



**Department of  
Higher Education**

**John R. Kasich**, Governor  
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**GUIDELINES AND PROCEDURES FOR  
CHOOSE OHIO FIRST – PATIENT-CENTERED MEDICAL HOME (PCMH)  
PROGRAMS**





## **TABLE OF CONTENTS**

### **Purpose of Manual**

#### **Choose Ohio First & Patient Centered Model Home History and Overview**

Primary Care Definition

Participating Institutions

*PCMH Medical (ORC 3333.611)*

*PCMH Nursing (ORC 3333.612)*

### **Policies and Procedures**

Scholar Eligibility Requirements

*PCMH Medical*

*PCMH Nursing*

Disbursement of Scholar Awards

Repayment of Scholar Default

Program Leadership

*The Program Coordinator*

*The Financial Aid Coordinator:*

### **PCMH Funding**

Requirements

Reimbursement Requests and Recordkeeping

Return of Funds

Data Collection

*Data Reporters*

*Data Collection Template*

Ongoing Monitoring and Review

Annual Reporting

### **Scholar Support**

Student Support Services

### **Appendix**

Links to Related Documents and Sites



## **PURPOSE OF THE MANUAL**

The purpose of this manual is to provide institutions of higher education with guidelines and procedures for the PCMH unit of the Choose Ohio First Scholarship Program. This manual describes the minimum requirements to ensure that participating institutions meet basic standards of program quality. The manual also describes the conditions requiring approval and the associated processes used to determine continued eligibility for offering PCMH funds.

## **CHOOSE OHIO FIRST & PCMH HISTORY AND OVERVIEW**

Choose Ohio First began in 2008 as a way to increase the number of Ohio students entering into and successfully completing science, technology, engineering, math or medicine (STEMM) majors at Ohio's public and private colleges and universities. Details of the general COF program are outlined in the following sections of Ohio Revised Code: 3333.61 to 3333.69.

In 2010, House Bill 198 of the 128<sup>th</sup> General Assembly was created to address the shortage of primary care professionals within the state of Ohio. One component of the bill was provision for medical and nursing schools in Ohio to offer scholarships to students committed to entering the primary care field within Ohio. The bill became finalized in Ohio Revised Code under the umbrella of COF (3333.611 and 3333.612) and shortly afterward proposals were submitted from the medical and nursing schools outlining details of this scholarship program.

The scholarship program is focused upon a particular model of primary care called Patient Centered Medical Home (PCMH). A Patient Centered Medical Home is "a medical office or clinic that offers coordinated, comprehensive primary care that is personal and focused on making sure the patient's healthcare needs are met." Participating medical and nursing schools utilize PCMH curriculum as part of their training: <http://www.odh.ohio.gov/landing/medicalhomes/pcmh.aspx>

### **Primary Care Definition**

Per consultation with the Ohio Patient Centered Primary Care Collaborative Workforce Learning Center, the following definition of Primary Care was accepted by the Chancellor on 4/22/16: "Primary care should include a specialist in family medicine, general internal medicine, general pediatrics, or geriatrics who provides care to the patient at the point of first contact, and takes continuing responsibility for providing the patient's comprehensive and coordinated care in the context of family and community."

### **Participating Institutions**

#### *PCMH Medical (ORC 3333.611)*

- Case Western Reserve University
- Northeast Ohio Medical University
- Ohio State University
- Ohio University
- University of Cincinnati
- University of Toledo
- Wright State University



*PCMH Nursing (ORC 3333.612)*

- Kent State University
- Ohio University
- University of Akron
- University of Toledo
- Wright State University

**POLICIES AND PROCEDURES**

**Scholar Eligibility Requirements**

*PCMH Medical*

- Have completed at least one year of medical school
- Be an Ohio resident at the time the scholarship is granted
- Have evidence of a pattern of community service and commitment to primary care
- Remain a student in good academic standing
- Complete a residency in family medicine, general internal medicine, general pediatrics, or geriatrics\*
- Commit to primary care practice in Ohio for no less than three years immediately after completion of residency
- Must accept Medicaid recipients while in practice

\*Geriatrics is an approved fellowship following an applicable residency.

*PCMH Nursing*

- Be an Ohio resident at the time the scholarship is granted
- Have evidence of a pattern of community service and commitment to primary care
- Participate in identified patient centered medical home model training opportunities during nursing school
- Remain a student in good academic standing
- Specialize in family medicine, general internal medicine, general pediatrics, or geriatrics
- Commit to primary care practice in Ohio for no less than three years immediately following completion of nursing school
- Must accept Medicaid recipients while in practice

The campus will monitor the academic progress of the student. The academic progress of the student will be described in the annual report each campus must submit and in the term-based requests for payment each campus submits. The submission affirms the student enrollment and progress towards completion. Each year for the three year obligatory service period, the PCMH graduate should submit a statement to the program director on the campus (or the designee in the financial aid or admissions office) affirming their current involvement with primary care in Ohio. This statement will include their name, address, and current contact information, as well as their practice name and contact information. The information from the student can be confirmed by workforce data through the Department of Taxation. Eligibility can also be confirmed through the Ohio Department of Health's match list for practice name, Medicaid/Medicare population, and the uninsured population. Campuses will verify the student's progress toward completing their service commitment in the annual report.



### **Disbursement of Scholar Awards**

PCMH Scholarships are awarded to eligible students by the colleges and universities, and are reflected on the student's tuition bill or statement. The Ohio Department of Higher Education provides reimbursement to institutions at the end of each academic term for PCMH scholars, provided eligibility requirements are met.

### **Repayment in Event of Scholar Default**

Failure to remain in a primary care discipline as outlined will result in any portion of the award the student has received becoming a debt owed and payable upon demand.

If a PCMH scholar is in one of the following situations, repayment will be required to ODHE:

- Pursues a discipline outside of family medicine, internal medicine, general pediatrics, or geriatrics
- Fails to complete medical or nursing school
- Commits less than three years of primary care service in the State of Ohio

If a scholar defaults according to one of the above criteria, the institution must notify ODHE within 90 days of the defaulting action. ODHE will work with institution to identify total amount awarded to scholar, and ODHE will send an invoice to the institution for this amount. The institution must repay the entire amount of the scholarship to ODHE within 90 days of receipt of the invoice unless otherwise agreed upon. The institution should work directly with the scholar to collect the debt and interest collected by the institution school can be used to offset costs.

Institutions are responsible for the scholar's understanding of program and repayment. It is recommended to provide a renewable promissory note or forgivable loan agreement with the following but not limited provisions:

- Description of scholarship program
- Maximum scholarship amount per year
- Maximum years of eligibility for scholarship
- Forbearance of six months following completion of curriculum
- Eligibility for scholarship as detailed in Article II: Scope of Work of institution's award agreement with ODHE.
- Repayment policy as detailed in Article IV: Repayment of institution's award agreement with ODHE.
- Percentage rate of interest as determined and collected by the institution
- Annual reporting requirements of scholar

### **Program Leadership**

Each participating institution should identify two institutional points of contact for the PCMH Program:

- A Program Coordinator
- A Financial Aid Coordinator

Institutions must provide all relevant contact information to the state. All changes to these contacts must be requested in writing to the state. Other individuals may be listed as departmental contacts for scholars



as it relates to specific program requirements; however, the program director or program coordinator and the financial aid coordinator will be the primary contacts between state leadership at the Ohio Department of Higher Education and the institution.

### *The Program Coordinator:*

- Serves as the point of contact between the state and the institution
- Serves as the primary point of contact for student inquiries
- May be appointed by the Provost, Chief Academic Officer, or other campus official (e.g., Dean, Program Chair, etc.)
- Serves as the administrative contact for all communications, questions, data requests and concerns
- Agrees to disseminate information to other individuals on the campus as necessary and collect data from other individuals as required
- Monitors funding levels
- Coordinates scholar application process
- Establishes an institutional review committee for the scholar application process
- Provides oversight for report submissions and other requirements
- Submits GPA support plans to ODHE for scholars with GPA under 3.0
- Ensures that information from the state level is disseminated to the appropriate contacts on campus (i.e., faculty, scholars, staff, etc.)
  - Establishes clear articulation of the degree programs receiving the Choose Ohio First funds and the degree levels eligible for the scholarship, which include:
    - PCMH Medical – Medical Degree (MD)
    - PCMH Nursing – Advanced Practice Degrees (MA, FNP, DNP)
- Maintains program clarity by following Choose Ohio First marketing and branding standards, found here: <https://www.ohiohighered.org/cof/resources>
- Reports defaulting scholars to ODHE and coordinates repayment
- Stays apprised of any financial or programmatic changes through the PCMH Medical and Nursing Guidance Memos, distributed annually through ODHE's financial aid office

### *The Financial Aid Coordinator:*

- Monitors funding levels
- Monitors payment requests for eligibility (award #, degree level, CIP code, GPA)
- Submits scholar payment requests into the COF Payment and Tracking system
- Communicates with program director regarding eligibility issues and GPA support plans
- Stays apprised of any financial or programmatic changes through the PCMH Medical and Nursing Guidance Memos, distributed annually through ODHE's financial aid office

## PCMH FUNDING

### Requirements

Campuses that seek to award PCMH Scholarships must:

- Ensure that recipients of the PCMH scholarship meet the Ohio residency requirement as outlined in OAC 3333-1-10. Forever Buckeye students (students recruited back to the state) are eligible for PCMH funds.



- Ensure that scholars meet the eligibility criteria outlined in ORC, are committed to primary care, are aware of the three-year service commitment, and are aware of the circumstances leading to default and repayment.
- Ensure that, in the event of a student default, ODHE is paid within 90 days of receipt of an invoice for the scholar in question.
- Adhere to funding allocation limits that will be made available to campuses on or after July 1st of each fiscal year.
- Award Scholars in approved disciplines on the campus.
- Award each scholar up to the maximum award amount allowed
  - PCMH Medical - \$30,000 per year for up to four years
  - PCMH Nursing - \$10,000 per year for up to three years
- Continued funding of Choose Ohio First Scholarships will be contingent upon campus performance in the following areas:
  - Retention/COF Cohort Data
  - Completion
  - Campus Data Reporting
  - Campus Commitment

### **Reimbursement Requests and Recordkeeping**

The Choose Ohio First institution must submit reimbursement requests at the end of the semester/term that the student is enrolled. Fall payments must be requested at the end of the Fall semester. Spring payments must be requested at the end of Spring semester. Institutions must request summer payments at the conclusion of the Summer semester. Reimbursement requests received after the academic term without prior notification to the Director will be paid as funding allows and may be rejected.

**Reimbursement requests for past fiscal or academic years will not be accepted.**

Reimbursement requests for individual scholars made after the larger request may be delayed. Payments to campuses are made in a lump sum and payment for several COF programs may be released in the same disbursement. The Choose Ohio First institution must maintain records of all recipients of the award. This must include a roster of all students from all years of the program, including student information, demographic information, and graduation date.

### **Return of Funds**

There may be instances where an overpayment occurs and the campus must return the funds to the Ohio Department of Higher Education. It is hoped that these funds could be applied to a student account in a subsequent term and deducted from future requests. However if that cannot be done, the campus will notify the Director of the amount and reason for the overpayment, make any adjustment in the data system for the affected student(s), and will submit a check to ODHE for deposit in the GRF account. The Director will log the repayment, making note of the campus, amount, and affected student(s) for recordkeeping at ODHE. The check is submitted to Fiscal with a refund transmittal form that is signed by the fiscal department. Excessive requests resulting in overpayment may result in a mandatory training/coaching for the affected campus.





- 1) The **SSN is required**; eventually the Student ID column will be removed, but must remain for now. Submissions without the SSN will not be accepted. Fill in the SSN column and leave the Student ID column blank – **DO NOT DELETE THE STUDENT ID COLUMN**.
- 2) GPA is required. The GPA should be the ending GPA for the term you are uploading. Placeholder GPAs (e.g., 0.00) are not acceptable. The submission window opens at the end of the semester, so the GPA should be an accurate representation of the term. For campuses that do not calculate GPAs, please list the “hidden GPA” as ODHE has a 3.0 GPA benchmark. If a scholar falls below a 3.0, please include a scholar support plan.
- 3) Excessive use of “U” or “UK” (Unknown) for Gender or Race is not acceptable. Whenever possible, try to capture this information from the application or other sources on campus.

Data for public institutions is made available through the Higher Education Information System (HEI). Ohio private and independent institutions must submit data as requested to continue offering Choose Ohio First Scholarships. Data requests will be similar to submissions made to the Integrated Postsecondary Education Data System (IPEDS), including STEM enrollment, graduation rates, etc.

### Ongoing Monitoring and Review

Campuses should adhere to their institutional monitoring plan, as outlined in their scope of work. Basic internal monitoring will include review of majors and other requirements of funded students, verification of submission prior to uploading to the reporting system, and a continuous improvement plan. Assessments must be used to inform continuous performance improvement of the PCMH Program. When possible, program assessment that compares PCMH scholar performance to non-PCMH students is encouraged. Results should be communicated regularly to scholars and others as necessary (e.g., faculty, advisors, campus leadership, etc.). Surveys administered to scholars may be used to measure program satisfaction and results should be communicated through the Annual Report. PCMH campuses are subject to ongoing monitoring and review of the status of PCMH, including desk reviews and/or site visits conducted by the Director.

### Annual Reporting

An Annual Report on the status and progress of the PCMH program is due from each campus **no later than August 10 of each funded program year**, and for up to three additional years of monitoring if/when funding ends. Collection of data and impact must continue for the Choose Ohio First students following graduation to obtain information on residency and/or service commitment.

The Annual Report online form and narrative templates may be found here:

<https://www.ohiohighered.org/cof/pcmh>. Annual Report submissions are integral to the compilation of the overall statewide report due to the state legislature in fall.

## SCHOLAR SUPPORT

### Student Support Services

The PCMH program provides awareness and access to academic services meant to positively impact student performance. When possible, these services should be available exclusively for PCMH scholars. Any service provided should align with the goals of the PCMH program, and serve as a means of increasing completion. The institution may provide or have access to student academic support services including but not limited to the following:

## **GUIDELINES AND PROCEDURES FOR COF-PCMH**

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- Student advising related to the successful completion of degree program
- Academic support for students with disabilities and other learning needs
- Physical or mental health counseling and/or external referrals
- Environmental support on-site or through external referrals if applicable to the demographic makeup of PCMH scholar population (e.g., for transportation, child care, personal finance).
- Career counseling
- Tutoring and academic enrichment services



**APPENDIX**

**Links to Related Documents and Sites**

**Ohio Revised Code**

Chapter 3333	Ohio Board of Regents <a href="http://codes.ohio.gov/orc/3333">http://codes.ohio.gov/orc/3333</a>
Chapter 3333.60	Ohio innovation partnership definitions <a href="http://codes.ohio.gov/orc/3333.60">http://codes.ohio.gov/orc/3333.60</a>
Chapter 3333.611	Primary care medical student component of the choose Ohio first scholarship program <a href="http://codes.ohio.gov/orc/3333.611">http://codes.ohio.gov/orc/3333.611</a>
Chapter 3333.612	Primary care nursing student component of the choose Ohio first scholarship program <a href="http://codes.ohio.gov/orc/3333.612">http://codes.ohio.gov/orc/3333.612</a>
Chapter 3333.62	Competitive process for program awards <a href="http://codes.ohio.gov/orc/3333.62">http://codes.ohio.gov/orc/3333.62</a>
Chapter 3333.69	Monitor of initiatives for which award granted <a href="http://codes.ohio.gov/orc/3333.69">http://codes.ohio.gov/orc/3333.69</a>

**Ohio Administrative Code**

3333-1-10	Ohio student residency for state subsidy and tuition <a href="http://codes.ohio.gov/oac/3333-1-10">http://codes.ohio.gov/oac/3333-1-10</a>
3333-1-61.2	Objectives to be reflected <a href="http://codes.ohio.gov/oac/3333-1-61.2">http://codes.ohio.gov/oac/3333-1-61.2</a>

**Other Documents and Sites**

- Choose Ohio First programs and webpage – [www.chooseohiofirst.org](http://www.chooseohiofirst.org)
- Forever Buckeye - [http://www.ohiohighered.org/files/uploads/Forever\\_Buckeyes\\_FAQs.pdf](http://www.ohiohighered.org/files/uploads/Forever_Buckeyes_FAQs.pdf)
- Site Visit/Desk Review Schedule & documents - <https://www.ohiohighered.org/node/313>
- Choose Ohio First Data upload site - <https://chooseohiofirst.ohiohighered.org>
- Family Educational Rights and Privacy Act Regulations (FERPA) 34 CFR Part 99 - <http://www2.ed.gov/policy/gen/reg/ferpa/index.html>