Completing the RWHAP Part B and Part B Supplemental Program Terms Report (PTR)

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RWHAP
DATA SUPPORT

Outline

Background

Accessing the PTR

Grantee Contract Management System (GCMS)

Completing the PTR

Technical Assistance Resources

Question and Answer Session

Let's begin by going over the outline for today's presentation. We'll start off with a little background information. After that, we'll go through the step-by-step instructions on how to access the report. We'll briefly go over the Grantee Contract Management System (or GCMS) and then review how to complete the various sections of the PTR. Finally, we'll close out the presentation by looking at some additional Technical Assistance resources and wrap up by answering any questions you might have.

2023 RWHAP Part B and RWHAP Part B Supplemental PTR Manuals

- Available now on the TargetHIV website here

RWHAP Part B Program Terms Report
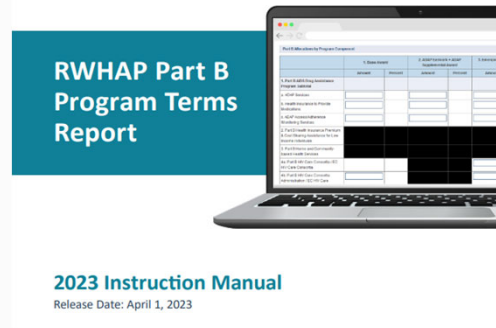
2023 Instruction Manual
Release Date: April 1, 2023

Before we start, I do want to take a moment to point out that while we are presenting both the Part B and Part B Supplemental report in one webinar, they each have their own manuals.

The 2023 Part B PTR manual is available now on the TargetHIV website. It reviews all the changes that were made for the 2023 report and contains all of the PTR instructions that I'll be presenting today.

The Part B Supplemental PTR (which is not pictured here) will be updated and posted to TargetHIV before the report opens later this year.

Background
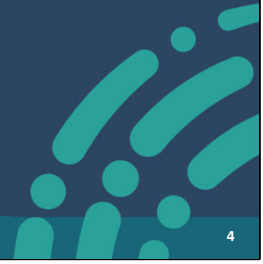
Let's get started with some background information.

Background

- All RWHAP Part B (X07) and Part B Supplemental (X08) recipients are expected to complete a PTR

- Recipients report on the allocation of their RWHAP Part B awards

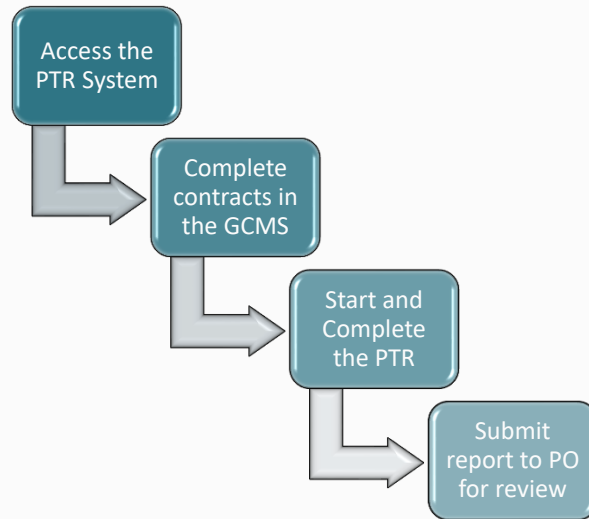- The PTR is accessed and submitted in the HRSA Electronic Handbooks (EHBs)

All Part B and Part B supplemental recipients are required to complete a PTR each year. The PTR is where RWHAP Part B recipients report on the allocations of their grant funding for the budget year. Much like many of the other reports you submit for your Part B award, it is accessed through the HRSA Electronic Handbook System (commonly referred to as the EHBs).

The manuals referenced on the previous slide will be essential resources for you to use while completing the PTRs; therefore, I recommend downloading and reviewing them before you start working on your reports.

Please note that the reporting for the 2023 Part B (X07) PTR is now open in the EHBs. The report is due June 30, 2023.

Reporting for the 2023 Part B (X08) Supplemental PTR will open in the EHBs later this year.

PTR Submission Process

- Access the PTR System
- Complete contracts in the GCMS
- Start and Complete the PTR
- Submit report to PO for review

Here is a quick overview of the PTR submission process. A recipient must complete a PTR for their Part B Base (X07) and Part B Supplemental (X08) award. Furthermore, you must complete a separate PTR for each grant you receive. These reports serve as a reference for how recipients will allocate their grant funding.

You'll start by accessing the PTR in the EHBs. Next, you'll complete your contracts in the GCMS. After that, you'll start and complete the PTR, and, finally, you'll validate and submit the PTR to your project officer for review.

We're going to review all these steps more in-depth on the upcoming slides.

I also wanted to point out that the instructions I'm presenting today are applicable for both the Part B and Part B Supplemental PTR. I'll point out the differences between the two reports as we go through the presentation.

Accessing the PTR

Let's go over the specific steps you will take for accessing the PTR.

Accessing the EHBs

- The PTR is accessed and submitted through the PTR Web Application in the HRSA EHBs

- You must have an account with the appropriate permissions for your agency's RWAP Part B award in order to access and complete the PTR

- For further assistance with your EHBs account, contact the EHBs Customer Support Center

In order to access the EHBs, you'll have to make sure your account is set up and ready to go with all the necessary permissions for your agency's Part B and/or Part B Supplemental awards to be able to access and complete the PTR. This is more so applicable for new users.

If you need any assistance with logging into the EHBs or have permission issues, your best resource is the EHBs Customer Support Center. I'm going to go over their contact information at the end of the presentation.
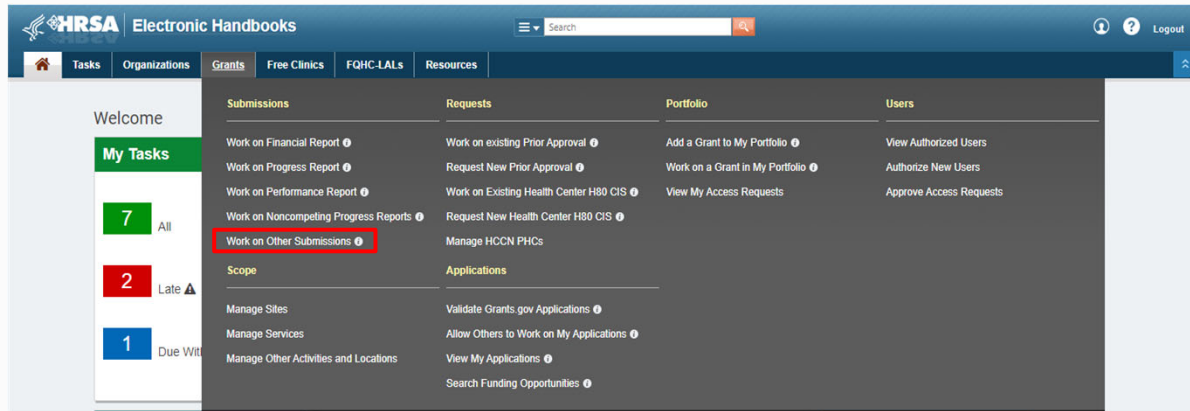
Grants Tab
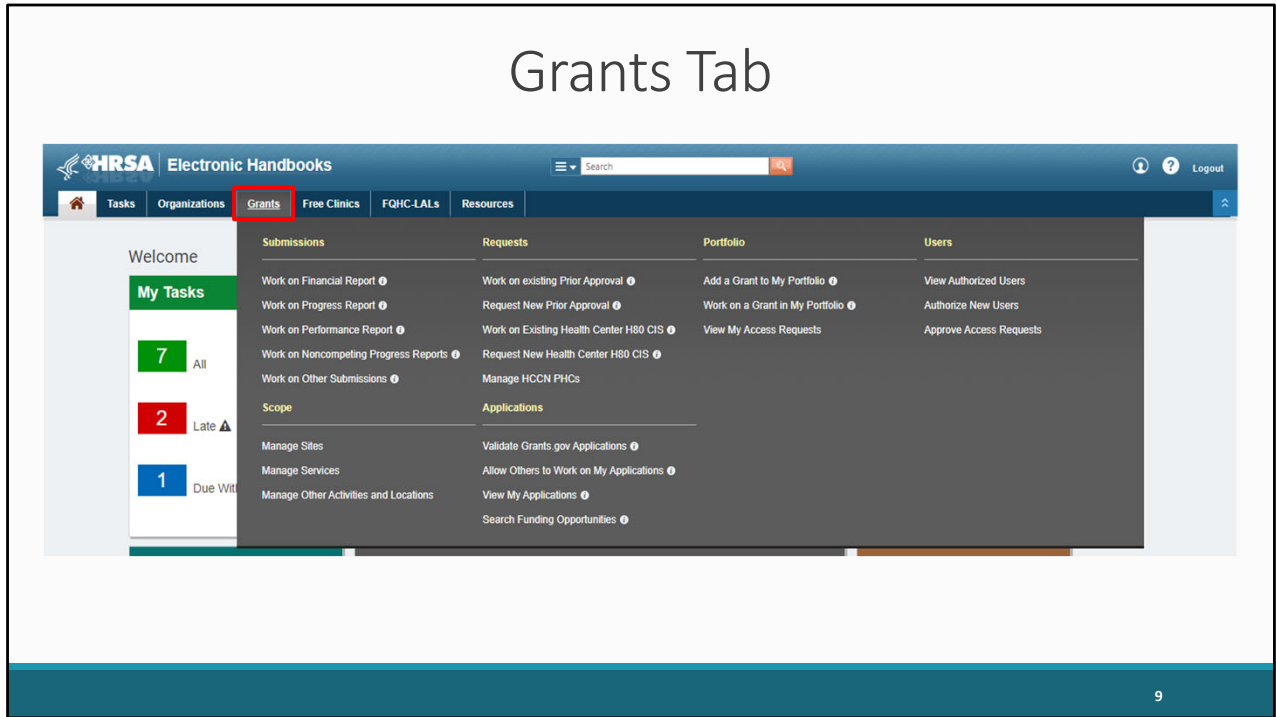
After logging into the EHBs, you will see several tabs at the top of the screen, one of which is the 'Grants' tab. Start by hovering your mouse over the Grants tab.

Work on Other Submissions

From here, a drop-down menu will appear, and you will click on Work On Other Submissions under the Submissions header.

Submissions All Page

After clicking on the "Work on Other Submissions" link, you will be navigated to the Submissions-All page, where you will see a list of submissions for your organization in the Submission Name column. You may have to scroll down a bit to locate your 2023 PTR in the list of submissions which should be close to the top of the list.

Under the "Options" column, select "Start" or "Edit." The first time the report is accessed the link will read "Start," but once the report has been started, the link will instead read "Edit."

PTR Inbox

Once you click on either the "Start" or "Edit" link, you will be taken to the PTR inbox. I'd like to point out a couple of important links on this page.

You will access the GCMS from within the report inbox.

Under the Manage Contracts heading, You can access the GCMS, by selecting the "Search Contracts" link in the Navigation panel on the left side of the screen.

The other noteworthy link on this page is under the Action column. You can access the PTR itself by selecting the envelope icon.

Grantee Contract Management System (GCMS)

We just went through the steps for accessing the PTR. Before we dive into the steps for completing the report, I would like to briefly discuss the GCMS.

What is the GCMS?

- A data storage system for RWHAP contract information

- Multiple reports utilize the GCMS helping to decrease data entry burden

- The PTR automatically imports contract information from the GCMS

Contract

GCMS

Contract

PTR
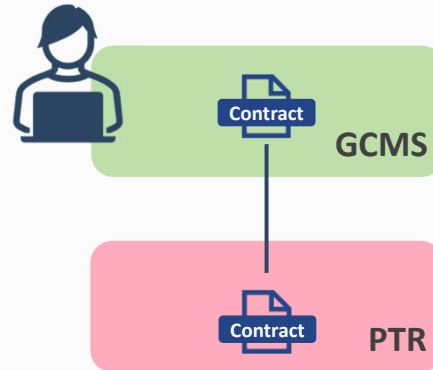
The GCMS is a data storage system for RWHAP contract information. Its purpose is to decrease the data entry burden on recipients as the information entered there is used for multiple reports. Your Part B contract information, for instance, is also used for the RWHAP Services Report (RSR) thereby eliminating the need to re-enter all of your contract information for that report.

Here's how it works. Recipients enter their contracts into the GCMS, with a separate contract for each agency funded to provide services. Then, the PTR automatically looks in the GCMS for any contracts that overlap the report's budget period and pulls the contracts into the report. In other words, any of your contracts that touch the report period, will be pulled into the report – in this case, the PTR.

PTR and the GCMS

- Contracts are typically added to the GCMS during completion of the PTR
- Recipients must have a contract in the GCMS for each organization funded to provide services with their RWHAP Part B and Part B Supplemental award
- Contract dates should align with the dates of your budget period
- Don't overwrite the prior years' contracts as they <u>must</u> be preserved
- If you copy the prior year's contract, you must review and update the information accordingly

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Typically, recipients will add their contracts to the GCMS during the completion of the PTR.

For the PTR, you'll need to make sure that you have a contract for each organization that is funded to provide services with your Part B award. This includes your own organization if your agency provides services.

Your agency's contracts in the GCMS should align with the dates of your budget period, so for Part B that would be from April to March. You should not have a contract that exceeds 12 months.

Also, prior years' contracts need to be preserved. Each provider must have a separate contract for each year that they're funded. We've seen a number of recipients do this incorrectly.

While you are encouraged to use the 'copy contract' feature in the system, you cannot simply copy the prior years' contracts and just update the dates. It's important you review an update all the information accordingly.

Finally, I wanted to share a tip with you since we are frequently asked this question at Data Support. If you want to know the name of the staff person who previously created a

contract, once you open the contract, scroll down to the bottom of the Edit Contract Details page, and, below Q9, you'll see the name of the person who created the contract as well as the name of the person who last modified the contract.

Additional GCMS Resources

- For additional assistance entering contracts in the GCMS, please see the GCMS Manual and the Completing the GCMS webinar available on the TargetHIV website.

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We have some additional materials available that walk you through the whole process including the GCMS Manual and the Completing the GCMS webinar. These resources are available on the TargetHIV website and provide a step-by-step process of accessing, adding, editing, and deleting contracts into the GCMS. Again, for more detailed information on the GCMS, please review the GCMS instruction manual.

Completing the PTR

Let's go over the process for completing the PTR.

I would like to point out that for today's presentation I will be using the Part B report as an example for completing and submitting the PTR; however, I plan on pointing out the differences between the Part B and Part B Supplemental PTR in the upcoming slides.

Let's take a moment to highlight one of the most important parts of the EHBs - the Navigation panel. This is your report roadmap. The Navigation panel is always displayed on the left side of the screen. It is used to navigate the PTR report, the PTR system, and it's how you'll complete all the report actions.

Up at the top you can use the "PTR/Allocations Report Inbox" link to get back to the PTR inbox at any time.

As previously discussed, you can access the GCMS by selecting the "Search Contracts" link under the *Manage Contracts* heading.

The next section, Navigation, is where you'll find links for each section of the PTR.

Also, under the *References* heading, you can find the links for both the Validation Rules document and the Part B and Part B Supplemental PTR Instructions.

In the *Actions* section, you'll find the links for both validating and submitting the PTR.

Finally, down towards the bottom, we have options for printing and exporting both the CLC Report and the Allocations Report which you'll need for the separate Program Submission.

PTR Inbox

Back in the PTR inbox, we'll now open the report by selecting the envelope icon under the 'Action' column. This is a repeat of a step that I showed you earlier when we were discussing how to access the PTR.

Recipient Information

After clicking on the envelope icon, you will be navigated to the first section of the report, which is the Recipient Information section. The information in the Official Mailing Address section prepopulates from information listed in the HRSA EHBs, so please make sure to review it for accuracy and make any edits if necessary.

Recipient Information, cont.

Further down the page, you will see the Organization Identification section. Specifically, there are fields displaying the recipient's EIN and the Unique Entity Identifier, also known as UEI number. This information is also prepopulated.

On this page you will also see the contact information for the person responsible for the submission. This information is important as we'll need to know who to reach out to in case there are questions on your report. Please review the information to ensure its accurate and please update any information if needed.

Finally, please make sure to save your entries in this section by selecting the "Save" button on the bottom right of the screen.

Now let's move on to the next section, which is the File Upload section.

File Upload

The File Upload section shown on the screen is for an X07 Part B report. However, the X08 Part B Supplemental section functions in much the same way.

You'll notice there are two different parts to this section. In the first table, File Upload , there are links to a few different helpful documents for your PTR submission. You can review these documents by selecting View under the Action column.

The second part of the page, Submission Components, is for uploading required documents. Here, you can upload Primary Documents and Supplemental Documents.

Under Primary Documents, you can access document templates required for your submission. For each one here, you can select the "Download Template" link to access a template for the required document. You'll need to save the document somewhere on your computer where you can easily access and complete it. Once you are ready to upload it, you can select the "Upload" link on the right under the Action column.

To upload additional documents that don't require a template, you can look under Supplemental Documents and select the "Upload Supplemental Document" button listed at the bottom of the page.

With that said, next, I'd like to go over the list of Part B required documents.

File Upload Required Forms

RWHAP Part B PTR	RWHAP Part B Supplemental PTR
• SF-424A • Budget Narrative Spreadsheet • Implementation Plan • Contract Review Certification (CRC) • Early Identification of Individuals with HIV/AIDS (EIIHA) Plan	• SF-424A • Budget Narrative Spreadsheet • Implementation Plan • CRC

Here are the required document uploads for each report. For the Part B PTR, there is the SF-424A, Budget Narrative Spreadsheet, Implementation Plan, Contract Review Certification or CRC, and the Early Identification of Individuals with HIV/AIDS or EIIHA Plan. The EIIHA Plan does not have a template and will need to be uploaded as a separate document.

The Part B Supplemental PTR will require that you upload all those same documents except for the EIIHA Plan.

If you have any questions about the required documents for your PTR submission, please contact your project officer.

CLC Report

Program Terms Report

Your session will expire in: **29:55**

▼ X07HA00000 : State Health Department

Consolidated List of Contractors

Review the list of your organization's contracts for the fiscal year. If a contract is missing, look for the missing contract by selecting the "Search Contracts" link under the Manage Contracts heading in the left menu.

Warning	Id	Funded By	Organization	Reference	Start	End	Services	Funded Through	Is Executed	Amount
+	123456	X07HA00000	State Health Dept.		4/1/2023	3/31/2024	2		Yes	$100.00

For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the HRSA Electronic Handbooks Contact Center help request form to submit your question online.
For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to RyanWhiteDataSupport@wrma.com.

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The next section for the PTR that we will discuss is the CLC or Consolidated List of Contractors Report. The CLC Report pulls information directly from the GCMS. It will pull in every contract that overlaps with the budget period and list it here. In this example, the recipient has only one provider listed.

Review the CLC Report for accuracy and completeness, by double checking the contract dates, funding amounts, and funded services. You can select the expansion button to view the services for each provider. All agencies funded to provide services with your Part B award (including your own organization if it provides services) should have a contract in the GCMS and should be listed in the CLC Report. The contract dates should align with your budget year to prevent future reporting issues.

Again, if you need any assistance with updating your contracts in the GCMS, we recommend reviewing the GCMS instruction manual and/or reaching out to Data Support for further assistance.

Synchronizing Banner

Program Terms Report

Your session will expire in: 29:50

NAVIGATION

Inbox
- PTR/Allocations Report Inbox

Manage Contracts
- Search Contracts

Navigation
- Recipient Information
- File Upload
- CLC Report
- Allocations Report

References
- Validation Rules
- Guidance

Actions

Warning:
The program information displayed below does not match the program information in the Grantee Contract Management system (GCMS). Click the provider name listed in blue font below or select the icon in the "Warning" column below to review the updates for each provider and, if correct, synchronize the information. To synchronize program information across all providers, click the "Synchronize All" button. Please note that the synchronization process updates data for both the CLC Report and Allocation Report.
Health and Happiness Clinic (Added)

Synchronize All

▼ **X07HA00000 : State Health Department**

Report ID: 123456   Status: Working   Due Date: 6/30/2023 11:59:58 PM
Budget Year: 4/1/2023 -3/31/2024   Last Modified Date: 4/15/2023 2:32:20 PM   Last Modified By: user@statehealth.gov
Access Mode: ReadWrite   UEI: AB1C23DEF4G

Consolidated List of Contractors

Review the list of your organization's contracts for the fiscal year. If a contract is missing, look for the missing contract by selecting the "Search Contracts" link under the Manage Contracts heading in the left menu.

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If you go into the GCMS to add or edit contracts after you have already started the PTR, you'll need to synchronize the report. You'll know that the report has to be synchronized by the yellow warning banner at the top of the page. The message in this banner lets you know that changes were made to the GCMS that need to be synchronized with your report. If you skip this step, your contract updates will not be reflected in your report, so please make sure to synchronize before you submit your report.

As shown on the slide, a contract was modified to add an additional service. To synchronize the changes, we'll select the "Synchronize All" button in the yellow banner.

Synchronize Contracts

After clicking on "Synchronize All", you will be taken to the synchronize contracts page, where you can review the changes to make sure that they are accurate. We see here a contract was modified in the GCMS to include a new RWHAP funded service. Since the update looks correct, I'll go ahead and click the "Synchronize" button to finish adding those changes to the report.

So, remember, if you make changes in the GCMS **after** you have started your PTR, you'll have to synchronize the changes. Don't be afraid to click that button.

Let's move on to the last section of the PTR, which is the Allocations Report. The sections displayed here are for the Part B PTR. I will go over the Part B report first and then we will review the allocation sections for the Part B Supplemental report.

You can navigate to the Allocations Report section by selecting "Allocations Report" in the Navigation panel. The first section of the report is displayed – the Budget Year Award Information.

Beginning with the Award information, this component is for your total award amounts. In each box here, you'll enter the specified total award amount, which includes your Part B base award, ADAP Earmark Award, the ADAP Supplemental Award, the Emerging Communities Award (EC) and the Minority AIDS Initiative (MAI) Funding Amount.

Please note that every editable field in the Award Amount column requires a response and only whole number values are allowed. If you don't receive an award type or don't have any allocations to report for a specific category, enter a "0."

You'll notice that rows 4 , 6 , and 8 do not require a response. These cells will automatically calculate once you have entered and saved the values for each of these fields.

One thing I'll also add is that you should not report values for carryover funding in this report or in the GCMS.

Part B Allocation by Program Component

Part B Allocations by Program Component

	1. Base Award		2. ADAP Earmark + ADAP Supplemental Award		3. Emerging Communities (EC) Award		4. Total	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
1. Part B AIDS Drug Assistance Program Subtotal								
a. ADAP Services	☐		☐		☐			
b. Health Insurance to Provide Medications	☐		☐		☐			
c. ADAP Access/Adherence /Monitoring Services	☐		☐		☐			
⭐ 2. Part B Health Insurance Premium & Cost Sharing Assistance for Low Income Individuals	■	■	■	■	■	■	■	■
⭐ 3. Part B Home and Community-based Health Services	■	■	■	■	■	■	■	■

The next section of the Allocations Report is the Allocations by Program Component section. When you're in the system, all of the sections I'm going to go through will be on the same screen. However, I'm breaking the screen up over the next several slides to ensure the screenshots are legible. We're going to start at the top part of the table with questions 1-3.

There are three editable columns here: Base Award, ADAP Earmark + ADAP Supplemental Award, and EC Award. In each of the editable column fields, you'll enter the allocation amounts that corresponds with each service listed on the left.

The first three rows all pertain to ADAP: 1a. ADAP Services, 1b. Health Insurance to Provide Medications, and 1c. ADAP Access/Adherence/Monitoring Services.   You will need to complete these rows for each of the three corresponding columns.

So basically, if you see a box within the cell, it means that you need to enter a value in that cell. If the cell does not contain a box, the value will be calculated once you save the information on the screen.

For those of you who worked on the PTR last year, you may notice a change for #2 and #3. The yellow stars denote a report change for the 2023 Part B (X07) PTR.

For the 2023 report, please note you no longer have to complete 2. Health Insurance Premium & Cost Sharing Assistance for Low Income Individuals and 3. Home and Community-based Health Services as these cells are blacked out. Recipients should enter allocations for these service categories in their contracts in the GCMS.

Please note that if you have any questions on the specific service categories, you can refer to PCN-16-02 for detailed service definitions. You can also contact Data Support.

Finally, please note that the remining fields on this screen will be automatically populated after you save the information on the page.

Part B Allocations by Program Component

	1. Base Award		2. ADAP Earmark + ADAP Supplemental Award		3. Emerging Communities (EC) Award		4. Total	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
4a. Part B HIV Care Consortia / EC HIV Care Consortia			■	■				
4b. Part B HIV Care Consortia Administration / EC HIV Care Consortia Administration			■	■				★
✦ 4c. Part B HIV Care Consortia Planning & Evaluation / EC HIV Care Consortia Planning & Evaluation			■	■				★
✦ 4d. Part B HIV Care Consortia CQM / EC HIV Care Consortia CQM			■	■				★
5. Part B Emerging Community Services	■	■	■	■				
6. Part B State Direct Services			■	■	■	■		
7. Part B Clinical Quality Management								★
8. Part B Recipient Planning & Evaluation Activities								★
9. Recipient Administration								★
10. Column Totals								★
11. Total Part B X07 Allocations								

Part B Allocations by Program Component, cont.

Again, this is a continuation of the same table on the previous slide, but we're continuing on with rows 4-11 in the Part B Allocations by Program Component section.

Row 4a is for HIV care consortia with just one field to complete for the EC Award.

Row 4b is for HIV care consortia administration with two fields to complete for the Base Award and EC.

Row 4c as noted by the yellow star, is a brand-new row for HIV care consortia planning and evaluation with two fields to complete.

Row 4d is also brand-new for consortia clinical quality management (CQM) with two fields to complete.

Row 7 is for CQM and you'll have three fields to complete.

Row 8 is recipient planning and evaluation activities also with three fields to complete.

And finally, Row 9 is for recipient administration with three fields to complete.

Please remember again that 4c and 4d are new.

Finally, the totals for Row 10 and 11 will be calculated once you save the information on the page. Likewise, column percentages and amounts will be calculated once you save the information.

Also, the percent cells in the Total column that contain a yellow star have been blacked out for the 2023 report.

Breakdown for Consortia, State Direct Services and Emerging Communities

Service	1. Consortia		2. Direct Services		3. Emerging Communities		4. Total	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
Core Medical Services								
a. AIDS Drug Assistance Program Treatments	$0	0.00 %	■■■■	■■■■	■■■■	■■■■	$0	0.00 %
b. AIDS Pharmaceutical Assistance	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
c. Early Intervention Services (EIS)	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
d. Health Insurance Premium and Cost Sharing Assistance for Low-Income Individuals	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Home and Community-Based Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Home Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
g. Hospice	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
h. Medical Case Management, including Treatment Adherence Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
i. Medical Nutrition Therapy	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Mental Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Oral Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
l. Outpatient/Ambulatory Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
m. Substance Abuse Outpatient Care	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
1. Core Medical Services Allocation Subtotal	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %

Core Medical Services

The next section of the Allocations Report, contains the Breakdown for Consortia, State Direct Services, and EC.

All of the core medical services information from this table is going to populate from the GCMS. So, if a value here isn't correct, you'll have to make changes to the corresponding contract(s) in the GCMS.

You'll notice that the amount and percent cells for Row A, ADAP Treatments, in the Direct Services and EC columns have been blacked out. Funds for these services from those sources cannot be entered into their respective contracts. This is a 2023 change as noted by the yellow star.

Those who are familiar with last year's report may notice that the amount and percent cells in row d and row e are no longer blacked out. Beginning with the 2023 Part B PTR, recipients must enter allocation amounts for Health Insurance Premium and Cost Sharing Assistance for Low-income Individuals and Home and Community-based Health Services into their contracts in the GCMS. These cells will pull in values entered for these service categories from the contracts in the GCMS. Previously, these values were entered into the Part B Allocations by Program Component table, but now you will enter the information in the GCMS.

Support Services								
a. Child Care Services	$5	50.00 %	$5	7.14 %	$5	83.33 %	$15	17.44 %
b. Emergency Financial Assistance	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
c. Ending the HIV Epidemic Initiative Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
d. Food Bank/Home Delivered Meals	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Health Education/Risk Reduction	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Housing	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
g. Linguistic Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
h. Medical Transportation	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
i. Non-Medical Case Management Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Other Professional Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Outreach Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
l. Psychosocial Support Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
m. Referral for Health Care and Support Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
n. Rehabilitation Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
o. Respite Care	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
p. Substance Abuse Services (residential)	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
2. Support Services Allocation Subtotal	$5	50.00 %	$5	7.14 %	$5	83.33 %	$15	17.44 %
3. Services Allocation Total	$10	100.00 %	$70	100.00 %	$6	100.00 %	$86	100.00 %

Support Services

Continuing on with the Breakdown for Consortia, State Direct Services and EC section, below the Core Medical section you will see a table that displays the Support Services information.

Like the core medical services section on the previous screen, all of the support service information from this table is populated from the GCMS. So, if a value here isn't correct, you'll have to make changes to the corresponding contract(s) in the GCMS.

MAI Allocations by Program Component

MAI Allocations by Program Component

	MAI Award Amount	MAI Award Percentage
1. Education to increase minority participation in ADAP		
2. Outreach to increase minority participation in ADAP		
3. Clinical Quality Management		⚫
4. Recipient Planning & Evaluation Activities		⚫
5. Recipient Administration		⚫
6. Total MAI Allocations		⚫

Next, we will cover the MAI Allocations by Program Component section of the Allocation Report. This is specifically for your MAI Award funding.

Just to clarify, MAI Award funding is not entered in the contracts in the GCMS. Therefore, you will enter the funding into this table for questions 1-5 which collects funding amounts for MAI education, outreach, CQM, planning and evaluation, and administration.

Row 6, Total MAI Allocations, will populate once you save the information on the page.

Please also note that the percent cells have been blacked out for rows 3, 4, 5, and 6. This is another change for the 2023 report.

Core Medical Services Requirement Waiver

MAI Allocations by Program Component		
	MAI Award Amount	**MAI Award Percentage**
1. Education to increase minority participation in ADAP		
2. Outreach to increase minority participation in ADAP		
3. Clinical Quality Management		
4. Recipient Planning & Evaluation Activities		
5. Recipient Administration		
6. Total MAI Allocations		

☐ Recipient received waiver for 75% core medical services requirement.

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Directly below the MAI Allocations by Program Component table, you'll see a checkbox that you should select if your agency received a waiver for the 75 percent core medical services requirement. You'll receive a validation message on your report if you do not select the waiver checkbox and have not met the 75 percent core medical services requirement based on the allocations entered.

If you're unsure if your organization received a waiver, please contact your project officer for further assistance.

Please be sure to save your report once you have completed all the required components of the Part B Allocations report.

Legislative Requirements Checklist

Legislative Requirements Checklist		
Core Medical Services Allocations	**Amount**	**Percent**
ADAP	$25,000	29.41 %
State-Direct Services: Core Medical Services	$48,000	56.47 %
Emerging Communities: Core Medical Services	$0	0.00 %
Total Core Medical Service Allocations	**$73,000**	**85.88 %**
Support Services Allocations	**Amount**	**Percent**
Consortia Services	$0	0.00 %
Consortia EC Services	$0	0.00 %
State-Direct Services: Support Services	$10,000	11.76 %
Emerging Communities: Support Services	$0	0.00 %
MAI Allocations for Education + Outreach Services	$2,000	2.35 %
Total Support Services Allocations	**$12,000**	**14.12 %**
Total Services Allocations	**$85,000**	**100.00 %**

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The last section of the Allocations Report is new for 2023. The Legislative Requirements Checklist, is a great reference. The percentages in the table are populated from the prior tables.

The total amounts and percentages for your Core Medical Services Allocations and the Support Services Allocations are displayed on the screen.

Make sure you review the information on this page to ensure you're the data look correct. On this screen, you can check to make sure that your agency is in compliance with the 75% core medical services requirement (unless you have received a waiver as we previously discussed). You can see in this example that this agency has met the 75% core medical requirement as they have spent 85.88% of their Part B allocation on core medical services.

Legislative Requirements Checklist (cont.)

CLINICAL QUALITY MANAGEMENT	Allocations	Amount	
Total Clinical Quality Management Allocations must be 5% of the total X07 award or $3 million (whichever is smaller.)	Capped Amount	$5,000	
To the right, is the maximum (Capped Amount) that may be allocated to Clinical Quality Management as well as the amount of Current Fiscal Year dollars allocated (CQM Allocations) on Clinical Quality Management. Please check to make sure the Allocations do not exceed the Capped Amount.	CQM Allocations	$3,000	

PLANNING AND EVALAUTION / RECIPIENT ADMINISTRATION	Allocations	Amount	Percent
Total Part B X07 Planning and Evaluation Allocations and total Recipient Administration Allocations must each be 10% or less than the total X07 award. Planning and Evaluation and Recipient Administration do not necessarily need to be 10% of each funding stream as long as the combined total of each is 10% or less of the total X07 award. In addition, Planning and Evaluation and Recipient Administration Allocations combined must not exceed 15% of the total X07 award.	Planning & Evaluation	$5,000	5.00 %
	Recipient Administration	$7,000	7.00 %
To the right, is the percentage of Planning and Evaluation Allocations divided by the Total X07 award and Recipient Administration Allocation divided by the Total X07 award. Please check to make sure these percentages are not greater than 10%. Also shown is the percentage of the combined Planning and Evaluation and Recipient Administration Allocations divided by the Total X07 Award.	Planning & Evaluation + Recipient Administration	$12,000	12.00 %

Cancel   Save

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The next few sections of the checklist display the CQM and the Planning and Evaluation/Recipient Administration requirements. The fields here will automatically calculate once you have clicked on save at the bottom of the page. Once updated, please review the CQM calculations to ensure it does not exceed the capped amount listed in the first row of the table. Also, please ensure the allocations listed in the Planning and Evaluation/Recipient Administration section are accurate and meet the requirements outlined in the text.

For example, the total Part B Planning & Evaluation allocations and the total Recipient Administration allocations must each be 10% or less than the total award. In this table, we see that the recipient has met this requirement as their award amounts for each allocation type is under 10%.

Now that you've verified you meet the legislative requirements and completed each section of the report, you're ready to move on to validating your report.

Before we go over the steps for validating the report, I'd like to go over the Allocations Report sections for the Part B **Supplemental** PTR which is much simpler than the Part B PTR.

The Allocations Report page for the Part B Supplemental PTR has 10 editable fields that you must complete using your agency's final NoA. All editable fields must have a whole number value as a response. If you don't allocate funding to a specific area, enter "0."

At the top of the Allocation Report screen, you'll see only one award type which is your total Part B Supplemental award.

Below the award information, there is the second section which is the Funding by Program Component section. There is one award type, so you just have one column to enter any funding amounts. These rows are much the same as what is seen in the Part B PTR.

Rows 1a, 1b, and 1c, again are all for ADAP including ADAP services, health insurance, and access/adherence/monitoring services.

Row 2 is for Health Insurance Premium and Cost Sharing Assistance and Row 3 is for Home and Community Based Health Services. You'll still enter values for those services in this

table in the Part B Supplemental PTR.

Row 4b is for consortia administration and just like the Part B PTR the last three rows are for CQM, planning and evaluation, and recipient administration.

Once you've entered a response for all the required fields on this page, make sure to select "Save" which will be displayed at the bottom right of the screen.

Breakdown for Consortia and State Direct Services Final Funding

Service	Consortia		Direct Services		Combined Total	
	Amount	Percent	Amount	Percent	Amount	Percent
Core Medical Services						
a. AIDS Drug Assistance Program Treatments	$0	0.00 %	$0	0.00 %	$0	0.00 %
b. AIDS Pharmaceutical Assistance	$0	0.00 %	$0	0.00 %	$0	0.00 %
c. Early Intervention Services (EIS)	$0	0.00 %	$0	0.00 %	$0	0.00 %
d. Health Insurance Premium and Cost Sharing Assistance for Low-Income Individuals	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Home and Community-Based Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Home Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
g. Hospice	$0	0.00 %	$0	0.00 %	$0	0.00 %
h. Medical Case Management, including Treatment Adherence Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
i. Medical Nutrition Therapy	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Mental Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Oral Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
l. Outpatient/Ambulatory Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
m. Substance Abuse Outpatient Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
1. Core Medical Services Subtotal	$0	0.00 %	$0	0.00 %	$0	0.00 %

Part B Supplemental Core Medical Services

The third section of the Part B Supplemental Allocations Report is the Breakdown for Consortia and State Direct Services Final Funding. Just like for Part B, the core medical and support services and their funding amounts populate from the contracts in the GCMS and will automatically populate into the Allocations Report. On this screenshot we see the section for Core Medical Services.

Part B Supplemental Core Medical Services Waiver

This is a continuation of the screenshot from the last slide, however, here we see the funding information for Support Services.

Much like the Part B PTR, there is the checkbox for the 75% core medical services requirement at the bottom of the Breakdown for Consortia and State Direct Services Final Funding table . If you received a waiver, make sure to select the checkbox.

Once you have completed all the components of the Part B Supplemental Allocations Report, make sure to save your report.

Validating the PTR

Now that you've completed and saved each section of the report, you're ready to move on to validating your report.

You can validate your report by clicking on Validate. Once you do, the system will let you know that it is processing your validation request and it may take a few minutes to complete. You can refresh the page to see your results by clicking on "Validate" again or refreshing your browser by pressing the F5 key on your keyboard. Now let's continue by reviewing two types of validation results you may receive for your report.

Validation Categories

- If you receive a green "Congratulations" message, proceed to submitting your report

- For the RWHAP Part B PTR, there are two validation message categories that you may receive:

Errors	Warnings
• Must be corrected before you can submit your PTR	• Should be addressed, if possible, to prevent your project officer from returning the report to you

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If your validation process results in a green congratulations message, then you have no validation issues to address and can proceed to submitting your report. Alternatively, you may see a page with validation messages to address which we'll show on the next slide.

For the Part B PTR, there are just two types of validation messages: errors and warnings.

Errors must be corrected. You cannot submit your report with an error.

Warnings should be addressed, if possible, to prevent your project officer from returning the report to you. You are still able to submit your report with warnings by adding a comment for each warning you receive.

If you make changes to the information in your report, you must validate your report again before you are able to submit it.

Validation Results

You must fix all errors in your report before you can submit your data. Please fix all warnings as appropriate. For the warnings that you cannot or should not fix, enter a warning comment before you submit your data. To enter warning comments for a specific check, select the "Add Comment" link located in the Action column of the validation results table(s). Contact the help desk if you have questions about any of the validation errors, warnings, or alerts.

Recipient Information

Row No.	Check No.	Message	Type	Comment Count	Action
No report validation errors found.					

Required Documents

Row No.	Check No.	Message	Type	Comment Count	Action
No report validation errors found.					

Consolidated List of Contractors

Row No.	Check No.	Message	Type	Comment Count	Action
No report validation errors found.					

Allocations Report

Row No.	Check No.	Message	Type	Comment Count	Action
1	92	At least 75% of grant funds (minus the amount reserved for administrative, CQM, and planning/evaluation) must be allocated to core medical services.	Warning	0	Add Comment

Validation Results

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Here's a sample validation results page.

In this example, there's one warning that was received in the Allocations Report section. If we make any corrections to our Allocations Report to correct validation messages, we'll have to revalidate the report.

To add a warning comment, select "Add Comment" under the Actions column to the right of the warning validation. A new window will appear for you to enter your comment. When finished, please be sure to select "Save". In your comment, provide an explanation regarding the warning. The comment does not change the information in your report.

Once you have the validation process squared away, you can proceed to submitting your report.

Submit the PTR

To submit your PTR, first click on the "Submit" link.

In order to submit your report, you must enter a comment in the comment box. Please enter any meaningful feedback you have about your PTR submission.

Next, select the checkbox certifying the data in the report are accurate and complete.

Finally, click the "Submit" link at the bottom of the page. Once successfully submitted, your report will be sent to your project officer for review.

Technical Assistance Resources

We've come to the end of our instructions for submitting the PTR. If you have any additional questions, please feel free to ask them during the Q&A portion which we'll get to in just a minute. First, let's take a moment to review some additional helpful resources for you all.

Online Resources

TargetHIV Website
- 2023 RWHAP Part A PTR Manual
- GCMS Manual
- GCMS Webinar

HRSA HAB Website
- PCN #16-02

The TargetHIV website is the home of all our TA materials including the Part B PTR Manual and the GCMS webinar and manual. This webinar will also be posted to the site at a later date.

The HRSA HAB website also has plenty of helpful information, most notably PCN #16-02 which includes definitions of all the core medical and support service categories.

TA Resources

- Ryan White Data Support
  - 888-640-9356
  - RyanWhiteDataSupport@wrma.com
- EHBs Customer Support Center
  - 877-464-4772
  - Online TA Request

If you find yourself needing additional assistance you can always reach out to us at Ryan White Data Support. We can help walk you through accessing and completing the PTR as well as updating and adding contracts in the GCMS.
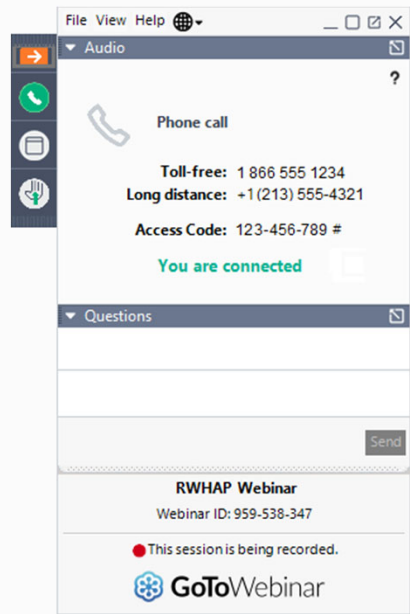
And if you need any assistance with your EHBs account such as passwords and permissions, the best resource is the EHBs Customer Support Center.

Thank you for attending today's presentation and now we'll move on to the Q&A portion of the webinar.