will report on the number of individuals in each position; and
- In columns (b) and (d) - you will report the total months of continuous work for each position listed.

Seems easy enough, right? Great, then let's get into the details of each of these columns.

Table 5A: Health Center Staff

The first column (Health Center Staff), on the far left, is where the titles for the key health center staff are listed.

- If you look at the full table, you may notice that not all of the staff that are listed on Table 5 are included here. Look closer and you may notice that non-clinical providers (other than leadership/ management) and providers of enabling and “other professional” services are the staff that are excluded from Table 5A. On Table 5A we're only focusing on key clinical providers and health center leadership, so you will not need to report tenure for all of your health center staff, just those listed on the table. For any position that your health center doesn't have, just leave that line blank. For example, if you do not have a Chief Operating Officer, or COO, you can just leave it blank and continue with those you do have.
- We've tried to keep this simple by using the **same definitions** for the staff titles as we used on Table 5 **and** by using corresponding line numbers to those on Table 5. So, when you go down the list on Table 5A, you may notice that there are lines 1, 2, 3, 4, 5, but no 6. Well, that's because, if you look at line 6 on Table 5, that line is a blank/grayed out line, so there is no corresponding staff title. You'll simply need to match up the line number from Table 5 to Table 5A to know that you're reporting the right staff on the right line.

Table 5A: Full- and part-time staff

The second and third columns are where we said you would report on two categories of staff. When we talked about the key terms for this table, we gave you a brief description of who should be included in each category. But, let's make sure we give you all of the information you'll need to complete this part of the report.

When reporting "full-time" and "part-time" staff be sure to include all of the following:

- Staff employed by the health center that receive benefits, and have taxes withheld from their paychecks.
- Staff employed for a specific period of the year because of a recurring need. This would be common in centers that serve in areas with large numbers of fisheries, agriculture, canneries, or recreational areas. To be included, staff must be working at the time of the census (December 31st) or under agreement to return to the clinic the following year.
- Contractors who work regular, assigned hours every day, or every week, or every month. So, someone who is considered a regular staff member.
- National Health Service Corps (NHSC) members assigned to your health center. You should include members of the "ready reserve." These are employees of the US Government, and your health center may or may not have a contract with the NHSC to pay a specific amount to cover the cost of their assignment.

To view detailed definitions for each of these categories in the UDS Manual, click on the icon.

Table 5A: Locum, On-call, and others

The last set of columns on Table 5A is where you'll report staff **other than** "regular" health center employees. These would include providers that you use on a regular basis and who are a regular part of your ongoing operations.

You may use different names or titles to describe these types of employees, but to make sure we're all reporting them the same way, we have some definitions for each of these staff:

- First, we have, **locum tenens and on-call providers** - these would be individuals who work at your health center on an "as needed" basis, most often to fill in for the part-time absence of another one of your providers. If the person does not work at your health center often, or does not work a regular schedule, you **would not** include them here;
- Then, **volunteers** - this would include individuals who have a regular schedule, but who you do not pay and who do not receive benefits; and
- **Residents or trainees** - if you're including a medical resident, you will need to make sure to report them on the line on Table 5A for which they are receiving training (e.g., pediatrician). If you're including a mental health intern/resident, then you will report them on the line on Table 5A based on their current licensure. For example, a psychology resident may be a Licensed Clinical Social Worker, in which case they would be reported on Line 20a2 (Licensed Clinical Social Workers).

In some instances, you may also use contractors or consultants to work at your health center. If these individuals are considered regular employees, then you will include them on Table 5A. The types of staff you might include are:

- **Off-site contract providers** - or providers who work at one of your out-of-scope sites, but who you contract with at specific times to provide services at one of your in-scope sites. Remember, if you only pay this type of individual "by the visit," you will not include them here. We want to make sure we're only including regular staff on Table 5A.
- **Non-clinical consultants** - these would include individuals that smaller organizations may use to help fill administrative (non-clinical) roles when they are unable to recruit or support full-time health center management. If you use these types of staff consultants, you will report them on Lines 30a1-30a4.

Again, if you would like to read more about each of these categories, click on the UDS Manual icon.

Columns a & c (persons)

Let's move down Table 5A a little more and get into the details of what you will be reporting about each of the health center staff, starting with who you will include in columns a and c.

In columns a and c on Table 5A, you will report a count of:

- All individuals working on the last day of the year; OR
- Those who are current employees/contractors/others who have that day off (vacation, sick, short-term leave) but are scheduled to return on a specific day. So, this means that you would include any locums, on-call providers, residents, volunteers etc. who are scheduled to work before and after the last day of the reporting year.

In other words, you should count any person that you consider to be part of your "regular" health center staff, in columns a and c.

Let me give you a couple of examples:

- Let's say you have a specialist who works for you and comes into your health center only once a month. You would count that person on Table 5A because they are a regularly-scheduled health center employee; and
- You have a primary care provider who works for you every year, but only during a specific season when you need him. You would also count them on Table 5A. They are someone who is regularly-scheduled to work with you each year.

Columns a & c (persons)

The only staff we do not want you to count on Table 5A is anyone who you would not consider regular staff.

So, this might be someone you used in the past, but that you do not intend to use again in the future, or someone who was employed or contracted by you earlier in the year, but who no longer works for you (as of the last day of the year). We only want you to include regular health center staff who currently work for you.

Columns a & c (persons)

That seems easy enough, right?

Now let's talk about how you will report these staff on Table 5A.

- Unlike Table 5, when reporting on Table 5A, you will not consider FTEs. Instead, you will count each individual who serves in one of the positions on Table 5A as "1 person." This is, essentially, a headcount of your staff as of the last day of the reporting year.

Columns a & c (persons)

But, what if you have staff who serve in more than one role?

Well, let's say you have a Family Physician who is also your Medical Director. You will count that person once on the Family Physician line (Line 1) and once on the Chief Medical Officer line (Line 30a2). Remember, what is important here is that we count that person once for each of their current positions (as of the last day of the reporting year). We'll talk more about this later but I'd like to mention one other key point here-if the person started the positions on different dates, the reported tenure will be different. They may have 27 months in the Family Physician line and 5 months on the Medical Director line.

We'll get to more about that shortly. Let's keep going.

Columns b & d (months)

Now that you know **who to include** on Table 5A and **how to count** them in columns a and c, let's continue on and talk about reporting total months for these staff in columns b and d.

Unlike Table 5 (where you reported staff FTEs), in columns b and d on Table 5A you will report tenure as the number of "continuous months" each person has been in their current position. What we mean by "continuous months" is the number of months they've worked in a position, based on their hire date. So, we're talking about **all of the months** in which they've worked in a specific position, NOT just in the measurement year or for a particular season (in the case of seasonal employees).

Continuous months: seasonal

Let me say a little more about the last part of my last statement (the case of seasonal employees).

Continuous months: seasonal

Say you have a seasonal employee - someone who works for you most of the year, but who you don't need during the summer. So, they don't work for you June through August each year. Since this person is considered a regular employee and is scheduled to work for you every year (from September through May), you would count them as having worked 12 continuous months during the year. You would calculate their total number of months dating back to their original hire date for that position.

The same rule applies to individuals who may have the last day of the year (December 31st) off, but are scheduled to return on a specific day. This could be the case for someone out on leave or vacation. Remember, what is important here is that they are considered a regular employee, that they worked for you during the year, are still employed by you, and expected to return on a specific date. The only thing that is different is that they are not present on the last day of the reporting year. You will want to count this employee on Table 5A and include all of their months in their position for the entire reporting year.

Knowledge Check: Continuous Months

Let's see if this makes sense.

Knowledge Check: Continuous Months

Say you had an internist who worked for you for most of the year - she started on January 1st and worked through November 2nd, when she went out on a 3-month maternity leave. Since she is scheduled to return, we know that we'll count her on Table 5A as an internist (Line 9a).

But, how many months should we report for her? 11 or 12?

Click the circle with your response.

Answer: 12

Feedback when correct:

She has been employed as an internist with you for the full 12 months. Even though she is on maternity leave, she is scheduled to return. All of her months should be counted.

Feedback when incorrect:

Although she went out on maternity leave in November, she is scheduled to return; so all of her months for the reporting year should be included.

Table 5A: Totaling

Once you determine the number of months of tenure for a person, you'll need to add them up and report them as one figure for each personnel type.

In other words, if you had **3 full and part-time family physicians**, you would:

1. Determine the number of continuous months that each family physician has been in their current position and add them together.
2. You would then report the total number (or sum) of continuous months on the Family Physician line (Line 1) in column b (for full- and part-time staff) and column d (for other types of staff).

When you're reporting this information for your UDS Report, you will only be able to enter "whole numbers." So, for columns b and d, you'll need to round up to the next whole number before reporting. In other words, if someone worked for you for three weeks in December, and is there on the last day of the reporting year (December 31st), you will report them as having "1 month" of tenure (rounding up from 3 weeks). Similarly, if a staff person started on November 28th and is there on December 31st, you will report them as having 2 months of tenure.

Reporting Tenure

OK, so you seem to understand that when reporting "continuous" months, if the person was continuously employed (or contracted) in their current position, you'll report the number of months since the day they were hired. And that you will count them as part of the "headcount" regardless of whether or not the last day of the year is a regular work day for them. Perfect.

Now let's go over some of the more complicated things that might happen at your health center.

Let's say a person was employed by you more than once, with their employment having ended between the two (or more) periods. What do you do then?

Well, these would be considered separate episodes of employment. So, following the rule for reporting continuous months and only counting the number of months since the hire date for their current position, you would only report the number of months after they were most recently hired. The fact that they worked for you before is irrelevant and is not included in your calculation.

Reporting Tenure

Let's walk through another potentially tricky situation:

In this case, let's say that you have a pediatrician who has worked for you for some time, then starts to also serve as your Medical Director. She hasn't stopped working for you as a pediatrician, she just took on some added responsibilities and accepted the promotion to Medical Director, too.

Well, now this person is serving in two positions, pediatrician and Medical Director. However, the Medical Director position is newer to her than the pediatrician position.

Easy enough. You would count the number of continuous months she served in each position separately, basing each on the hire date for the specific position. So, that might turn out to be something like: 50 months as a pediatrician, and 9 months in her newer position as your Medical Director. The 9 months are actually being counted twice (once in the pediatrician line and once in the Medical Director line) and that duplication is correct.

Reporting Tenure

Another thing that may happen at your health center is that staff may be promoted or move to another position within your organization. Since you will be reporting employees in their positions as of the last day of the year, this should be relatively easy to report on Table 5A, right? You would only need to report the number of months the person has been in their new position.

So, if one of your nurses transitions to a Nurse Practitioner position as of December 1st of the reporting year, you will only need to consider her current position when you prepare your report on Table 5A on December 31st.

Knowledge Check: Tenure

Let me ask you a couple of questions about how you think she should be reported on Table 5A.

Knowledge Check: Tenure

So, if one of your nurses transitions to a Nurse Practitioner position as of December 1st of the reporting year...

How many months should we report for her on Line 9a (Nurse Practitioners)? 12 months, 1 month, or maybe she shouldn't be reported on Line 9a at all?

Click the circle with your response.

Answer: 1 month

Feedback when correct:

That's right! One month. She started on December 1st and remained in that position through December 31st. I'll also add that she should not be included on the Nurse line at all.

Feedback when incorrect:

Sorry, that's incorrect. Remember, you will count the number of continuous months in their current position and round up to the next whole number. So, we would report one month for her on Line 9a. I'll also add that she will not be reported on the Nurse line at all.

Too many or too few months?

Remember we said at the beginning that some health centers report too many months tenure for their staff and others report too few? Let's talk a little more about that since you now know more about how to calculate continuous months of employment.

Too many months?

Though we're not exactly sure why too many months get reported for health center staff, we can guess that it might be that you forgot to take someone out of your figures from last year, or that there was a simple typo or mathematical error. Whatever the case, when it looks like a large proportion of staff have all been employed in their current positions for a very long time, we might ask you about it during the review process.

Obviously, it might be the case for some health centers and for some staff within your health centers to remain employed in their positions for a long time. However, we sometimes see numbers that indicate that a lot (or even most) of the staff have tenure that exceed 40 or 50 years. Again, although this is *possible*, it's not likely to be the case for all staff within an organization. Just be aware that if the numbers seem high or are much higher than what you reported last year, your Reviewer will ask you to double check your numbers to make sure there isn't an error there.

Too few months?

Another thing that sometimes happens is that health centers don't report enough months of tenure for their staff. Sometimes people forget to include all of the months for staff working in a particular position. Remember, we want to hear from you about the longevity of your staff- so how long they've continuously worked in a position at your health center. To do that, you'll need to count not only the months in the reporting year, but the months dating back to their date of hire, even if that means counting months from previous years.

For some tips on how to make calculating and reporting "continuous months" for your health center employees a little easier, click on the DID YOU KNOW icon.

Did You Know: Available Data

Here are a couple of reporting tips that might help you when calculating "continuous months" for your health center employees.

- This information is generally available in your health center's personnel or HR employment records. So, you should not have to go about collecting additional data (other than what you need for regular HR management).
- A good starting point for reporting this information might be your prior year's list/worksheet. If you still have it, simply delete staff who have left and add new staff to come up with the new figure for this reporting year.
- If you have not experienced turnover in a specific area (e.g., CFO) during the year and that person is still employed in the same position as of December 31st, you should be able to simply add 12 months to what you reported in the prior year (assuming you reported accurately last year) and report on the appropriate line.
- You should be able to be complete Table 5A well in advance of your UDS report submission date since: 1) this information should exist in employee/personnel records; and 2) you will be using December 31st as the "census" date (and your report is not due until mid February).

Cross-table considerations

As you may have figured out, Table 5A and 5 are closely related and should be prepared in coordination to make sure the information is consistent across the two tables.

- Remember that though you are reporting staff on both Tables 5 and 5A, exactly **who** gets reported and **how** they are reported are slightly different across the two tables.
- Table 5 is a much more exhaustive list of your health center staff. Table 5A only includes certain clinical staff and key leadership positions.
- Table 5 reflects staff who have worked at your health center at any point **during the reporting year**. Table 5A reflects a head count of employees **as of the last day of the reporting year**. So, the number of staff reported isn't likely to be equal across the two tables.

Why is that important to understand? Well, it means that you might have staff FTEs reported on Table 5 without corresponding persons or months on Table 5A.

How? On Table 5, you'll need to report part-year employment (by FTE), but if an employee worked in the beginning of the reporting year, but is no longer working for you as of the last day of the reporting year, they wouldn't be counted on Table 5A.

- So, it is important for you to check in the reverse order - make sure that all of the staff you are reporting on Table 5A (persons and months) are also reported on Table 5 (FTEs). If they are included as an employee on Table 5A - then they were employed by you during the year and need to have FTEs reported on Table 5.

Look out for these common problems!

Thank you for sticking with me! Before we end, let me leave you with a few helpful reminders that might help save you and your team some time when completing Table 5A.

When completing this table, be sure to:

- Include all regular health center employees working for you as of the last day of the reporting year; if they are no longer working for you, they do not get counted on Table 5A.
- Use data that is readily available to you in your Personnel or Human Resource employment records.
- Report a count of staff persons (not FTEs) in Columns a and c.
- Report months in Columns b and d. Round each partial month up to the next whole number and then add them all together.
- Report persons and months on lines that are consistent with Table 5 and correspond to the work performed and licensure.

Look out for these common problems!

- Remember to calculate continuous months (tenure) based on the employees' date of hire for their current position. Include all of the months since their date of employment, even if that means counting months from a previous year. This number should be a cumulative number for those who remain employed in the same position year after year.
- Let your reviewer know if you experienced a big change in staffing since last year by adding a comment in the EHB.

Congratulations

Congratulations! You've completed the training on Table 5A!

Thank you for taking the time today to learn about this table and for testing your knowledge. We appreciate your efforts to give us the data we need to support you in your important work.

Review

You can review any topic that we just covered by clicking on the hyperlinks in the Table of Contents on the left of your screen, but if you would like to do something else, click the **NEXT** button to see your options.

Please remember to access and download additional training resources by clicking on the RESOURCES LINK in the upper right-hand corner of your screen.

Additional Resources

These resources allow you to access National- and State-level UDS data; and, other reporting resources such as Quick Fact Sheets, training webinars, and the in-person regional training schedule. For ongoing questions, you can also email: UDSHelp330@BPHCDATA.NET or call the UDS Helpline toll-free at 866-UDS-HELP.

Next Steps

Now that you have completed the Table 5A training - what would you like to do next?

- If you would like to return to the UDS Learning Center and choose from a listing of all of the training sessions, you can click on the "Return to the UDS Learning Center" button

OR

- You can also choose to continue to learn more about the very next table that appears in the UDS Report, Table 6A - Selected Diagnoses and Services Rendered. Just click on the "Continue to the next UDS Table" button on this screen to join that session.