



Medical Education & Research Cost (MERC) Grant Program

APPLICATION INSTRUCTIONS - Minnesota Clinical Training Sites
Fiscal Year 2023 Clinical Training

Minnesota Department of Health
PO Box 64975
St. Paul, MN 55164-0882
(651)-201-3566
health.merc@state.mn.us
<https://www.health.state.mn.us/facilities/ruralhealth/merc/index.html>

08/07/2024

To obtain this information in a different format, call: 651-201-3838.

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MERC Application Instructions

Overview

General Information

Grant Title:	Medical Education and Research Cost (MERC) Grant
Program Website:	https://www.health.state.mn.us/facilities/ruralhealth/merc/index.html
Application Portal:	https://merc.web.health.state.mn.us
Application Deadline:	September 30, 2024

What's New in the Application Portal

Additional data to assist with the administration of the new [Site-Based Clinical Training \(SBCT\) Grant](#) will be collected in the MERC portal due to the close alignment to the MERC Grant. The SBCT Grant provides funding to clinical training sites that meet the eligibility criteria outlined in [Minnesota Statutes 144.1508](#). Review the [SBCT Grant webpage](#) for additional information and eligibility.

Within the application portal, Minnesota Clinical Training Sites can apply for the MERC Grant, SBCT Grant, or both.

Sites applying **solely** for the [SBCT Grant](#) that are **not enrolled** as a [Minnesota Health Care Program \(MHCP\)](#) facility that offer sliding fee services must contact ClinicalTraining.MDH@state.mn.us to determine if additional technical assistance may be required. Provide the site's legal name, address where training occurred, [NPI](#), and type of facility.

Program Description

[Minnesota Statute 62J.692](#) authorizes the Commission of Health to award grants to support clinical medical education. The MERC grant was established in 1996 and funded for the first time in 1997. Its purpose is to provide support for certain medical education activities in Minnesota that historically were supported in significant part by patient care revenues. Due to Minnesota's competitive health care market, payers became increasingly unwilling to pay the extra costs associated with the purchase of services at teaching facilities. Teaching facilities are forced to compete with non-teaching facilities, which results in greater difficulty in funding teaching activities. The Commissioner of Health has been responsible for administering the MERC grant since 1998.

Legislative Impact

During the 2023 legislative session, several changes took place. These changes were enacted during the previous grant cycle.

1. Rural health clinics and federally qualified health centers will no longer apply through the MERC program.
 - Medical education costs incurred by rural health clinics or federally qualified health centers are considered allowable costs and are recognized in the Department of Human Services (DHS) rate settings. The Department of Human Services (DHS) will work directly with these training facilities.

MERC Application Instructions

2. Sites may now include clinical training hours in settings outside of the hospital or clinic site, as applicable, including school, home, or community settings.
 - The training must occur as part of, or under the scope of, either an inpatient or ambulatory patient care setting where the training is funded, in part, by patient care revenues.
 - The setting cannot otherwise be eligible for or enrolled as a Medicaid site.
 - When the training is outside the hospital or clinic, a separate application must be completed if the site can be or is enrolled in the Minnesota Health Care Program (MHCP).
 - Satellite clinics and other facilities are separate applicants.
3. Distribution and funding:
 - Tobacco Funds/Match: No changes.
 - General Fund/Health Care Access Fund/Other Medical Education Funding (not requiring federal approval) : Eligibility change.
 - Hospitals or sites affiliated with a hospital system are excluded.
 - Medical education funding previously carved-out from the Prepaid Medical Assistance Program and transferred to the MERC program for distribution is now be distributed by the Department of Human Services (DHS).
 - Sites qualifying for a MERC distribution who are defined as hospitals or sites affiliated with a hospital system may receive a medical education component in the hospital's FFS rates.
 - DHS will determine the medical education component using the clinical training site's MERC grant determination.

Eligible Applicants

Applicant Summary

The application portal consists of three separate organizational roles. Each applicant type is defined below:

- Minnesota Clinical Training Site
 - Where the students/residents gain clinical training experience in an inpatient or ambulatory patient care setting in Minnesota. A clinical training site is the Minnesota Health Care Program (MHCP) enrolled practice where training occurred.
- Minnesota Teaching Program
 - Accredited Minnesota teaching program at a Minnesota institution that enrolls trainees and is responsible for the trainee's overall education. Teaching program coordinates clinical training for their enrolled students/residents at clinical training locations.
- Minnesota Sponsoring Institution
 - A hospital, school, or consortium located in Minnesota that sponsors and maintains primary organizational and financial responsibility for a clinical medical education program in Minnesota and which is accountable to the accrediting body.

MERC Application Instructions

Applicant Detail

Minnesota Clinical Training Site

Clinical training site who hosted eligible trainees from an accredited medical education program sponsored by a Minnesota sponsoring institution.

- “Training Site” is a facility at a given practice address where clinical training occurred.
 - Training site must be in Minnesota.
 - Clinical training must be funded in part by patient care revenue and occurs as part of or under the scope of either an inpatient or ambulatory patient care training site.
 - If the training site is a physician owned clinic, the training site is defined as the clinic and not the physician.
 - Individual preceptors or departments within a facility should not be listed as an applicant.
 - Indicate the facility where clinical training occurred.
 - Training that occurs in a nursing facility (or a hospital swing bed unit), rural health clinic, or federally qualified health center are *not* eligible.
- Training site must be actively enrolled in the Minnesota Health Care Program (MHCP) and have a National Provider Identification (NPI) Number.
- Training site must have Minnesota public program reimbursement revenue on record with the Minnesota Department of Human Services during CY2023 from Medical Assistance/Prepaid Medical Assistance (MA/PMAP).
- Training site provided clinical training to a minimum of 0.10 eligible FTE trainees (208 hours) in fiscal year 2023.
 - Trainee total is comprised of overall MERC eligible sponsoring institutions, accredited teaching programs, and provider types.
 - “Eligible trainee FTE's means the number of trainees, as measured by full-time equivalent counts, that are at training sites located in Minnesota with currently active medical assistance enrollment status and a National Provider Identification (NPI) number where training occurs as part of or under the scope of either an inpatient or ambulatory patient care setting and where the training is funded, in part, by patient care revenues. Training that occurs in nursing facility settings, rural health clinics, or federally qualified health centers is not eligible for funding under this section.” Minnesota Statute 62J.692, Subdivision 1 (h).
 - Includes clinical training hours in settings outside of the hospital or clinic site, as applicable, including school, home, and community settings.
 - If the setting is eligible for or is enrolled as a Medicaid site, a separate application must be completed. (Satellite clinics or other facilities are separate applicants.)
- The use of funds is limited to expenses related to clinical training program costs for eligible programs.
 - Training site must incur a minimum of \$5,000 in clinical training expenditures related to the eligible trainees.

MERC Application Instructions

Minnesota Teaching Program

“Clinical medical education program means the accredited clinical training of physicians (medical students and residents), doctor of pharmacy practitioners (pharmacy students and residents), doctors of chiropractic, dentists (dental students and residents), advanced practice nurses* (clinical nurse specialists, certified registered nurse anesthetists, nurse practitioners, and certified nurse midwives), physician assistants, dental therapists and advanced dental therapists, psychologists, clinical social workers, community paramedics, and community health workers.” Minnesota Statute 62J.692, subdivision 1(d).

- The program must be accredited by an organization recognized by the Department of Education, the Centers for Medicare and Medicaid Services, or another national body that reviews the accrediting organizations for multiple disciplines and whose standards for recognizing accrediting organizations are reviewed and approved by the commissioner of health.
- Accreditation is required to be in place both at the time of training and ongoing.
- Program must be in Minnesota.
- The program had students/residents that were in clinical training that was funded in part by patient care revenues and occurred in either an inpatient or ambulatory patient care training site during fiscal year 2023.

***Training programs for Advanced Practice Nursing must be “sponsored by the University of Minnesota Academic Health Center, the Mayo Foundation, or institutions that are part of the Minnesota State Colleges and Universities System or members of the Minnesota Private College Council.” Minnesota Statute 62J.692, Subdivision 3(b).**

Minnesota Sponsoring Institution

“Sponsoring institution means a hospital, school, or consortium located in Minnesota that sponsors and maintains primary organizational and financial responsibility for a clinical medical education program in Minnesota and which is accountable to the accrediting body.” Minnesota Statute 62J.692, subdivision 1(e).

Reporting Period

Except for names and addresses, the grant application must reflect clinical training during fiscal year 2023.

MERC Application Instructions

Funding

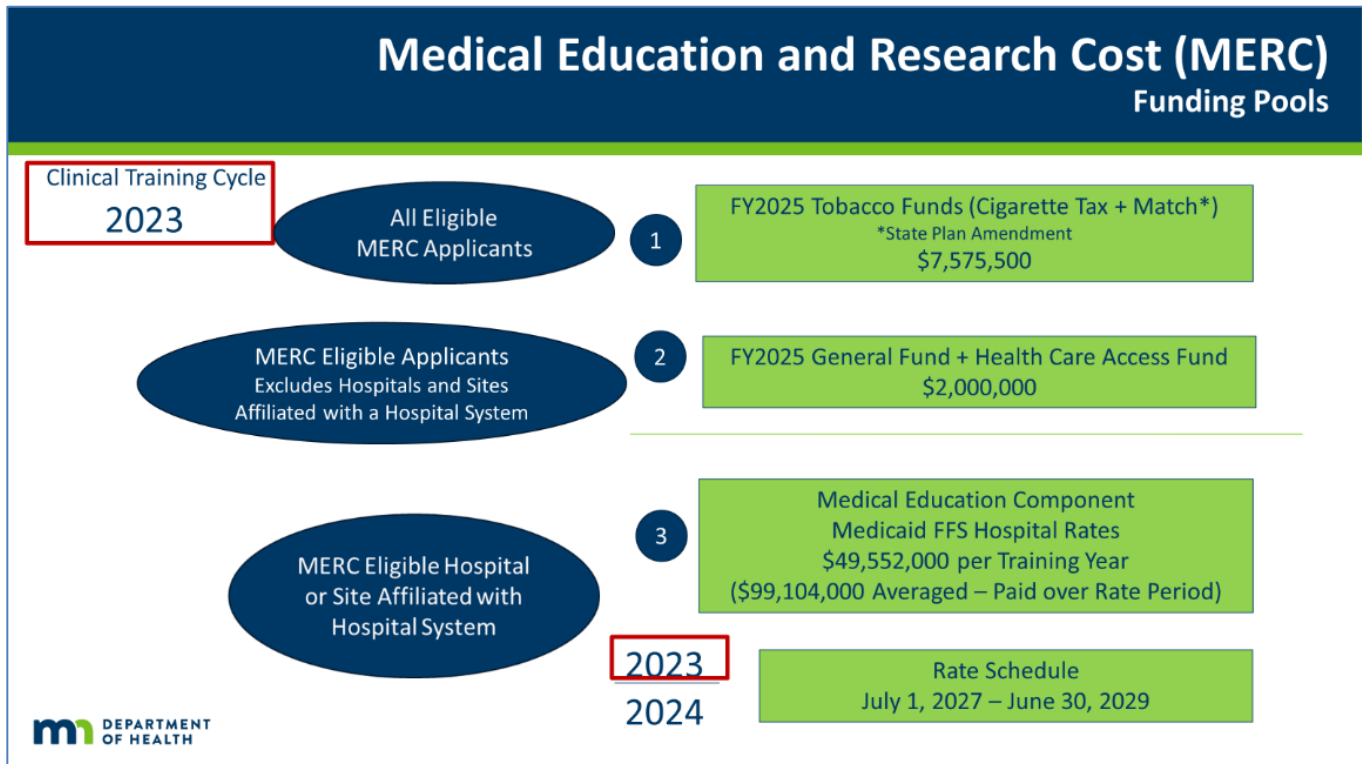
The Minnesota Legislature has appropriated funding in state fiscal year 2025 through multiple sources: an appropriation from Minnesota cigarette tax and matching funds, the general fund, and the health care access fund.

Table 1

MERC Funding	Estimate
Cigarette Tax/Match	\$7,575,500
General Fund	\$1,000,000
Health Care Access Fund	\$1,000,000
Estimated Number of Awards	Unknown – Formula Grant
Estimated Award Maximum	Unknown – Formula Grant
Estimated Award Minimum	\$5,000 Minimum – *Meeting Formula

If eligible for the MERC program, hospitals and sites affiliated with a hospital system may qualify for a medical education rate factor through the Department of Human Services (DHS) FFS rates.

Figure 1



MERC Application Instructions

Application Deadline

Clinical training sites have a two-step process for applying. Both **must** be submitted no later than **4:30 p.m. Central Time on the respective due date.**

Step One – Initial Application

- **Opens: September 1, 2024.**
- **Due: September 30, 2024.**
 - Using the clinical trainee data provided by the teaching program, the training site will identify the practice location and facility type where training took place and the sponsoring institution(s)/teaching program(s) associated with the trainees.
 - The site's application will link to the corresponding teaching program(s) upon submission.
 - The sponsoring institution(s)/teaching program(s) must then approve the application for submission to MDH.
 - Step-by-step instructions (including screen examples) are included in the following pages.

Sites who fail to submit Step One by 4:30 p.m. Central Time on September 30, 2024, will not be considered.

Step Two – Expenditure Reporting for MERC Applicants

- **Opens: November 15, 2024**
- **Due: December 15, 2024**
 - Clinical training expenditures must be provided for the trainees included in the initial application.
 - Expenditures are used in the grant formula.
 - Instructions (including screen examples) are available on the MERC [website](#) under Step Two.

Sites who fail to submit Step Two by 4:30 p.m. Central Time on December 15, 2024, will be disqualified.

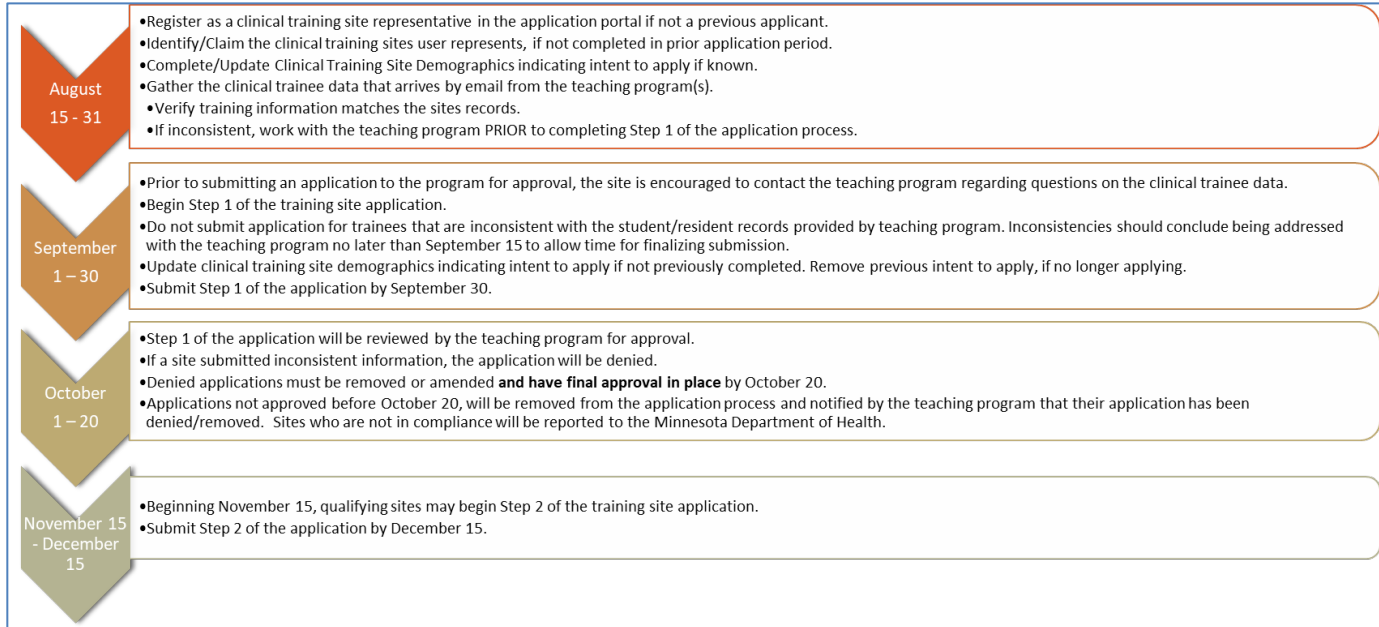
Late applications will not be accepted. It is the applicant's sole responsibility to allow sufficient time to address all potential delays caused by any reason whatsoever. MDH strongly suggests that applicants' complete requirements a **minimum of three calendar days before the deadlines** to allow for any unforeseen circumstances. MDH will not be responsible for delays caused by notification, computer, or technology problems. This extends to the submission of information between the clinical training sites and their teaching programs and sponsoring institutions.

MERC Application Instructions

Application Timeline

The submission [timeline](#) below can also be found on the MERC [website](#).

Figure 2



- Registration - Pre-Application Opens August 15, 2024
 - Demographics
- Step One - Initial Application Opens September 1, 2024
 - **Step One – Initial Application Deadline** **September 30, 2024**

After the application is submitted to the teaching program, it's the applicant's responsibility to review their [application status](#) within the application portal.

- Verify Submission to the Teaching Program September 30, 2024
- Verify Approval by the Teaching Program October 15, 2024
- Verify Submission by the Sponsor October 31, 2024

- Step Two - Expenditure Reporting Opens November 15, 2024
 - **Step Two – Expenditure Reporting Deadline** **December 15, 2024**

- Grant Announcement April 30, 2025 (or before)
 - Eligible sites receive funding from sponsor 60-days after announcement (or before)

- Grant Verification Report (GVR) Opens May 15, 2025 (or before)
 - **GVR Deadline** (selected sites) **July 15, 2025 (or before)**
 - Cycle/Portal Closed July 30, 2025

MERC Application Instructions

Workflow

Figure 3

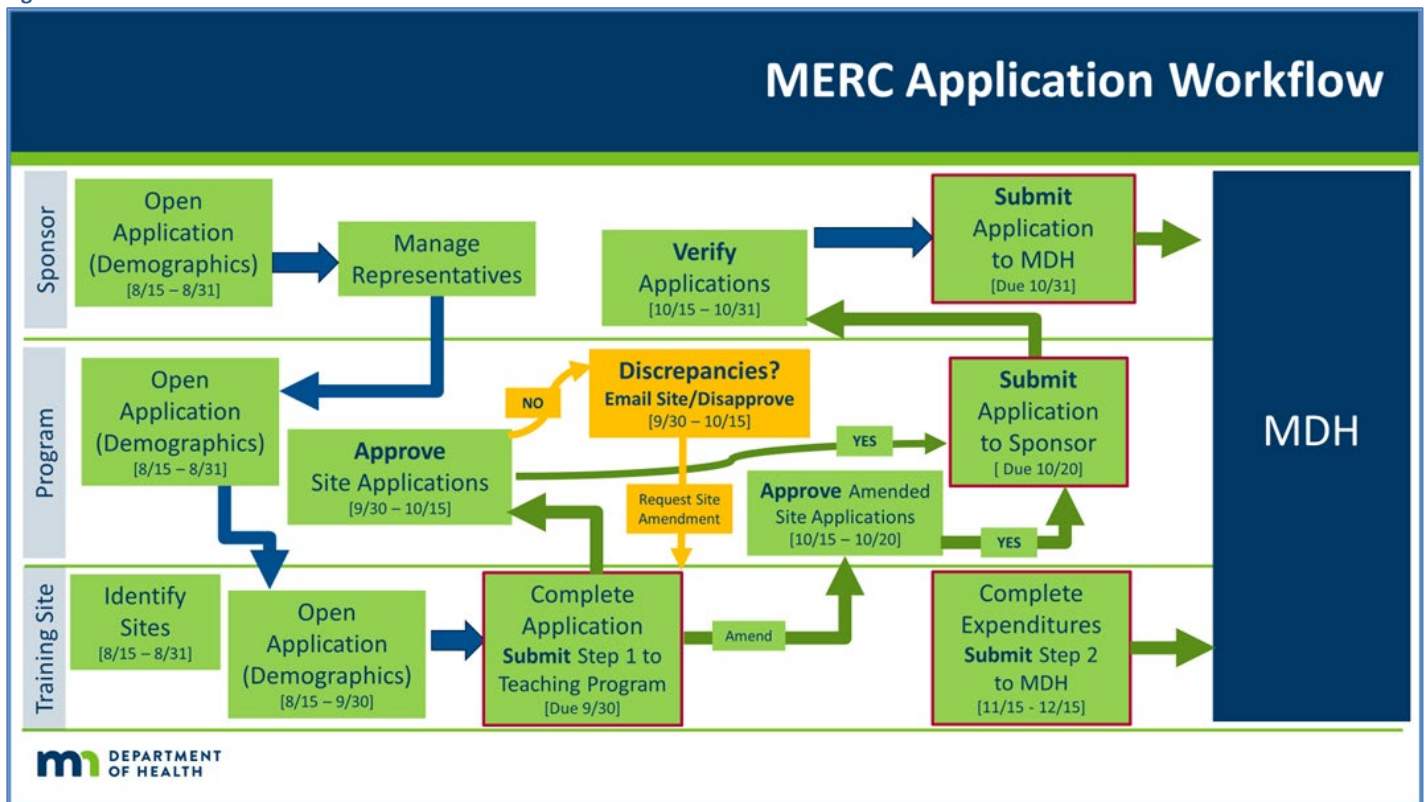
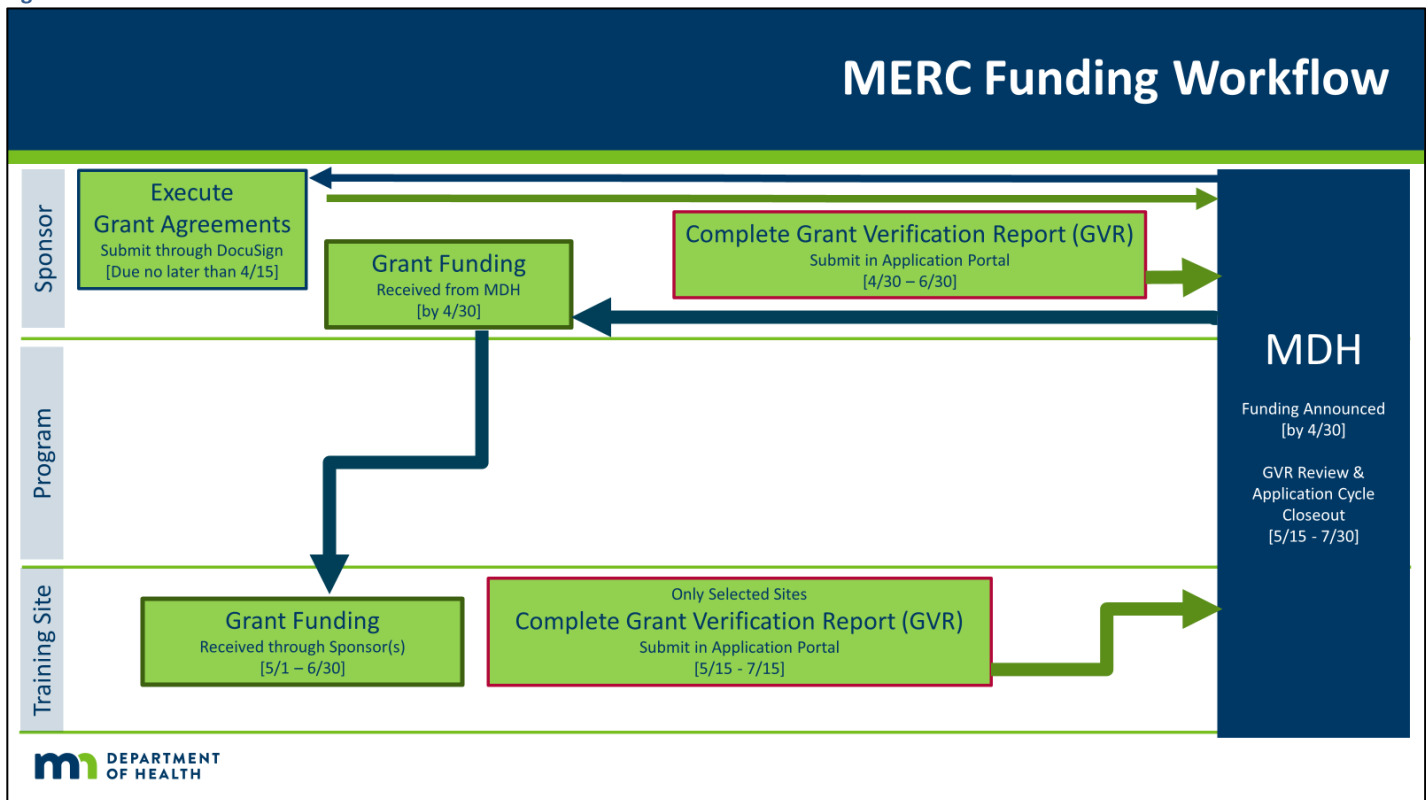


Figure 4

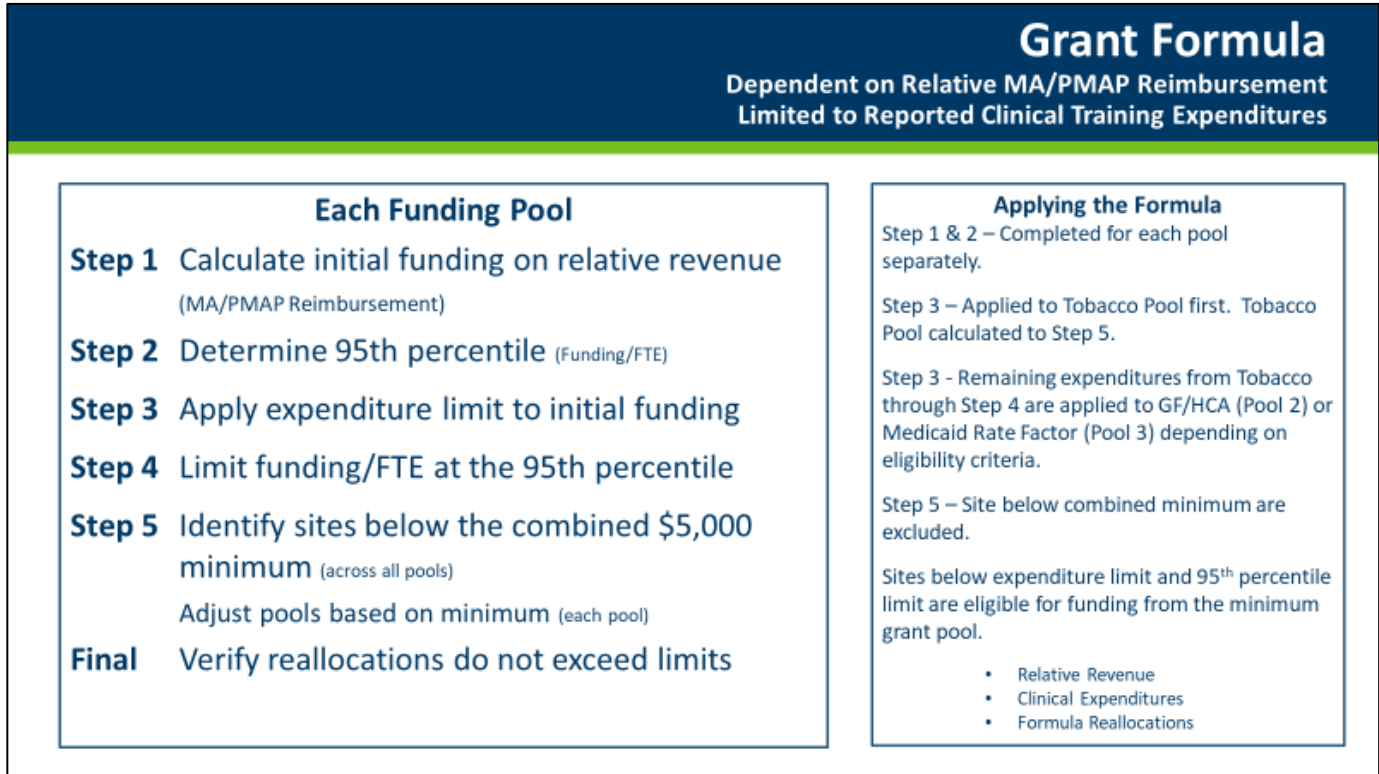


MERC Application Instructions

Grant Determination

Grants are determined based on the eligibility criteria and the [formula](#) found in [Minnesota Statute 62J.692](#).

Figure 5



Grant Announcement

By April 30, 2025, MERC funding will be announced to subscribers of [GovDelivery](#) (see [Communication](#) regarding signup).

- After the announcement, clinical training site representatives can review expected funding in the [Grant Verification Report \(GVR\)](#) and Excel [report](#) available in the [application portal](#). General reporting will also be posted on the MERC website under [publications](#).
- Eligible sites will receive funding from their sponsoring institutions within 60-days of the grant announcement and no later than June 30, 2025.
 - Selected clinical training sites must submit a Grant Verification Report and a system generated accounting report or statement showing receipt of funding from the sponsors.

MERC Application Instructions

Questions & Communication

Submit questions in writing no later than **4:30 p.m. Central Standard Time (CST), on September 25, 2024**. Identify the Application ID Number and Clinical Training Site Name in all correspondence.

MERC Program health.merc@state.mn.us
(651)-201-3566

Site-Based Clinical Training (SBCT) Program ClinicalTraining.MDH@state.mn.us
(651)-201-5905

Subscribe to [GovDelivery](#) to receive MERC notifications and announcements.

Quick References

- [Grant Information](#)
- [Committee](#)
- [Definitions](#)
- [History](#)
- [Legislation](#)
- [Publications](#)

- New Representatives or Email Change
 - [Register](#) for account in the portal.
 - Update [User Profile](#)
- Completing an Application
 - [Identifying New Applicants](#)
 - [Clinical Training Site Demographics](#)
 - [Clinical Training Site Application](#)
- Reports
 - [Training Site Reports](#)
 - [Grant Verification Reports](#)

MERC Application Instructions

Step One: Minnesota Clinical Training Site Application Instructions

Where the students/residents gain clinical training experience in an inpatient or ambulatory patient care setting in Minnesota. A clinical training site is the Minnesota Health Care Program (MHCP) enrolled practice address where training occurred.

The Minnesota Clinical Training Site role will be covered in the instructions that follow.

The grant application is completed electronically through an online portal available at <https://merc.web.health.state.mn.us>.

- It is recommended that users do not use their web browser autocomplete function for completing names and addresses in the application.
- All data submitted for the current application cycle should reflect clinical training in fiscal year 2023.
 - Step-by step instructions and examples of the application screens are for reference only.

Collecting Clinical Trainee Data

Prior to beginning the application, training sites that hosted FY2023 clinical trainees will receive an email from the accredited teaching program that had students/residents in clinical training activities at the training site. The email should arrive by August 31, 2024. It should contain data that must be entered and submitted as part of the training site's overall application. Any inconsistency with trainee information must be address with the teaching program prior to submission of the application to avoid the application's denial.

At a minimum, the trainee data provided by the teaching program will include:

- Training site name and address where training occurred.
- Type of trainee (provider type)
 - Advanced Dental Therapists, Advanced Practice Nurses, Chiropractic Students, Clinical Social Workers, Community Health Workers, Community Paramedics, Dental Residents, Dental Students, Dental Therapists, Medical Residents, Medical Students, PharmD Residents, PharmD Students, Physician Assistants, or Psychologists.
- Sponsoring institution name.
- Teaching program name and contact information.
- Trainee setting (Inpatient, Ambulatory, or Both).
- Clinical trainee FTE count.
 - Clinical training hours/2,080 hours = Full Time Equivalent (FTE) Trainee Count
- Dates the clinical trainees were at the site.

$((\text{Student/Resident} \times \text{Weeks in Rotation}) \times \text{Hours per Week}) = \text{Clinical Training Hours}$

$\text{Clinical Training Hours} / 2,080 = \text{FTE Count}$

FTE = 2,080 hours, 52 weeks, or 260 days.

One person cannot exceed one FTE. FTEs are truncated to four decimals. FTEs should not be rounded.

FTEs on the site's application must match teaching program records.

MERC Application Instructions

Accessing the Application Portal

- In the black menu bar at the top of each page, users will find quick links.
- Just below the black menu bar, links to previous pages are available for navigation.
- Sign in to begin.
 - [Medical Education and Research Cost \(MERC\) Grant Application](#)

Figure 6



1. Grant instructions and program information can be found using the link on the Home Screen.
2. To begin the [application](#) process, click sign-in on the top menu bar.

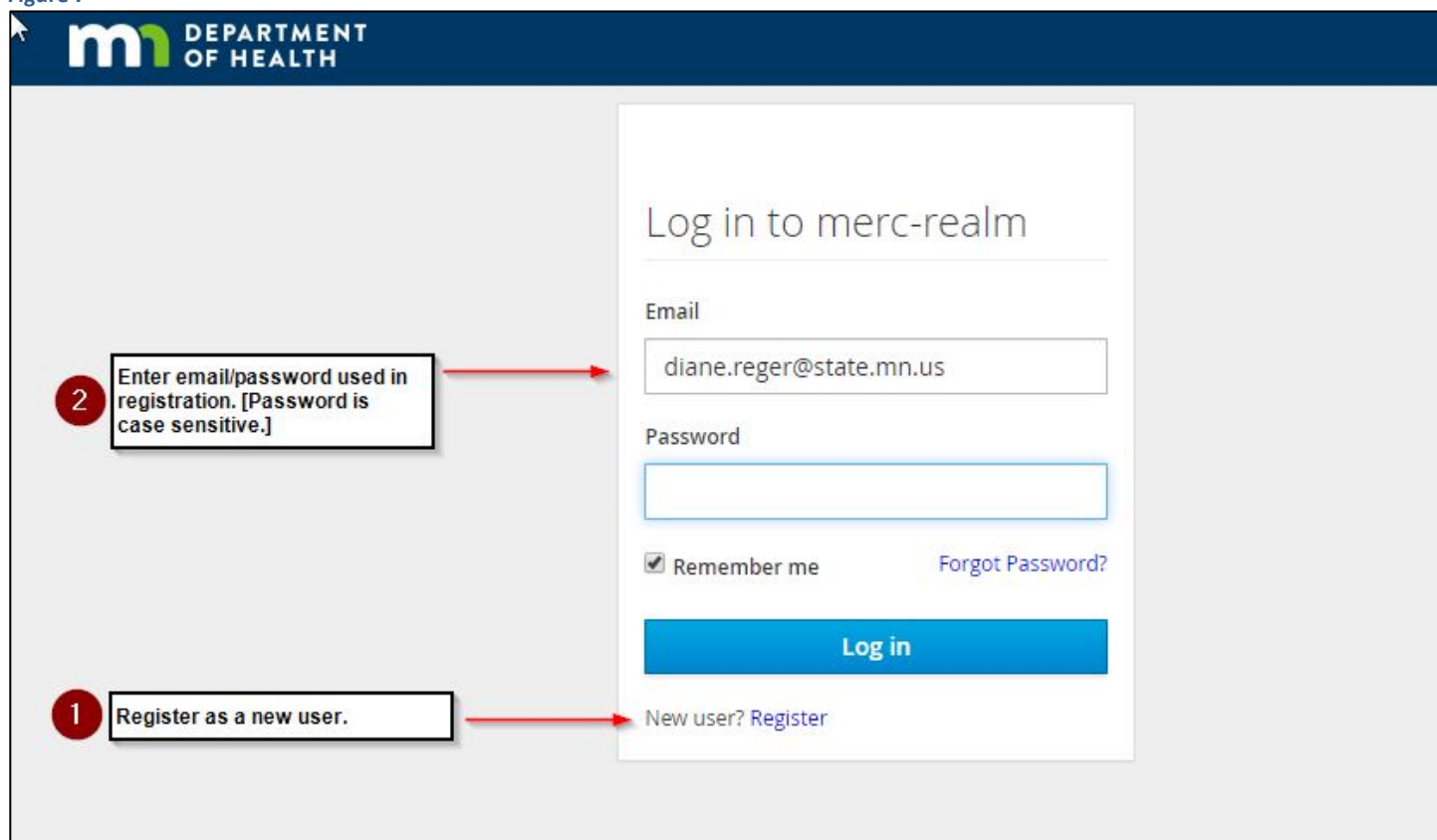
MDH may post alerts/notices below the menu bar found on the top of the screen. Refer to the message when using the system.

MERC Application Instructions

Portal Registration & Sign In

- New users must register.
 - Registration is based on username (email address).

Figure 7



1. New users must register for initial access.
 - Click Register and follow the prompts.
 - See Figure 8 on the next page for example.
2. Users who registered in a previous grant cycle do not need to register again. Enter the following:
 - Username (email address).
 - Password.
 - Press, log in.
 - Proceed to user profile in Figure 9.

Forgot Password? Press Forgot Password and follow the prompts.

MERC Application Instructions

User Profile

The profile is based on the username (email address) of the registered user.

Each user must complete a professional/work profile (name, job title, work phone, employer name, and their address at their place of employment). These fields are mandatory.

Figure 9

The screenshot shows the 'Manage User Profile' page in the 2018 Minnesota Clinical Training Site Grant Application. The page header includes the Minnesota Department of Health logo and the user's email address, 'diane.reger@state.mn.us'. The main content area is titled 'Manage User Profile' and contains a form with two sections: 'User Profile' and 'Employer Information'. The 'User Profile' section includes fields for Login Name, First Name, Last Name, Title, Email, and Phone. The 'Employer Information' section includes fields for Name, Address 1, Address 2, City, Select State, Zip Code, and Postal Code. An 'Update' button is located at the bottom of the form.

- Press Continue (or Update) to verify the information.
 - The user will be asked to verify their profile each time they access the application.
 - If no changes are necessary, scroll to the bottom of the screen and continue/update.
 - All data in the profile must correspond to the registered user (username/email).
 - Changes to the user's profile will be reflected throughout the application where the user is named.
 - Cannot change email.
 - Users must register for a new account if email is no longer valid (instructions in Figure 8, Step 1.)

Ability to Manage User Profile is also available on the top menu bar and the Home Screen (See Figure 10).

MERC Application Instructions

Home Screen

After signing in and confirming user profile, all users will be directed to the home screen (Figure 10).

1. The relevant application can be found using two options:
 1. Mid-screen under each applicant type, users will find a short definition.
 - Click the green box for Minnesota Clinical Training Site Grant Application.
 2. On the top menu bar, select Applications and then Minnesota Clinical Training Site.
2. Additional links on the home screen include:
 - Link to this instruction manual.
 - Ability to manage user profile.
 - Sign out of the application portal.

Figure 10



Sign Out

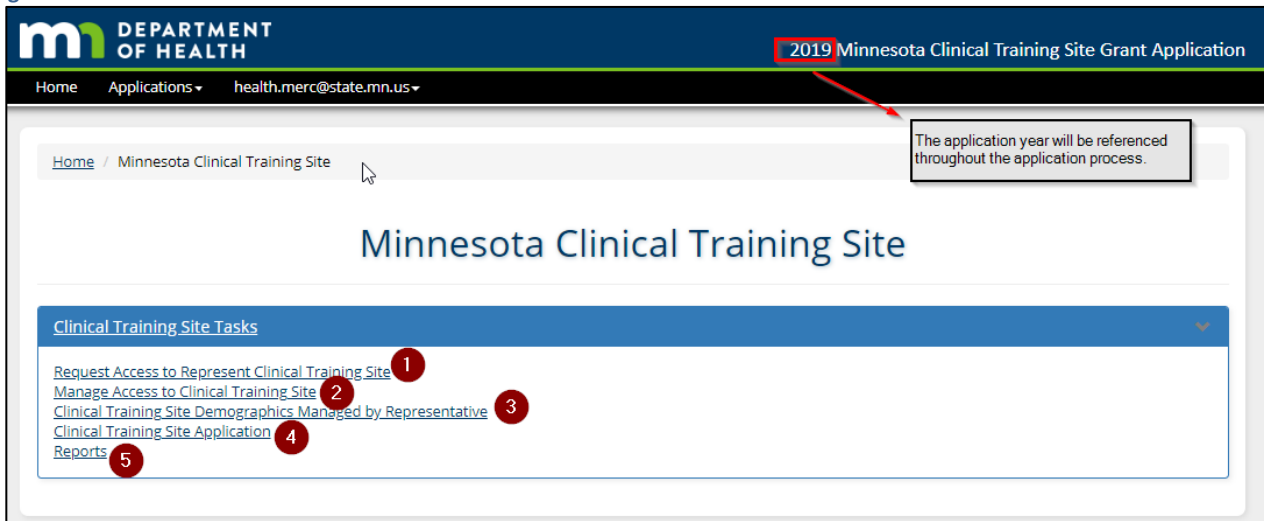
- Sign out is found on the top menu bar under the user's email (See Figure 10).

MERC Application Instructions

Minnesota Clinical Training Site Applicants

Where the students/residents gain clinical training experience in an inpatient or ambulatory patient care setting in Minnesota. A clinical training site is the Minnesota Health Care Program (MHCP) enrolled practice address where training occurred.

Figure 11



To begin the application process, the clinical training site representative must complete the tasks in the list below. Each task will be outlined in the figures and pages that follow.

- [Request Access to Represent the Clinical Training Site](#)(s) they will represent and/or complete applications for.
- [Manage Access to Clinical Training Site](#)(s).
 - a. Grant access to additional representatives from the training site.
- Complete [Clinical Training Site Demographics Managed by Representative](#).
 - a. Complete site details, payment address, and indicate site's intent to apply.
- [Clinical Training Site Application](#).
 - a. [Initial Application](#) - Step 1 (**Due September 30, 2024**)
 - b. [Expenditure Reporting](#) - Step 2 (**Due December 15, 2024**)
 - c. [Grant Verification Report](#) (GVR) Process (**Due July 15, 2025**)
- [Reports](#)

Tasks must be completed in order:

Tasks 1 & 3:	Opens August 15, 2024
Task 2:	As Needed
Task 4:	
Initial Application:	September 1 - 30, 2024
Verify Approval by Teaching Program:	October 15, 2024
Expenditure Reporting:	November 15 - December 15, 2024
Verification Report:	May 15 - July 15, 2025
Task 5:	As Needed

MERC Application Instructions

Task 1: Request Access to Represent Clinical Training Site

Representatives should be familiar with the clinical training that took place at the practice location along with the MHCP enrollment and identification number used for Medical Assistance (MA) / Prepaid Medical Assistance (PMAP) billing.

- The identification number is essential in determining the MA/PMAP claims reimbursement on record with the Minnesota Department of Human Services (DHS) for the location and facility type where training took place.
 - This data is used in the grant formula.

Representatives must identify each clinical training site they are authorized to represent in the grant application process.

- Once identified, this information will stay in place until the representative revokes their authorization.

Figure 12

Home / Minnesota Clinical Training Site / Request Access To Clinical Training Site

Request Access To Clinical Training Site

Search Criteria for Clinical Training Site

Search By: NPI FEIN MERC Application ID Site Name

Enter: * 1111111111

1 Search

Use dropdown to expand or limit the number of items on one page.

Search to narrow results.

2

3

Search Result for Clinical Training Site

Show 10 entries

Use arrows in table to sort.

Facility Name	Location	Type	NPI	FEIN	MERC Application ID	Status	Active	Main Hospital	Action
Test Site B	St. Paul	HOSPITAL	1111111111	*****111	222222222	CLAIMED	YES	YES	3 View
Test Site A	St. Paul	PHYSICIAN	1111111111	*****111	111111111	CLAIMED	YES	NO	View

Showing 1 to 2 of 2 entries

Previous 1 Next

1. Enter the site's National Provider Identification Number (NPI) or Federal Tax ID Number (FEIN) for the location where training took place.
 - Press search.

MERC Application Instructions

2. The search result will reflect [Minnesota Health Care Program](#) (MHCP) provider enrollment as of July 3, 2024.
 - While only locations with eligible trainees can apply, the representative can identify (claim) each site they represent in this part of the process.
 - In cases where a representative may represent multiple locations or facility types, the steps will be repeated.
 - If training was done in a [Hospital](#), the representative should claim the main hospital and each component/subparts of the hospital.
 - When the representative completes, the site demographics will address identifying the [main hospital](#) and the hospital [component/subpart](#).
 - The representative will later identify in [site demographics](#) if the site is applying.
3. Once the location and facility type has been identified, press view to continue.
 - The details of the site will open. Representatives must attest to being an authorized representative in the next section.

The site will populate based on enrollment in the [Minnesota Health Care Program](#) (MHCP).

The status will indicate 'unclaimed' unless a representative already identified themselves as the site's authorized representative. Multiple representatives can represent the site.

Figure 13

Home / Clinical Training Site / Search / View Clinical Training Site

Detail Information Of Selected Clinical Training Site

Selected Clinical Training Test A

Facility Name: Clinical Training Test A

Location: St. Paul

Address: 123 Main Street, St. Paul, MN, 55101

Type: PHYSICIAN

NPI: 1000000000

FEIN: *****000

MERC Application ID: 000000001

Status: UNCLAIMED

Active: YES

Check * By adding/claiming a clinical training site, user attests that they are an authorized representative of the clinical training site. *

1

2 Claim Back to Search Result

1. Attest to being an authorized representative.
2. Claim site representation.
a. If another representative has claimed, request will be sent to representative.
b. Once access is granted, both representatives will be listed.
c. Multiple representatives can be identified.

MERC Application Instructions

If you represent the site, proceed to the steps below:

- Attest to being an authorized representative.
- Claim the site.
 - The status will indicate 'unclaimed' unless a representative already identified themselves as the site's authorized representative.
 - The first representative to 'claim' representation, will be granted access.
 - Sites can have multiple representatives. In fact, it's encouraged to have a backup.
 - If another authorized representative 'claimed' the site first, the first representative must approve access to any additional representatives.
 - A system generated email will be sent to the first representative to notify them that access had been requested. The first representative can grant or deny access. See [Manage Access to Clinical Training Site](#).

Training in Hospitals: Claim each component of the hospital.

This is instrumental for gathering the MA/PMAP reimbursement data used to calculate the hospital's grant. (The [demographics](#) section will provide further details.)

MERC Application Instructions

Task 2: Manage Access to Clinical Training Site

The original user who identified themselves as an authorized representative, can authorize additional representatives.

Figure 14

The screenshot displays the 'Manage Access to Clinical Training Site' interface. At the top, there is a navigation bar with 'Home', 'Admin', 'Applications', and the user 'diane.reger@state.mn.us'. The main heading is 'Manage Access to Clinical Training Site'. Below the heading, there is a section titled 'Representatives Requesting Access'. A callout points to the 'Show 10 entries' dropdown, stating 'User can expand the number on one page.' Another callout points to the search bar, stating 'Search on username, site name, etc.' A third callout points to the status column, stating 'Use the arrows to sort.' A fourth callout points to the 'Revoke' button, stating 'Status change after action.' The table contains 7 entries with columns: From, Request Type, Name, Status, Comment, Denied or Revoked Reason, Requested Date, and Action. The 'Action' column contains 'Revoke' buttons for the last two entries.

From	Request Type	Name	Status	Comment	Denied or Revoked Reason	Requested Date	Action
arifun.chowdhury@state.mn.us	TRAINING_SITE	TEST Site C	GRANTED	Request for access to Training Site 20259 - 'TEST Site C'.		08/12/2019 08:38:46 AM	
arifun.chowdhury@state.mn.us	TRAINING_SITE	TEST Site A	GRANTED	Request for access to Training Site 20265 - 'TEST Site A'.		08/12/2019 08:39:03 AM	
arifun.chowdhury@state.mn.us	TRAINING_SITE	TEST Site b	GRANTED	Request for access to Training Site 20267 - 'TEST Site b'.		08/12/2019 08:39:15 AM	
cirrie.byrnes@state.mn.us	TRAINING_SITE	TEST Site C	DENIED	I request access please	YES! You should not be claiming this site.	08/12/2019 10:12:39 AM	
cirrie.byrnes@state.mn.us	TRAINING_SITE	TEST Site A	REVOKED	Request access to this site please.		08/12/2019 10:13:13 AM	
cirrie.byrnes@state.mn.us	TRAINING_SITE	TEST Site b	GRANTED	access please.		08/12/2019 10:13:41 AM	Revoke
cirrie.byrnes@state.mn.us	TRAINING_SITE	TEST Site A	GRANTED	made a mistake claim again!		08/12/2019 10:21:31 AM	Revoke

The following can be completed in this section:

- To view additional information:
 - Click on the username for additional information on who is requesting access.
 - Click on the site name to view additional information on the location the user is requesting access to.
- To grant, deny or revoke the user's access click the appropriate action in the action column.
 - All representatives will have the same authority in the system once access is granted.

Representatives receive a system generated notification granting, denying, or revoking their access.

MERC Application Instructions

Task 3: Clinical Training Site Demographics Managed by Representative

- Sites claimed by the representative are included in the table found on the demographics page.
- The demographics must be completed before a clinical training site application can be started.
- The representative must complete the site demographics and indicate which sites intend to apply.

Figure 15

Home / Minnesota Clinical Training Site / Clinical Training Site Demographics Managed by Representative

Clinical Training Site Demographics Managed by Representative

Clinical Training Site Demographic Information

Demographics must be completed before application is started. User must complete demographics, and indicate intent to apply. The field will be reflected in the table upon completion.

Clinical Training Sites

Show 10 entries

Click arrows to sort fields in the the column headers.

Fields will be blank until the representative complete this information in demographics. Site's who applied in the past, will have this information pre-filled based on their previous application. Edits when completing demographics.

Search:

Search based on any criteria is list is long.

Facility Name	Location	Address	Facility Type	NPI	FEIN	MERC Application ID	Main Hospital / Hospital Subpart or Free-Standing	Intends to Apply
Site A	MINNEAPOLIS	123 Main St. MINNEAPOLIS, MN 55407	PHYSICIAN		*****		Hospital Subpart Hospital Name and Hospital ID	YES Complete Demographics
Site B	MINNEAPOLIS	123 Main St. MINNEAPOLIS, MN 55415	HOSPITAL		*****		Hospital Subpart Hospital Name and Hospital ID	YES Complete Demographics
Site C	MINNEAPOLIS	456 First Street MINNEAPOLIS, MN 55401	HOSPITAL		*****		Free-Standing	NO Complete Demographics

1. Click 'Complete Demographics'.

MERC Application Instructions

Training Site Information

Figure 16

Home / Minnesota Clinical Training Site / Clinical Training Site Demographics Managed by Representative / Clinical Training Site Demographics

Clinical Training Site Demographics

Clinical Training Site Demographic Information

Items with an * are required.

Use arrows to expand or decrease sections throughout the application.

Training Site Information

Site Name: Example

Type: HOSPITAL

MERC Application ID: []

NPI: [] 2

FEIN: ***** []

Address Line 1: []

Address Line 2: []

City: []

Select State: MINNESOTA

Zip Code: []

Postal Code: []

Auto completed based on the training location's enrollment in the Minnesota Health Care Program (MHCP).

To apply for the grant, the site name and location must match where clinical training took place.

2. Site name, address, facility type, NPI, FEIN, MERC Application ID are prefilled based on the facility's enrollment in the [Minnesota Health Care Program](#) (MHCP).
 - When applying:
 - Information must correspond to where clinical training took place.
 - The facility must be enrolled in the MHCP to maintain eligibility.
 - This information is provided to the Minnesota Department of Human Services when the MERC program requesting MA/PMAP reimbursement data to calculate the grant.

Demographics must be completed for each site.

MERC Application Instructions

Hospital or Free-Standing

3. Indicate if the site is a hospital or free-standing.

Hospital

Licensed hospital includes Medicare certified provider-based clinics of the hospital and internal hospital pharmacies that are not retail.

This is an important step for hospitals! The information identified in this section is instrumental for gathering the MA/PMAP reimbursement data used to calculate the hospital's grant. It is the hospital's responsibility to report accurate information meeting CMS hospital requirements.

- Hospitals often have multiple components (subparts) and identification numbers covering the licensed hospital. These hospital components must be identified.
 - Identify the main hospital:
 - If demographics reflect the *main* hospital, the hospital is prefilled (Figure 17a).
 - If the site is a *hospital component (subpart)*, the information is not prefilled unless a representative provided the information in a previous application cycle (Figure 17b).
 - Review any previously provided information.
 - To identify the subpart as a component of the hospital, select the hospital name in the drop-down list. If no hospital options are available in the drop down list, return to the previous step of the application to indicate you are the authorized representative for the main hospital and [Request Access](#). Then return to complete the demographics.

Figure 17a

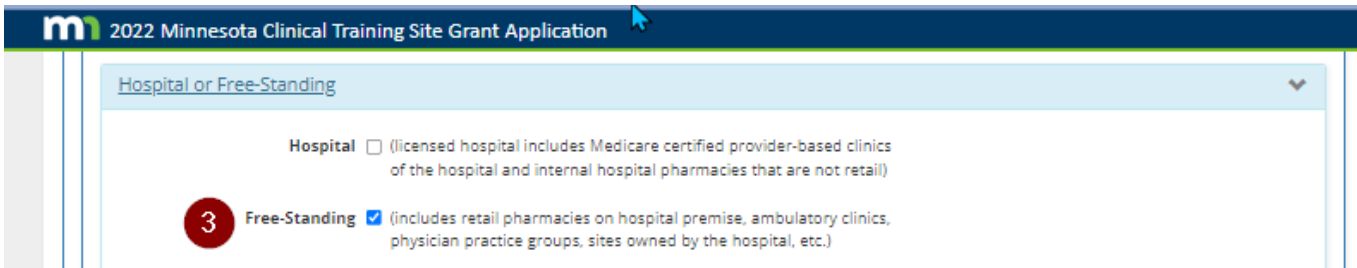
Figure 17b

MERC Application Instructions

Free-Standing (See Figure 18)

Free-Standing Sites (Include, but are not limited to, retail pharmacies on hospital premise, ambulatory clinics, physician practice groups, and sites owned by the hospital that do not meet the hospital definition.)

Figure 18



The screenshot shows the top of the application form with the title "2022 Minnesota Clinical Training Site Grant Application". Below the title is a dropdown menu labeled "Hospital or Free-Standing". Two options are visible: "Hospital" with an unchecked checkbox and a description "(licensed hospital includes Medicare certified provider-based clinics of the hospital and internal hospital pharmacies that are not retail)", and "Free-Standing" with a checked checkbox and a description "(includes retail pharmacies on hospital premise, ambulatory clinics, physician practice groups, sites owned by the hospital, etc.)". A red circle with the number "3" is placed next to the "Free-Standing" option.

If the site is not applying, no further action is needed after completing demographics.

Site-Based Clinical Training (SBCT) Grant

Due to the close alignment to the MERC grant, additional fields will be collected in the MERC application portal to assist with administration of the new [Site-Based Clinical Training Grant](#) that began in 2024. The Site-Based Clinical Training Grant program provides funding to clinical training sites that meet additional eligibility criteria as outlined in [Minnesota Statutes 144.1508](#).

If the site is applying in the current grant period for the SBCT grant, be prepared to provide information for the following in the Clinical Training Site Demographics:

- Is the site applying for a Site-Based Clinical Training Grant for fiscal year 2023 clinical training?
- Is the site located inside the Seven-County Metro Area (Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, or Washington) or outside the Seven-County Metro Area?
- If the training site does not have MA/PMAP reimbursement on record with the Minnesota Department of Human Services in 2023:
 - Did this site offer a sliding fee scale to Minnesota residents in 2023?
 - If the site offered a sliding fee scale:
 - Indicate the number of patient encounters provided under a sliding fee scale in 2023.
 - Upload a PDF of the sliding fee scale offered in 2023.

MERC Application Instructions

Opening the Application Process (See Figure 19)

Figure 19

The screenshot displays a web form with three main sections. The first section, titled "Medical Education and Research Cost (MERC) Grant", asks "Does the site intend to apply for a MERC Grant for fiscal year [2022] clinical training?" with radio buttons for "Yes *" and "No". The second section, titled "Site-Based Clinical Training (SBCT) Grant", asks "Does the site intend to apply for a SBCT Grant for fiscal year [2022] clinical training?" with radio buttons for "Yes *" and "No". Below this, it asks "If the site is applying for the SBCT Grant, is the site located:" with radio buttons for "Inside the Seven-County Metro Area (Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, or Washington)" and "Outside the Seven-County Metro Area". It then asks "If the site did not receive Medicaid (MA/PMAP) reimbursement in [2022] for Minnesota residents, did the site offer a Sliding Fee Scale?" with radio buttons for "Yes", "No", and "N/A". Below this, it asks "The questions below are required if the site only offered a sliding fee scale: Number of patient encounters provided under a sliding fee scale in [2022]:" with a text input field containing "1225". The third section, titled "Upload Sliding Fee Scale", asks "Upload a PDF of the [2022] Sliding Fee Scale" and features a file upload button "+ Select file to upload". Below this is a table with columns "Cycle Year", "Filename", "Download", and "Remove". The table contains one row for the year 2022 with the filename "test download of SBCT 08062024.png". At the bottom of the form is a "Save" button.

4

5

4. Indicate if the site is opening an application to apply for one or both grants.
 - MERC Grant
 - SBCT Grant – Additional questions must be answered if applying.
5. 'Save' the information in this section before continuing.
 - You'll need to scroll down to the next section after saving.

MERC Application Instructions

Figure 19b

Site Name	FEIN	MERC ID	NPI	Facility Type	Address
TEST Site b	*****114	444444444	111111111B	PHARMACY	One Happy Street USA Stillwater, MN 54321

Showing 1 to 1 of 1 entries

6. This section is viewable only by the main hospital (see Figure 19b).
 - The hospital components/subparts are identified in the table.
 - The representative must verify the list accurately reflects hospital components/subparts that meet CMS requirements.

Grant Mailing Address

This section will only appear for sites that indicate their intent to apply for a grant in the steps above.

Figure 20

Grant Mailing Address

Select Billing Type: * SAME AS AUTHORIZED REPRESENTATIVE (7)

Select Authorized User: * Diane Reger (8)

Facility Name: * Enter facility name

Address Line 1: * PO BOX 64882

Address Line 2: * Enter address line 2

City: * St. Paul

Select State: * MINNESOTA

Zip Code: * 55164

Postal Code: * 0882

Save (9)

Identify where potential grant funds should be sent.
a. Same as above (the site identified in #2).
b. Same as authorized representative (identify representative).
c. Other (complete the grant mailing section).

7. Identify where potential grant funds should be mailed.
 - Same as above (default - mail to the MHCP address identified in Figure 16, #2).
 - Same as authorized representative (mail to the identified representative using the address in the representative's user profile).
 - Other (complete the grant mailing section).
8. If authorize representative is selected in Step 7, identify the representative.
 - a. This will not appear unless authorized representative was selected in Step 7.
9. Save this selection.

MERC Application Instructions

Authorized Representative – Clinical Training Site

Figure 21

First Name	Last Name	Title	Email	Information
Diane	Reger	State Program Administrator - Coordinator	diane.reger@state.mn.us	Employer: State of Minnesota Line 1: PO BOX 64882 City: St. Paul State: MN Zip: 55164 Zip 4: 0882
arifun	chowdhury	QA analyst	arifun.chowdhury@state.mn.us	Employer: MDH Line 1: Saint paul Minnesota City: Blaine State: MN Zip: 34323 Zip 4: 0055

Showing 1 to 2 of 2 entries

10. This section identifies the representatives.

- No entry takes place. The information can be updated in the representative’s user profile.
- To remove a representative who is no longer associated with the organization, see Manage Access to Clinical Training Site (Figure 14).

**If you represent additional training sites, complete demographics for each site.
Return to the Minnesota Clinical Training Site page after demographics are complete.**

Task 4: Clinical Training Site Applications

This section contains sites identified in the clinical training site demographics as locations where training took place in fiscal year 2023.

To add or remove a site from the table, return to the [Clinical Training Site Demographics](#) and update the intent to apply.

- The teaching program and sponsoring institution fields in the table will be empty until the applicant begins the application.
- See [Application Status](#) to verify submission.

Submit the application before 4:30 pm (Central Time) on September 30, 2024. Applications that are not submitted will not be considered.

MERC Application Instructions

Figure 22

The screenshot shows the 'Clinical Training Site Application' web interface. At the top, there is a navigation bar with the Minnesota Department of Health logo and the text '2018 Minnesota Clinical Training Site Grant Application'. Below the navigation bar, there is a breadcrumb trail: 'Home / Minnesota Clinical Training Site / Clinical Training Site Application'. The main heading is 'Clinical Training Site Application'. Below this, there is a section titled 'Clinical Training Site Applications' with a search bar. A table lists two training sites, each with a 'Begin Application' button. The first button has a red circle with the number '1' next to it, indicating a step in the process. The table has columns for Training Site, Training Year, Teaching Program, Sponsoring Institution, and Action.

Training Site	Training Year	Teaching Program	Sponsoring Institution	Action
Test Site A Type: HOSPITAL Location: St. Paul	2018			Begin Application 1
Test Site C Type: PHARMACY Location: St. Paul	2018			Begin Application

Showing 1 to 2 of 2 entries

1. Click, Begin Application.

Begin/Create New Application

- The information provided in demographics will prefill the top section of the application.
 - Verify the information matches where training took place and the correct facility is listed.
 - If the facility is a hospital, the hospital components the user identified in demographics will be included in the application.
 - Return to demographics if information is not correct.
 - Each section of the application can be minimized as shown in the figure below.
 - The default shows each section in detail.

MERC Application Instructions

Figure 23

Home / Minnesota Clinical Training Site / Clinical Training Site Application / Create New Application

Create New Application

Create New Application

Items with an * are required.

Arrows allow user to expand or reduce each section. Default is expand.

Site Application

Facility

Authorized Representatives

Grant Mailing Address

Auto completed based on the data entered on the demographics page.

Figure 24

Hospital Subparts

The representative has identified the hospital subparts* below as licensed hospital, Medicare certified provider-based clinics, or internal hospital pharmacies.

The subparts identified on the hospital's grant application will be included in the hospital's grant formula.

*Subparts must be identified in clinical training site demographics. Refer to the grant instructions for details.

Search:

Site Name	FEIN	MERC ID	NPI	Facility Type	Address
Test Site B	*****111	333333333	11111111111	PHYSICIAN	123 Main Street S Minneapolis MN 12345

Showing 1 to 1 of 1 entries

MERC Application Instructions

Clinical Trainees at Facility

Use the clinical trainee data provided by the teaching program to complete this section of the application.

- Questions regarding the trainee data should be directed to the teaching program representative prior to submitting the application.

In each field, select from the options available in the drop-down list.

- Allow time for the field to process before moving to the next field.
- The options are based on the sponsors and programs registered in the application portal.
- An application cannot be submitted to a sponsor/program that is not applying (error message will appear). The sponsors/programs should open their applications by August 31.
- If the training site hosted multiple teaching programs, sponsoring institutions, and trainee types, repeat Steps 1 – 6 below.

Figure 25

The screenshot shows the 'Clinical Trainees at Facility' application interface. At the top, there is a search bar. Below it is a table with the following columns: Trainee Type, Sponsoring Institution, Teaching Program, Trainee Setting, Fulltime Equivalent (FTE) Clinical Trainee, Created/Submitted, and Action. The table currently displays 'No data available in table'. Below the table, there are several input fields with red circles numbered 1 through 6 indicating the steps to complete the form:

- 1. Trainee Type: ADVANCED PRACTICE NURSES
- 2. Sponsoring Institution: Test Sponsor Diane1
- 3. Teaching Program: Test Program A
- 4. Trainee Setting: INPATIENT
- 5. Fulltime Equivalent (FTE) Clinical Trainee: 1.234
- 6. Add/Reset buttons

On the right side of the form, there is a red box containing the following error messages:

- Must complete in order.
- Sponsor and Program must be applying.
- Repeat to add additional program.
- Clinical Trainee FTEs must be based on data provided by teaching program for the FY collected.

1. Program Type: The type of trainee/program.
 2. Sponsoring Institution: The name of the sponsoring institution.
 3. Teaching Program: The name of the teaching program.
 4. Trainee Setting: The practice setting where the training took place. (Select: inpatient, ambulatory, or both).
 5. FTE Clinical Trainee Count: Enter the clinical trainee FTEs provided by the teaching program. Truncate trainee count at four decimals. Do not round FTE count.
 6. Add/Reset: Add to list of programs (or) Reset to clear the fields.
- As the applications are added, they will appear in the table.
 - Prior to submission, the information can be edited or deleted as necessary (Figure 26).
 - Add all teaching programs before submitting the application.
 - Additions after the application deadline, will not be accepted.

MERC Application Instructions

Figure 26

Clinical Trainees at Facility

Search:

Trainee Type	Sponsoring Institution	Teaching Program	Trainee Setting	Fulltime Equivalent (FTE) Clinical Trainee	Created/Submitted	Action
Medical Residents	Test Sponsoring Institution Status: NEW	Test Program A Status: NEW	INPATIENT	1.0	Created by: health.merc@state.mn.us	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 1 of 1 entries

Trainee Type:

Trainee Setting:

Fulltime Equivalent (FTE) Clinical Trainee:

Callout Boxes:

- Status change to Submitted when submitted to MDH.** (Points to the 'NEW' status in the Sponsoring Institution column)
- Status changes to PENDING after submission to teaching program. Changes to Submitted after submission to the sponsor.** (Points to the 'NEW' status in the Teaching Program column)
- Created by will be noted. When submitted, will change to the username of the person who submitted.** (Points to the 'Created by' field)
- Can edit or delete before submitting to the teaching program for approval. Once submitted, Action will change to "Application submitted to Teaching Program."** (Points to the Edit and Delete buttons)

Notice of MERC Expenditure Report Requirements

Sites meeting the total trainee minimum of 0.1000 FTE are required to submit an expenditure report in Step 2 of the MERC application process.

Figure 27

Expenditure Report Requirements

Refer to the application for dates. Screen shots are examples only.

The Minnesota Department of Health will collect clinical training expenses in November 2020. Expenditure reports will be due within 30-days of the initial request. Grant applicants must adhere to the expenditure deadline to qualify.

Grant amounts are determined based on the eligibility criteria and formula defined in Minnesota Statute 62J.692. Available funding will not exceed the facility's reported clinical training expenses for qualifying MERC programs and trainees.

- Step 2 of the application process will open by November 15, 2024.
 - On November 15, 2024, sites are responsible for entering the application portal and submitting expenses associated with the application's clinical training.
 - Expense categories and instructions are found on the MERC [website](#).
- Expenditure reports must be submitted by December 15, 2024.
 - Sites with expenditures under \$5,000 or not meeting the minimum requirements of the formula will not qualify for MERC funding.

MERC Application Instructions

Signature & Submission to Teaching Program(s)

Figure 28

The screenshot shows a web form titled "Signature of Authorized Representative". At the top, there is a checkbox with a red box around it and a red circle with the number 8. Below the checkbox is a paragraph of text: "certify that I am an authorized representative approved by the facility named above. I have sufficient knowledge about the facility's MHCP enrollment, identification numbers used for Medicaid billing, and clinical medical education costs. I attest that the training facility hosted clinical trainees in fiscal year 2018. I am aware that the data I provide in the application and expenditure report will be used for grant eligibility and calculations. The data included in the application is accurate and I will comply with all laws related to MERC Statute 62J.692." Below this text are four input fields: "Name:", "Title:", "Email:", and "Date Signed:". A callout box with a red circle 8 points to the checkbox. Another callout box with a red circle 8 points to the text "I am aware that the data I provide...". A callout box with a red circle 7 points to the "Save" button. A callout box with a red circle 9 points to the "Submit" button. At the bottom of the form are three buttons: "Cancel", "Save", and "Submit".

7. Save the application until you are ready to submit.
 - A message will appear on the top of the screen indicating that the application has been saved.
 - Application is not submitted!
 - Return to the application and scroll to the bottom of the page when ready to submit (See next section).
 8. **Do not complete Step 8/9 until you are ready to submit your application.**
 - Check the box for e-signature.
 9. Submit the application to the sponsors/teaching programs in the clinical trainee section.
 - Once the application is submitted, the application will appear in the teaching programs and sponsoring institutions grant application requesting approval.
 - Step 1 of the application will be reviewed by the corresponding teaching program(s).
 - See [Application Status](#) for details.
- **Applications will not be accepted after 4:30 pm (Central Time) on September 30, 2024.**

Denied/Disapproved Applications

After submission, Step 1 of the application process will be reviewed by the teaching program and sponsoring institution. In rare cases, if a clinical training site met the application deadline but the application was inconsistent with the records of the teaching program, the teaching program will notify the site representative on record and disapproved/deny the site's application. **It's the sites responsibility to review the application's status by October 15. Denied applications must be removed or amended/resubmitted to the teaching program upon request. The teaching program's final approval must be in place before October 20. Denied/Disapproved applications not approved by October 20, will not be accepted.** In extremely rare circumstances, the application may be removed by the teaching program and reported for non-compliance to the Minnesota Department of Health.

MERC Application Instructions

Printing

Use the print function found on the top right of the corresponding page to print a PDF document of the submission. These documents are part of the grant application process and should be maintained in your internal records.

Application Status

The application's status will be recorded throughout the process in the Clinical Training Site Application table. The status will be indicated in each section according to the applicant.

SP = Sponsoring Institution

TP = Teaching Program

TS = Training Site

Table 2

Status	Definition
NEW	Application Opened.
PENDING	Pending.
DISAPPROVED	Disapproved. Correction needed.
APPROVED	Approved. Pending submission by Program/Sponsor to MDH.
SUBMITTED	Submitted.

Figure 29

The screenshot shows the 'Clinical Training Site Application' web interface. At the top, there is a navigation bar with 'Home', 'Applications', and 'health.merc@state.mn.us'. Below this is a breadcrumb trail: 'Home / Minnesota Clinical Training Site / Clinical Training Site Application'. The main heading is 'Clinical Training Site Application'. A blue header for the table reads 'Clinical Training Site Applications'. A search box is located at the top right of the table area.

Training Site	Training Year	Teaching Program	Sponsoring Institution	Action
Test Site A Type: HOSPITAL Location: St. Paul	2018	Test Program A Status: NEW	Test Sponsoring Institution Status: NEW	Edit View
Test Site C Type: PHARMACY Location: St. Paul	2018	Test Program B Status: PENDING	Test Sponsoring Institution Status: NEW	View Amend

Showing 1 to 2 of 2 entries

Annotations in the screenshot:

- A red box highlights the 'Edit' button for the first application with the text: "Site has not been submitted. Edit to continue."
- A red box highlights the 'View' button for the second application with the text: "Application submitted. Pending Approval."
- A red box at the bottom of the screenshot contains the text: "Cannot edit the application already submitted to a program unless program disapproves. Site application can be amended to include additional teaching programs not previously submitted."

MERC Application Instructions

Figure 30

The screenshot shows the 'Clinical Training Site Application' page. At the top, there is a breadcrumb trail: Home / Minnesota Clinical Training Site / Clinical Training Site Application. Below this is the title 'Clinical Training Site Application'. A blue header bar contains 'Clinical Training Site Applications' and a search box. The main content is a table with columns: Training Site, Training Year, Teaching Program, Sponsoring Institution, and Action. Two rows are visible. The first row, for 'Test Site A' (HOSPITAL, St. Paul, 2018), has a 'Teaching Program' status of 'TP-DISAPPROVED' and a comment: 'FTE error, please correct. Should be 0.1'. The 'Sponsoring Institution' status is 'SP-DISAPPROVED'. The 'Action' column has 'Edit' and 'View' buttons. The second row, for 'Test Site C' (PHARMACY, St. Paul, 2018), has a 'Teaching Program' status of 'TP-SUBMITTED' and a 'Sponsoring Institution' status of 'SP-SUBMITTED'. The 'Action' column has 'View' and 'Amend' buttons. A red box highlights the 'Teaching Program' cell of the first row, with a red arrow pointing to the 'Edit' button. A larger red box at the bottom contains the text: 'If the application is DISAPPROVED, edit the teaching program information and resubmit to the teaching program for approval. See comment from program or contact program representative if they have not already made contact.'

Training Site	Training Year	Teaching Program	Sponsoring Institution	Action
Test Site A Type: HOSPITAL Location: St. Paul	2018	Test Program A Status: TP-DISAPPROVED Comment: FTE error, please correct. Should be 0.1	Test Sponsoring Institution Status: SP-DISAPPROVED	Edit View
Test Site C Type: PHARMACY Location: St. Paul	2018	• Test Program B Status: TP-SUBMITTED • Internal Medicine Status: PENDING • Clinical Pharmacy Status: TP-SUBMITTED	• Test Sponsoring Institution Status: SP-SUBMITTED • Abbott Northwestern Hospital Status: NEW • Abbott Northwestern Hospital Status: NEW	View Amend

Showing 1 to 2 of 2 entries

If the application is DISAPPROVED, edit the teaching program information and resubmit to the teaching program for approval. See comment from program or contact program representative if they have not already made contact.

Task 5: Reports

Throughout the application process, applicants can download reports. Reports fields reflect the information entered at the time the report is processed. Grants determinations will be loaded into the report by April 30, 2025.

Figure 31

The screenshot shows the 'Minnesota Clinical Training Site' page. At the top, there is a breadcrumb trail: Home / Minnesota Clinical Training Site. Below this is the title 'Minnesota Clinical Training Site'. A blue header bar contains 'Clinical Training Site Tasks'. Below the header, there is a list of tasks: 'Request Access to Represent Clinical Training Site', 'Manage Access to Clinical Training Site', 'Clinical Training Site Demographics Managed by Representative', 'Clinical Training Site Application', and 'Reports'. The 'Reports' link is highlighted with a red box and a red circle with the number '1' next to it.

Home / Minnesota Clinical Training Site

Minnesota Clinical Training Site

Clinical Training Site Tasks

- [Request Access to Represent Clinical Training Site](#)
- [Manage Access to Clinical Training Site](#)
- [Clinical Training Site Demographics Managed by Representative](#)
- [Clinical Training Site Application](#)
- [Reports](#) 1

MERC Application Instructions

Figure 32

The screenshot shows a web interface for 'Report List' with the following elements:

- Breadcrumb: Home / Minnesota Clinical Training Site / Report List
- Section Header: Report List
- Sub-header: Cycle Year: 2018
- Message: Some reports might take longer time to download. Please be patient.
- Buttons: Download All Applications, Download All Expenditures
- Search: Search: [input field]
- Table with columns: Cycle Year, Training Site, MERC Application ID, Application Status, Action
- Table Row: 2018, [Placeholder: SITE NAME APPEARS HERE], [Placeholder: APP ID APPEARS HERE], [Placeholder], TS-SUBMITTED
- Action Buttons: Download Applications, Download Expenditures

Red boxes highlight the 'Download All Applications' button and the 'Download Applications' button in the table's Action column. A red circle with the number '2' and an arrow points to the 'Download All Applications' button.

1. Press, Reports.
2. Select the application report (see [expenditure manual](#) for details on expenditure reports).
 - a. Download all – Representatives who manage more than one application have the option to pull information into one Excel report.
 - b. Download – Download each application individually.
 - c. Save the report in your grant records.

MERC Application Instructions

Step Two: Minnesota Clinical Training Site Expenditure Instructions

Expenditure Overview

Step 2 will open in the application portal on November 15, 2024, for Clinical Training Sites that applied for the MERC grant and met the minimum trainee requirements in Step 1. As noted in the application deadline, **sites must submit or withdraw from Step 2 by 4:30 pm (Central Time) on December 15, 2024.**

Sites with expenditures under \$5,000 or not meeting the minimum requirements of the formula will not qualify for funding.

Grantees are responsible for maintaining records (including, but not limited to, time certifications or time studies, payroll and purchasing records) that verify all expenses, whether categorized as direct or indirect, for six years from the end of the grant.

Task 1: Preparation Spreadsheet

Before Step 2 opens, review the expenditure instructions and complete the [Preparation Worksheet](#). The worksheet will assist training sites in gathering FY2023 clinical training expenditures that will be reported in the application portal and submitted to MDH when Step 2 opens on November 15, 2024.

Sites must retain a copy of the Preparation Worksheet as part of the grant records.

Worksheet categorization:

- Gray tabs — Provide additional information and instructions.
- Green tabs — Expenditure worksheets. Data entered on these worksheets will be used to guide users in completing expenditure reporting in the application portal.
- Blue tabs — For use in running calculations or attaching supporting documentation.

Spreadsheet includes:

- Technical Assistance (gray tab)
- Definitions (gray tab)
- MERC Expenditures (green tab)
- Preceptor Time Factor (green tab)
- Trainee Stipends & Benefits (blue tab)
- Preceptors Stipends & Benefits (blue tab)
- Direct Operating Costs (blue tab)
- Incurred by Teaching Hospital (blue tab)
- Indirect Costs (blue tab)
- Federal Indirect Rate Agreement (blue tab)
- Funding & Support Received (blue tab)
- Additional Worksheets 1, 2, 3, 4, 5, 6, 7, 8, & 9 (blue tab)

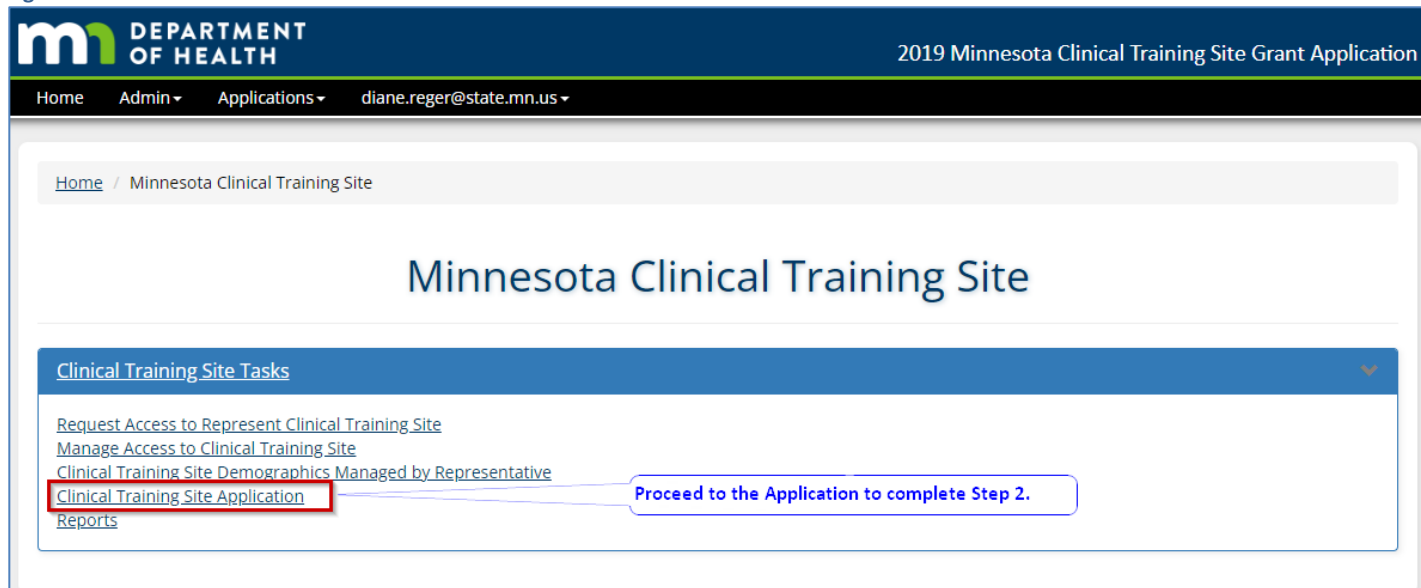
Calculations may vary slightly due to rounding. Figures are truncated where possible.

MERC Application Instructions

Task 2: Reporting Expenditures in the Portal

After entering the application portal, <https://merc.web.health.state.mn.us> proceed to the Minnesota Clinical Training Site section.

Figure 33



1. Click on Clinical Training Site Application.

MERC Application Instructions

Representatives who manage multiple clinical training sites may find it helpful to use the sort/search functions.

1. Sort alphabetically using the up/down arrow in the table header (#1 in Figure 34).
2. Search by site name, grant application ID, or by the status of completing the report in the search box (#2 in Figure 34).
3. Open Step 2 of the application process by clicking the Report Expenditures button on the right (#3 in Figure 34).
 - o For sites below the 0.10 FTE trainee minimum, the portal will display a message indicating an expenditure report has not been requested. No expenditure button will appear.

Figure 34

The screenshot shows the '2019 Minnesota Clinical Training Site Grant Application' portal. The main heading is 'Clinical Training Site Applications'. Below the heading, there is a search bar (annotated with a red circle and the number 2) and a 'Show 10 entries' dropdown. The main content is a table with the following columns: Training Site, Training Year, Teaching Program and Sponsoring Institution, and Action. The table contains two rows of data. The first row is for a site with a total FTE of 0.0962, where 'Expenditures Not Submitted' and 'Expenditures Not Requested'. A red circle and the number 1 is placed over the sort icon in the 'Training Year' column header. The second row is for a site with a total FTE of 9.2302, where 'Expenditures Submitted'. A red circle and the number 3 is placed over the 'Report Expenditures' button in the 'Action' column for this row.

Training Site	Training Year	Teaching Program and Sponsoring Institution	Action
[Redacted]	2019	Teaching Program (Type) Expenditures Not Submitted Total FTEs: 0.0962 Expenditures Not Requested ** This site does not meet the minimum 0.10 FTE requirement, the site is not eligible for a grant. ** Sponsoring Institution [Redacted] FTEs: 0.0962 Status: SP-SUBMITTED	View Application Amend Application
[Redacted]	2019	Teaching Program (Type) Expenditures Submitted Total FTEs: 9.2302 Sponsoring Institution [Redacted] FTEs: 0.2308 Status: SP-SUBMITTED [Redacted] FTEs: 2.2800 Status: SP-SUBMITTED	View Application Amend Application Report Expenditures Grant Verification

MERC Application Instructions

The initial application submitted in Step 1 is summarized.

Figure 35

Site Application Information

Training Site: [REDACTED]
Type: [REDACTED]
Location: [REDACTED]
Address: [REDACTED]
MERC ID: [REDACTED]

Sections can be minimized at users discretion.

Trainee Type	Sponsoring Institution	Teaching Program	Trainee Setting	Fulltime Equivalent (FTE) Clinical Trainee
Advanced Practice Nurses	[REDACTED] Status: SP-SUBMITTED	[REDACTED] Status: TP-SUBMITTED FTEs: 0.0886	AMBULATORY	0.0886
Advanced Practice Nurses	[REDACTED] Status: SP-SUBMITTED	[REDACTED] Status: TP-SUBMITTED FTEs: 0.4967	AMBULATORY	0.4967
Advanced Practice Nurses	[REDACTED] Status: SP-SUBMITTED	[REDACTED] Status: TP-SUBMITTED FTEs: 0.1058	AMBULATORY	0.1058

Total Site FTEs: 0.6911

FTE total

MERC Application Instructions

Withdrawing the MERC Grant Application

If a training site chooses to withdraw their initial MERC grant application and forgo reporting clinical training expenditures, follow the steps below.

Steps for withdrawing from the MERC grant (Figure 36):

1. Click, 'Withdraw Grant Application'. Alert message warns the representative of their confirmation to withdrawal the grant application.
2. Representative authorization - click the box to certify approval to withdraw the grant application.
3. Authorized Representative's information will populate and serve as an electronic signature once certification box has been checked.
4. Click, 'Withdraw Grant Application' to submit.

Figure 36

The screenshot displays the 'MERC Grant Clinical Training Expenditures' web interface. At the top, there is a 'Print Expenditures' button and a note: 'Items with an * are required.' Below this is a navigation bar with 'Site Application Information' and 'Expenditure Report Requirements' sections. The 'Expenditure Report Requirements' section contains text about site FTE (72.5543) and reporting deadlines. A red box highlights a checked checkbox for 'Withdraw Grant Application' with a red circle '1' next to it. Below this is a yellow warning box with a triangle icon and text: 'I certify that the clinical training site I represent is opting out of the required clinical training expenditure report by withdrawing their MERC grant application. By withdrawing, I understand the site will not be eligible for a grant. This will close the grant application.' Another red box highlights a checkbox for representative authorization with a red circle '2' next to it. Below that is a form with fields for 'Name', 'Title', 'Email', and 'Date Signed', with a red circle '3' next to the 'Name' field. At the bottom, a red box highlights a 'Save' button and a 'Withdraw Grant Application' button, with a red circle '4' next to the 'Withdraw Grant Application' button.

MERC Application Instructions

Direct Costs

Direct costs include costs for activities, goods, or services that benefit, and can be traced, to a specific project.

As much as possible, grant funds should support direct costs that correspond with program activities (as opposed to direct costs that correspond with administrative activities, as described in 'Administrative Costs').

Student/Resident Trainee Stipend & Benefits

Trainee stipends are the salary or allowance paid to the residents/students. Benefits are compensation provided to the residents/students in addition to their salary or allowance.

Only expenditures for the trainees included in the site's MERC grant application can be claimed.

1. Enter in trainee stipends and benefit amount. Only use whole numbers. (#1 in Figure 37)
2. Click "Calculate Totals" to sum the cost category for Student/Resident Trainee Stipends & Benefits before proceeding to the next section. (#2 and #3 in Figure 37)

Figure 37


Trainee Type	FTE Clinical Trainees	Trainee Stipends/Benefits (Annual)
Advanced Practice Nurses	0.6911	\$ 0.00

Student/Resident Stipends & Benefits: \$0

Figure 38

Trainee Stipends

Stipend paid to the trainee(s) for the FTEs included in the site's application.



MERC Application Instructions

Faculty/Preceptor Stipends & Benefits

The average salary and benefits paid (at a reasonable rate) to faculty/preceptors for direct clinical training.

1. Click “?” in the table heading for detailed descriptions.
2. Complete all fields (\$0 if none).
3. Tab or use the scroll bar at the bottom of the section to navigate.
4. Click “Calculate Totals” to sum all figures.

Figure 39

Faculty / Preceptor Stipends & Benefits

Please use the scroll bar below to scroll right to view **Flat Teaching Stipend Paid** and **Preceptor Training Costs**.

Time Factor Methodology
A. Extra time added to the preceptors day
B. Hospital Medicare Cost Report
C. Patient care department data/preceptor time studies

Trainee Type	FTE Clinical Trainees	Preceptor Stipend & Benefits (Average Annual) ?	Preceptor Time Factor ?	Time Factor Methodology ?	Calculated Faculty FTE ?	Calculated Faculty Cost	Flat Teaching S Paid ?
Medical Students	0.5576	\$ 0.00	0.0	%	---Select---	0.0000	\$0

Scroll bar

Calculate Totals

Total Faculty / Preceptor Stipends & Benefits: \$ [REDACTED]

Click 'Calculate' Once Figures are Entered

Figure 40

Preceptor Costs

Average annual salary/benefits paid to the preceptor(s).

Training time factor: Additional percentage of time that training adds/increases the preceptor's typical workday.

Flat teaching stipend (above their normal salary) that is paid by a teaching hospital to a preceptor specifically for time spent in direct teaching.

Preceptor training costs incurred by the site for teaching the preceptor how to precept.

MERC Application Instructions

Preceptor Stipends & Benefits (Average Annual)

The average annual salary/benefits for preceptors.

- If there are multiple preceptors, add their annual salary together then determine the average by dividing the total annual salary by the number of preceptors (use whole numbers).
- If faculty are instead paid a flat teaching stipend, see [Flat Teaching Stipend](#).

Preceptor Time Factor

The percent of time the preceptor spends in direct training.

- Use the time factor methodology worksheet and the data prepared in the Excel spreadsheet to complete the time factor.
 - Generally, faculty/preceptor do not solely focus on teaching, and often their primary duties include other clinical or administrative services; therefore, the time factor for clinical training is not 100%. The only exception to this is when the cost of teaching reflects a hospital's Medicare Cost Report where the salary has already been adjusted and the costs associated with other services removed.

Time Factor Methodology

Indicate methodology used for each Trainee Type.

- Methodology A: Extra Time Added to the Preceptor's Clinical Day for Precepting
- Methodology B: Hospital's Medicare Cost Report (Hospital only)
- Methodology C: Patient Care Department Data /Preceptor Time Studies

Calculated Faculty FTE

A preloaded formula calculates the faculty FTE based on the FTE trainee count multiplied by the preceptor time factor.

Calculated Faculty Costs

The calculated portion of faculty stipends/benefits determined based by the time factor and methodology attributed to direct training.

Flat Teaching Stipend

Flat teaching stipend paid to the preceptor (by a teaching hospital) specifically for time spent in direct teaching. (The time factor does not affect this amount.)

Sites cannot claim a flat teaching stipend in addition to preceptor stipends/benefits.

Preceptor Training Costs

Training costs associated with training the preceptor on precepting. This does not apply to other training for the preceptor. (The time factor does not affect this amount.)

MERC Application Instructions

Direct Operating Costs

Expenses directly related to training MERC eligible trainees.

Figure 41

Trainee Type	Trainees	Admin Costs ?	On Boarding Cost Trainee ?	Clinical Trainee Costs ?	Operating Costs ?	Total
Medical Residents	13.0	\$ Enter whole dc	\$ Enter whole doll	\$ Enter whole dol	\$ Enter whole doll:	\$0.00
PharmD Residents	35.0	\$ Enter whole dc	\$ Enter whole doll	\$ Enter whole dol	\$ Enter whole doll:	\$0.00

2 Calculate Totals


1 Enter costs - use only whole numbers

Total Operating Costs Directly Related to Training MERC Eligible Trainees: \$0.00 3

Figure 42

Operating Costs

Direct costs traceable to trainees



Administrative Support Costs
Includes: administrative record keeping, administrative support staff and materials, supplies, postage, and printing.

Trainee Onboarding Costs
Includes: ACGME certification, onboard testing, lab coats, trainee computer equipment (software, cell, pager), recruitment, and advertising.

Clinical Trainee Costs
Includes: trainee malpractice insurance, conference training and travels, dues, subscription, books, food, parking and mileage, skills labs and simulation center, student/resident housing stipends, orientations, receptions, retreats, library, and IT/email/software licensing.

Operating Costs
Includes: Fees paid to program sponsors, call room lease, security, housekeeping, non-preceptor clinical support staff training, and MMCGME fees.

Click “?” in the table heading for detailed descriptions.

1. Enter in cost for each of the cost categories. Tab or scroll to the right to move through the section.
2. Click “Calculate Totals” to sum cost categories.

MERC Application Instructions

Administrative Costs

Administrative costs are those for activities, goods, or services that correspond with administrative functions directly related to an organization. Sometimes administrative costs benefit and can be traced to a specific project, and in those cases, are categorized as direct costs. Other times administrative costs benefit more than one project and cannot be traced to a specific program. In those cases, they are categorized as indirect costs. MDH asks all grantees to minimize administrative costs so that, as much as possible, grant funds instead support direct costs that are related to program activities. This includes costs related to administrative record keeping, administrative materials, administrative support staff, supplies, postage, and printing.

Examples of administrative costs categorized as direct costs:

- A portion of the organization's administrative support, accounting, or human resources, calculated by tracking time spent by staff on a MERC related program.
- A portion of the organization's occupancy costs, calculated by applying a square footage cost total to the amount of physical space used solely for MERC related grant program management and activities.

Examples of administrative costs categorized as indirect costs:

- A portion of the organization's administrative support, accounting, or human resources, when an internal system does not allow time to be tracked by project.
- A portion of the organization's occupancy costs when it is not feasible or reasonable to calculate by project.

On-Boarding Costs Trainee

Include initial and recurring costs related to Accreditation Council for Graduate Medical Education (ACGME), certification, testing, lab coats, computer equipment, software, cell, pager, recruitment, and advertising.

Clinical Trainee Costs

Include costs related to malpractice insurance, conference training and travels, dues, subscriptions, books, food, parking and mileage, skills labs and simulation center, student/resident housing stipends, orientations, receptions, retreats, library, and IT/email/software licensing.

Operating Costs

Include costs related to fees paid to program sponsor(s), call room lease, security, housekeeping, non-preceptor clinical support staff related training, and MMCGME fees.

MERC Application Instructions

Cost Incurred by Other Organizations

This section only applies to costs incurred by teaching hospitals and expenses that have been incurred during the clinical training cycle that were paid by a third party.

Examples of costs incurred by other organizations:

- Trainee stipends and benefits incurred by the teaching hospital for an outlying clinic.
- Hosting fees incurred by teaching hospital for an outlying clinic.

If the third-party organization has also applied for the grant, only one applicant, not both, can report expenses. The third-party organization must be named in the expenditure report.

MDH recommends that expenses related to trainee FTEs be reported under the clinical training site where the training occurred; this ensures the costs associated with the trainees have a defined accounting trail.

Click “?” in the table heading for detailed descriptions.

1. Enter in cost for each of the cost categories.
2. Enter name of teaching hospital in the “Name of Teaching Hospital” field.
3. Click “Calculate Totals” to sum all cost categories.

Figure 43

Cost Incurred by Other Organizations

Only applies to **costs incurred by teaching hospitals** for an outlying clinic of the hospital.

Trainee Type	FTE Clinical Trainees	Trainee Annual Stipends & Benefits ?	Hosting Fees for MERC Eligible Trainees ?	Name of Teaching Hospital that Incurred the Expenses ?	Total
Medical Residents	13.0	\$ Enter whole dollar	\$ Enter whole dollar c	Enter Hospital Name	\$0.00
PharmD Residents	35.0	\$ Enter whole dollar	\$ Enter whole dollar c	Enter Hospital Name	\$0.00

1 Enter in costs- Use only whole numbers

2 Enter in name(s) of Teaching Hospital

3 Calculate Totals

4 Total Cost Incurred by Other Organizations: \$0.00

MERC Application Instructions

Figure 44

Cost Incurred by Other Organizations

Applies only to teaching hospitals for costs incurred that were paid by a third party

Trainee Stipends
Includes: Trainee stipends and benefits incurred by the teaching hospital for an outlying clinic.

Hosting Fees
Includes: Hosting fees incurred by teaching hospital for an outlying clinic.

Name of Teaching Hospital Incurring the Expense
The name of the teaching hospital incurring the expense.

Operating Costs
Includes: Fees paid to program sponsors, call room lease, security, housekeeping, non-preceptor clinical support staff training, and MMCGME fees.

Funding & Support Received

Financial resources provided by the government, person, or organization to support the training of residents/students at the clinical training site.

The funding the organization receives from these sources reduces the clinical training expenditures claimed for the grant. Previous MERC grants should not be included.

Examples of clinical education and training support:

- Medicare direct medical education.
- Incurred direct cost on behalf of other organizations.
- Federal or State GME grants or GME support.
- GME donations.
- GME private grants.

Click “?” in the table heading for detailed descriptions.

1. Enter clinical education and training support costs for each of the cost categories.
2. Click “Calculate Totals” to sum cost categories.

MERC Application Instructions

Figure 45

Funding & Support Received

Do **NOT** include MERC Grants.

Trainee Type	FTE Clinical Trainees	Medicare Direct Medical Education	Incurred Direct Cost on Behalf of Other Organizations	Federal GME Grants & Support	State GME Grants & Support	Other GME Support	Total
Medical Residents	13.0	\$ Enter whole	\$ Enter whole dollar c	\$ Enter wh	\$ Enter wh	\$ Enter wh	\$0.00
PharmD Residents	35.0	\$ Enter whole	\$ Enter whole dollar c	\$ Enter wh	\$ Enter wh	\$ Enter wh	\$0.00

2 Calculate Totals


Total Funding & Support Received: \$0.00

Enter in costs - use only whole numbers

Figure 46

Funding & Support Received

(Do not include prior MERC funding)



Financial resources provided by the government, person, or organization to support the training of residents/students at the clinical training site.

Funding the training site receives from other sources reduces the clinical training expenditures claimed.

Examples include:

- Medicare Direct Medical Education
- Incurred direct costs on behalf of other organizations.
- Federal or State GME grants or support.
- GME donations.
- GME private grants.

MERC Application Instructions

Indirect Costs

Indirect costs include costs for activities, goods, or services that benefit more than one project and cannot be traced to a specific program. These costs are often allocated across an entire agency and multiple programs.

In accordance with federal and state requirements, MDH enacts limits on the amount of indirect costs that can be billed to each grant so that, as much as possible, grant funds instead support direct costs related to programmatic activities.

- As much as possible, grant funds should support direct costs.
- Grant applicants cannot submit only indirect costs.
- Operating expenses reported under direct costs must not be duplicated under indirect costs.

Figure 47

Indirect Costs

Costs for activities, goods, or services that benefit more than one project and cannot be traced to a specific program or trainee. These costs are often allocated across an entire agency and multiple programs.

Operating Costs reported under direct operating costs must not be duplicated under indirect costs.

Federally Negotiated Rate Agreement

Facilities claiming a federally negotiated indirect rate must upload a copy of the agreement and report direct costs that must be excluded from the federal rate.

Sites without a Federally Negotiated Rate Agreement

An indirect rate up to 10% of the modified total direct costs may be claimed.

Applicants are responsible for making sure costs are consistently charged to avoid charging the same eligible expense to the grant twice or 'double dipping.'

Applicants must disclose expenses that are included in the indirect portion of the expenses.

Modified total direct costs (MTDC) consists of direct salaries, wages, and fringe benefits. MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of sub-awards that exceeds \$25,000, as applicable.

Indirect Cost Rate

An indirect cost rate is a percentage used to distribute indirect costs to all of an organization's programs that benefit from them.

Applicant cannot claim indirect costs in excess of the indirect cost rate that applies to their organization.

Applicant must submit and retain on-file the corresponding documentation of that indirect cost rate as outlined below:

MERC Application Instructions

No Federally Negotiated Indirect Rate

If the site does **NOT** have a federally negotiated indirect cost rate, the site can claim up to **10%** of the grantee's modified total direct costs.

- Applicants must disclose expenses that are included in the indirect portion of the expenses.
- Modified total direct costs (MTDC) consists of direct salaries, wages, and fringe benefits. MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of sub-awards that exceeds \$25,000, as applicable.
- Applicants are responsible for making sure costs are consistently charged to avoid charging the same eligible expense to the grant twice or 'double dipping.'

Steps for completing this section:

1. Click "NO" if there is not a federally negotiated indirect cost rate agreement.
2. Enter percentage of indirect cost rate claimed. (0 to 10 percent)
3. Provide a list of the indirect expense categories being claimed.

Figure 48

The screenshot shows the 'Indirect Costs' section of an application form. At the top, it asks 'Does site have a federally negotiated indirect cost rate?' with radio buttons for 'YES' and 'NO'. The 'NO' button is selected and circled in red with a '1' in a red circle. A blue callout bubble points to it with the text: 'Click "NO" if site does NOT have a federally negotiated indirect cost rate agreement.' Below this is a field for 'Indirect Cost Rate (cannot be greater than 10% without a federal rate agreement):' with a text input box containing '10' and a '%' sign. This field is circled in red with a '2' in a red circle. A blue callout bubble points to it with the text: 'Site can only enter up to 10% of indirect cost rate'. Below the rate field is a section titled 'No Federal Negotiated Rate' with a blue background. It contains a paragraph of text and a section titled 'List Indirect Expenses Categories' with ten input boxes, each labeled 'Enter Indirect Expense Category'. The first input box is circled in red with a '3' in a red circle. A blue callout bubble points to the list with the text: 'Provide a list of indirect expenses categories.' A mouse cursor is visible near the bottom of the list.

MERC Application Instructions

Federally Negotiated Indirect Rate

If the site **has** a federally negotiated indirect cost rate, the site may claim indirect costs up to, but not exceeding, the federally negotiated indirect cost rate agreement as applied to the grantees modified total direct costs.

- Grantees must submit proof of the federally negotiated indirect cost rate agreement.
- Grantees are responsible for ensuring that the rate is not applied to direct costs that are excluded from the indirect rate.

Steps for completing this section (Figure 49 and 50):

1. Click “Yes” if site is claiming a federally negotiated indirect cost rate.
2. Enter in federally negotiated cost rate percentage.
3. Enter in federally negotiated indirect cost rate cap if applicable.
4. Upload a pdf copy of the federally negotiated indirect cost rate agreement.
5. Click box to certify document uploaded matches the indirect rate being claimed, applicable caps, and applicable exclusion reported.
6. Enter in indirect rate exclusions if applicable – use only whole numbers.
7. Click “Calculate Totals” to sum Federally Negotiated Indirect Rate Exclusion.
8. The amount will total after Step 7.

Figure 49

The screenshot displays the 'Indirect Costs' section of a web application. It features several input fields and callouts:

- Step 1:** A radio button labeled 'YES' is selected, with a callout: 'If site have a federally negotiated indirect cost rate, click the "YES" button'.
- Step 2:** A text input field for 'Indirect Cost Rate (cannot be greater than 10% without a federal rate agreement):' with a callout: 'Enter in federally negotiated cost rate percentage'.
- Step 3:** A text input field for 'Federally Negotiated Indirect Cost Agreement Cap (if applicable):' with a callout: 'Enter in federally negotiated indirect cost rate cap if it is applicable to your training site'.
- Step 4:** A file upload button labeled '+ Select file to upload:' with a callout: 'Upload a pdf copy of the federally negotiated indirect cost rate agreement'.
- Step 5:** A checkbox labeled 'I have verified the expenditures submitted reflect the federally negotiated indirect costs rate agreement and exclusions.' with a callout: 'Click box to certify document uploaded is the federally negotiated indirect cost rate agreement and exclusions'.

Below the input fields is a table with columns for 'Filename', 'Download', and 'Remove'. The table is currently empty, showing 'No data available in table'.

MERC Application Instructions

Figure 50

Federally Negotiated Indirect Rate Exclusions

Federally Negotiated Indirect Rate Exclusions (if applicable, enter total amount of direct costs that are excluded from indirect rate agreement)

Trainee Type	FTE Clinical Trainees	Indirect Rate Exclusions
Advanced Practice Nurses	6.0	\$ Enter whole dollar or 0

6

7 Calculate Totals

8

Total Federally Negotiated Indirect Rate Exclusions: \$0.00

Enter in indirect rate exclusions if applicable to training site - use only whole numbers

Expenditure Summary

Expenditures are summarized in a table.

- Direct Costs (student/resident trainee stipends & benefits, faculty/preceptor stipends & benefits, and operating costs directly related to training MERC eligible trainees)
- Costs Incurred by Teaching Hospital
- Indirect Costs
- Funding and Support Received
- Total Expenditures (less funding and support received)
 - Expenditure per FTE Clinical Trainee (Total Expenditures / FTE Count)

Slight variations may exist when comparing the spreadsheet totals to the application portal totals due to rounding/truncating functions.

Figure 51

Expenditure Summary

Trainee Type	FTE Clinical Trainees	Direct Costs	Costs Incurred by Teaching Hospital	Indirect Costs (No Federal Rate Agreement)	Funding & Support Received	Total Expenditures (less funding & support received)	Total Expenditures per FTE Clinical Trainee
PharmD Residents	4.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

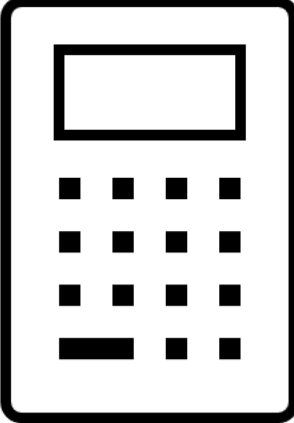
Total Expenditures (less funding & support received): \$0.00

The Expenditure Summary will list each cost categories per Trainee Type and list the Total Expenditures (less funding & support received).

Figure 52

MERC Application Instructions

Total Cost



- + **Direct Costs:** Trainee Stipends, Preceptor Costs, Operating Costs Directly Related to the Trainee.
- + **Cost Incurred by the Teaching Hospital** (for an outlying clinic)
- + **Indirect Costs:** Costs that could not be traced directly to the trainee.
- Subtotal**
- **Less Funding & Support Received**
- Total Clinical Training Expenditures (less funding/support received)**

Clinical Training Cost per Fulltime Equivalent Trainee:
Total Clinical Training Expenditures / (divided by) Trainee Count

Signature of Authorized Representative

DOUBLE CHECK EXPENDITURES BEFORE SUBMITTING. These figures are part of the grant application and can impact the site's grant.

1. When submitting, representative must certify that the information is accurate and complies with all laws related to MERC statute 62J.692.
2. Contact information will auto populate and serve as an electronic signature.
3. Optional "Save" button if user is not ready to sign/submit.
4. Click "Submit Expenditures" to submit the expenditure report to MDH.

Figure 53

Signature of Authorized Representative

I certify that I am an authorized representative approved by the facility named above. I have sufficient knowledge about the facility's MHCP enrollment, identification numbers used for Medicaid billing, and clinical medical education costs. I attest that the training facility hosted clinical trainees in fiscal year 2018. I am aware that the data I provide in the application and expenditure report will be used for grant eligibility and calculations. The data included is accurate and I will comply with all laws related to MERC statute 62J.692.

1

Name: **2**

Title:

Email:

Date Signed:

1) Click box to certify Training Rep whom is authorized to complete this report. 2) Name, Title, Email and Date of Signature will automatically populate once box has been click with Rep's info. 3) Click "Save" to save work. 4) Click "Submit Expenditures" once report is ready to be submitted.

3

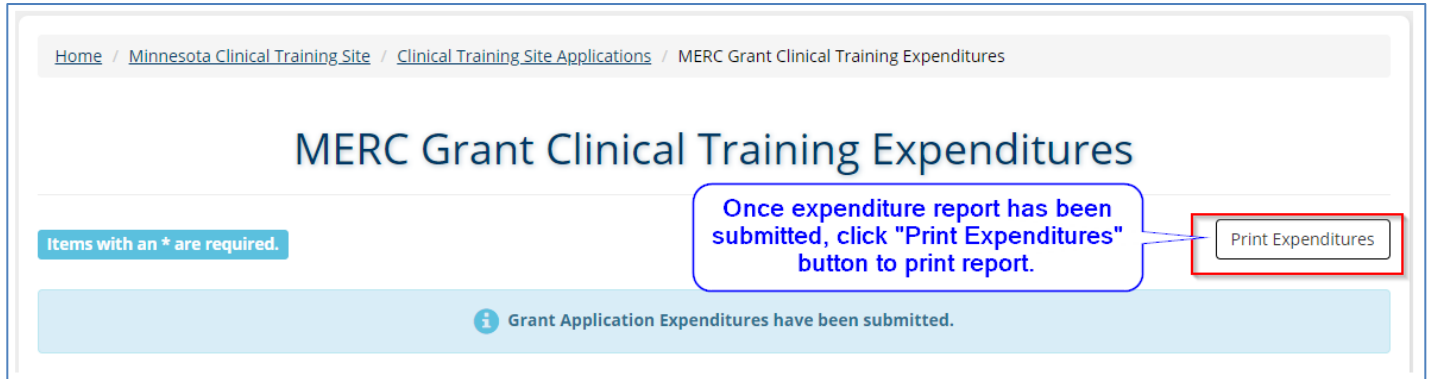
Save Submit Expenditures

MERC Application Instructions

Submit Expenditure

Once expenditures have been successfully submitted, print a copy, and retain for six years.

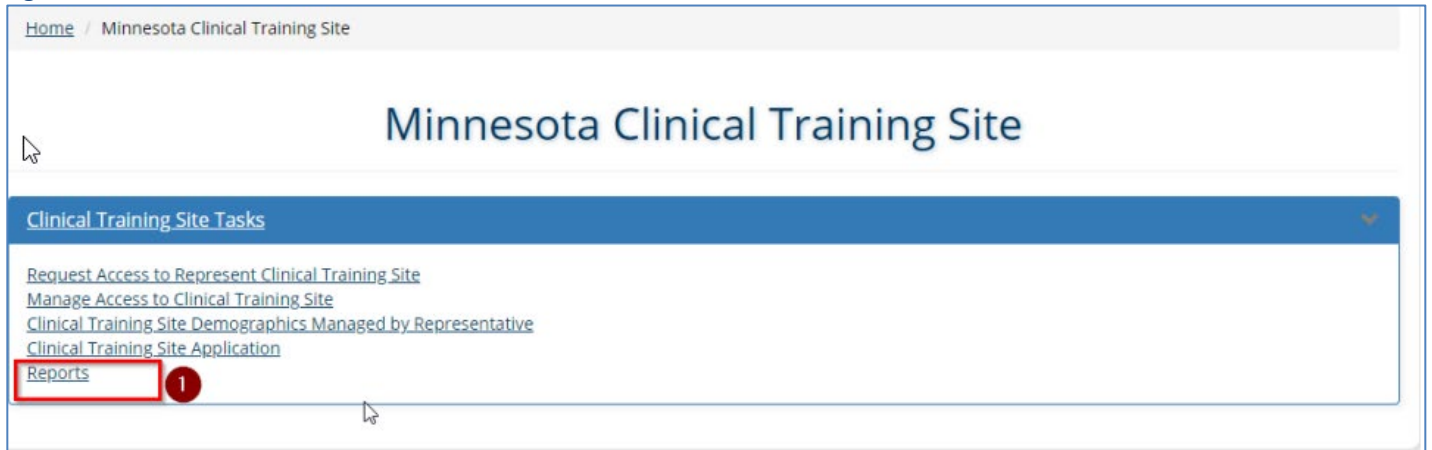
Figure 54



Reports

Once application and expenditures are submitted, representatives can download Excel reports.

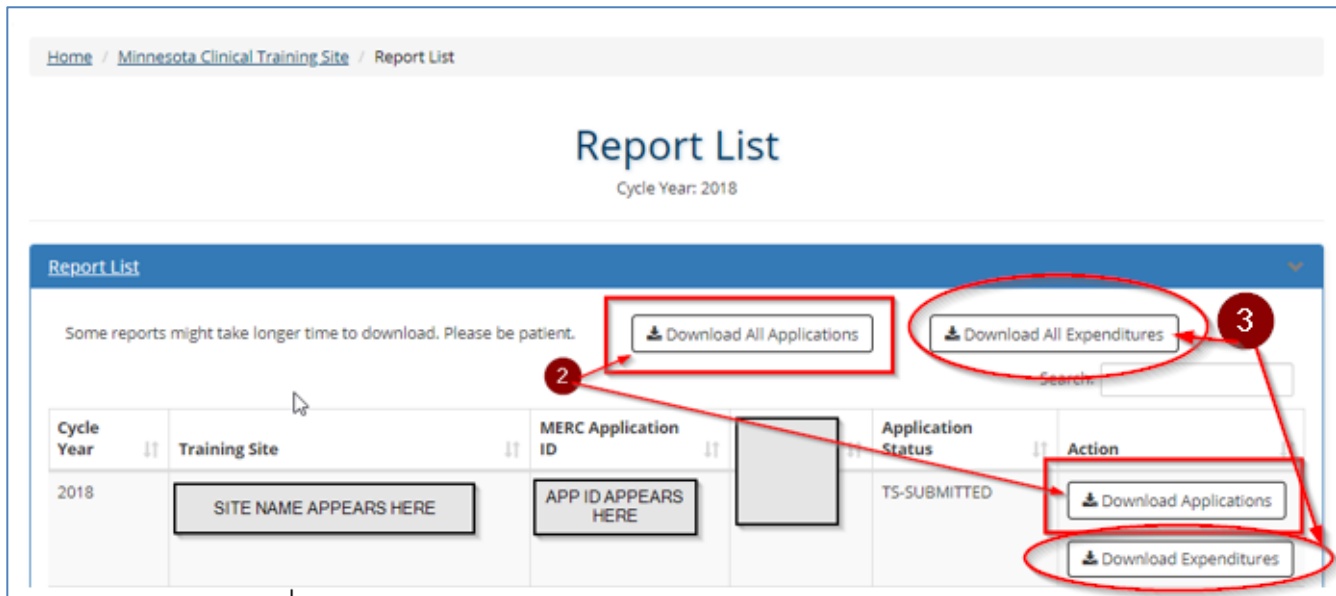
Figure 55



1. Open Reports

Figure 56

MERC Application Instructions



Representatives who manage more than training site have the ability to download information into one Excel report or individual reports.

2. Download the application reports to review the fields currently entered in the application.
3. Download the expenditure report to review the fields currently entered in the expenditure report.

After the grant is finalized, save final reports in the site's grant records.

MERC Application Instructions

Grant Verification Reporting (GVR)

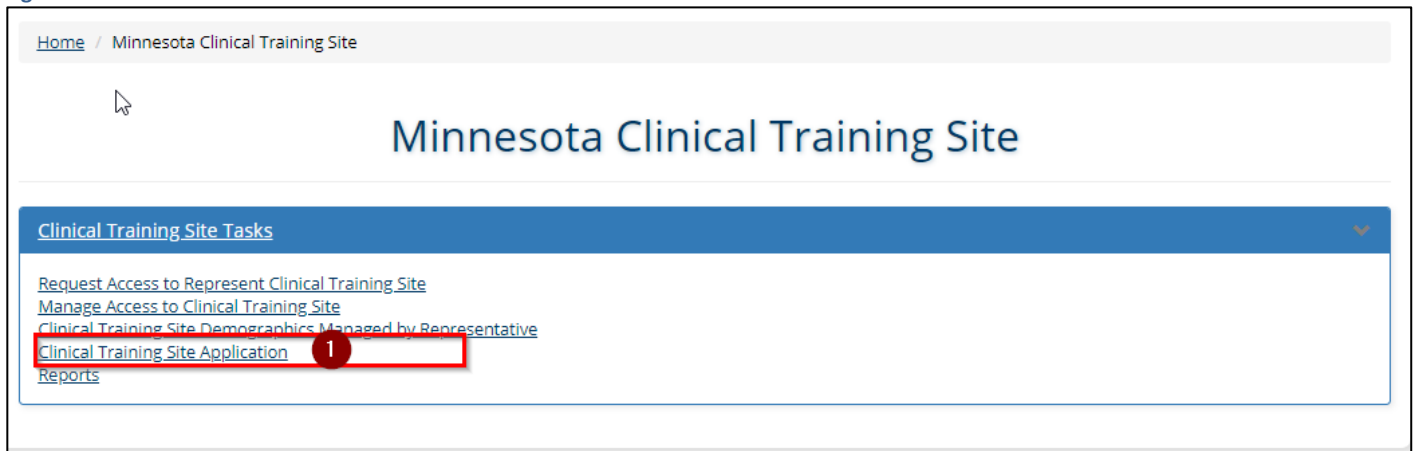
After the grant announcement is made, a GVR will be added to the application portal for sites submitting both Step 1 and Step 2 of the application. The GVR will reflect the grant outcome for qualifying sites and the sponsoring institution(s) that will pass-through reported funding.

The portal will include a separate GVR for recipients of the [Site-Based Clinical Training Grant](#).

Representatives will be notified by May 15, 2025, if the site is required to verify that funding has been received from the sponsoring institution(s). Selected sites must submit the GVR no later than July 15, 2025.

Refer to the steps below to view, print, or submit the GVR.

Figure 57



1. Select, Clinical Training Site Application.

MERC Application Instructions

Figure 58

2. Click on, Grant Verification.
 - a. The Grant Verification Report (GVR) will contain the results of the MERC grant.

Figure 59

MERC Application Instructions

Receiving Grant Payments

If the training site qualified for a grant, funding will be awarded through the sponsoring institution(s) no later than June 30, 2025.

Grant details include: the facility where clinical training took place, the requested payment address, if the site qualified for a grant, the sponsoring institutions and teaching programs of the students/residents, and the total grant from the sponsor, and verification that the sponsor has issued payment to the clinical training site.

Figure 60

Name of Sponsoring Institution

Sponsoring Institution: Sponsoring Institution Name
Funding Verified by Sponsoring Institution: YES
Comments (if any): Comment by Sponsoring Institution

Table with each sponsoring institution an application was submitted through and the anticipated grant payment. After the sponsor issues payment, the payment indicator will say "YES".

Teaching Programs

Teaching Program	Trainee Setting	Fulltime Equivalent (FTE) Clinical Trainee	Grant
Program Name/Type			\$
Program Name/Type			\$

Total FTEs: Total Grant: \$ Overall grant by sponsor

MERC Grant Allocation

Clinical training site grants are calculated using a [formula](#). The grant is then allocated through the sponsoring institutions and teaching programs that had students/residents at the site. This allocation is based on the site's reported clinical training expenditures by trainee type and the percent of trainees within that trainee type at the teaching program.

Verification of Payments

Figure 61

Verification of Grant Funding

Upload an official report from the accounting system showing the grant deposited. Grants must be consistent with the amounts above.

Select file to upload: 3

Cycle Year	Filename	Download	Remove
2018	After the file is uploaded, the document name will appear here. Once the GVR is submitted, the file cannot be removed.	Download	Remove

MERC Application Instructions

3. Upload an official accounting report from the site's accounting system verifying the incoming grant(s) received and deposited from the sponsoring institution(s).
 - a. This step is only required if MDH notifies the site representative by email that the site has been selected for the verification process.

Signature and Submission

Figure 62

The screenshot shows a form titled "Signature of Authorized Representative". At the top, there is a checkbox with the text: "I am an authorized representative for the facility named above. I certify that the MERC grant specified has been received and deposited. I have attached the requested proof of deposit as required." Below this are four input fields labeled "Name:", "Title:", "Email:", and "Date Signed:". At the bottom right of the form area, there is a green "Save" button. A red box highlights the "Save" button, and a callout bubble points to it with the text: "Optional SAVE button. If user signs, SAVE button will disappear and Submit button will appear."

Figure 63

This screenshot shows the same form as Figure 62, but with the checkbox checked. A red circle with the number "4" is around the checked checkbox. A red arrow points from the checkbox to the "Submit Verification" button at the bottom right, which is also circled in red with a red circle containing the number "5". A callout bubble points to the "Submit Verification" button with the text: "When box is checked, user can submit grant verification."

Do not sign the grant verification until you are ready to submit.

4. Sign the GVR.

MERC Application Instructions

- a. This step is only required if MDH notifies the site representative by email that the site has been selected for the verification process.
 - b. Click the box to populate the e-signature fields.
5. Submit the Grant Verification to MDH.
- a. Return to the top of the document to print/save the GVR for your records.
 - b. Return to the main clinical training site page and run a final report of the application for your records. The reports will now reflect the final submission of the GVR.

The grant cycle is complete.

Printing

The document can be printed and saved by clicking Print Verification. This button is found at the top of the screen. Retain a final copy for the grantee's records.