

# An Overview of Health Resources & Services Administration's (HRSA's) Electronic Handbooks (EHBs) for Recipients

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

October 18, 2023



Welcome to today's Webinar. Thank you so much for joining us today!

My name is Hunter Robertson. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for the RSR and the ADR.

## Today's Webinar is Presented by:



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Today's webinar will be presented by Moses Perrone who organizes and coordinates EHBs training with HRSA's OIT (Office of Information Technology).

Before I turn it over to Moses, I want to remind you that at any time during the presentation, you'll be able to send us questions using the "Q&A" function on your control panel at the bottom of your screen. We'll address all questions in the live Q&A session at the end of the webinar.

Throughout the presentation, Moses will reference some resources that we think are important. To help you keep track of these and make sure you have access to them immediately, my colleague Isia is going to chat out the link to a document right now that includes the locations of all the resources mentioned in today's webinar.

Now I'll turn this over to our presenter, Moses.

## AGENDA

- Learning Objectives
- EHBs Overview
- Logging into the EHBs
- Accessing the Ryan White Services Report (RSR)
- Resources
- Questions



Hello, everyone! During today's webinar we will cover:

Learning Objectives,

Provide an EHBs Overview,

Discuss Logging into the EHBs,

We will then review the steps for accessing the RSR, provide available resources, and take any questions you have.

## LEARNING OBJECTIVES

Participants will be able to:

- Understand the EHBs and the information contained within
- Understand the roles within EHBs needed to access the RSR
- Validate account as Project Director or request access needed to access the RSR



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After today's session, participants should be able to:

1. Understand the EHBs and the information contained within it
2. Understand the roles needed in the EHBs to access the RSR
3. And either validate an EHBs account as a Project Director or request the privileges needed to access the RSR

# EHBs OVERVIEW



And now, a quick overview of the EHBs...

## WHAT ARE THE EHBs?

- The HRSA Electronic Handbooks (EHBs) is the grants and program management system used by HRSA and its recipients
- Available on the internet – <https://grants.hrsa.gov> (use the “applicant/grantee” option)
- Allow authorized individuals within an organization to view, edit, or submit grant-related information electronically
- Facilitate HRSA monitoring and oversight of programs



### What are the EHBs?

The HRSA Electronic Handbooks – the EHBs - is the grants and program management system used by HRSA and its Recipients. It is a web-based application, which is available on the internet at [grants.hrsa.gov](https://grants.hrsa.gov). After navigating to this page, recipients should select the “Applicant/Grantee” option to be directed to the correct login page.

Once logged in, the EHBs allows authorized individuals within an organization the privileges to view, edit, or submit grant-related information electronically. It also is used by HRSA staff to receive and process those items, so it facilitates HRSA's monitoring and oversight of programs.

## RECIPIENT TASKS AND ACTIVITIES AVAILABLE IN EHBs

- Submission of grant-related requirements
  - Conditions of Award
  - Reporting Requirements
    - [RSR](#) (Ryan White Services Report)
    - [ADR](#) (ADAP Data Report)
  - Noncompeting Continuation Progress Reports
- Grant Change Requests (a type of Prior Approval request)
- Management of contact information and authorized users



Here are some Recipient tasks and activities that are available in the EHBs:

Recipients use the EHBs to submit grant-related requirements such as Conditions of Award, Reporting Requirements (like the RSR and ADR), and Noncompeting Continuation Progress Reports. They can also submit Grant Change Requests, which is a type of Prior Approval request, and Manage grant contact information and user access and privileges.

## RECIPIENT TASKS AND ACTIVITIES NOT AVAILABLE IN THE EHBs

Activity	Location
Competing Application Submission	<a href="http://www.grants.gov">www.grants.gov</a>
Draw down of federal funds	<a href="http://www.dpm.psc.gov">www.dpm.psc.gov</a>
Submission of Quarterly Federal Financial Report (FFR) to PMS	<a href="http://www.dpm.psc.gov">www.dpm.psc.gov</a>
Changes to Organization Information	<a href="http://www.sam.gov">www.sam.gov</a>



Some recipient tasks and activities that are NOT available in the EHBs are: competing application submissions, draw down of federal funds, submission of quarterly federal financial reports – FFRs – to PMS, or changes to organization information. For those items, please go to the location listed in the chart.



## EHBs AND THE RSR

- Recipients, including those who are also providers should use the EHBs to access their RSR Report(s).
- Provider Only Organizations will access the RSR through the EHBs



Recipients, including those who are also providers, will use the EHBs to access their RSR Recipient and Provider Reports.

## EHBs SYSTEM REQUIREMENTS – TEST YOUR SETTINGS

The screenshot displays the 'Applicant/Grantee' portal interface. At the top left, there is a 'LOGIN.GOV' section with instructions on how to use the service and a 'Login' button. To the right, a 'What's New' section lists recent updates, including a 'New EHBs Login Process' dated 05/26/2023. Below these, there are sections for 'Learning' (Grant Program, Free Clinic Program, FOHC-LAL Program) and 'Other Links' (Browser Requirements, Funding Opportunities, Track Grant Application). The 'Browser Requirements' link is highlighted with a red box. A 'Contact Us' section at the bottom right provides contact information for EHBs Customer Support, including a phone number (877-464-4772) and operating hours (7:00 a.m. to 8:00 p.m. ET).

Now, let's take a look at how to make sure your browser is set up to allow you to experience the full functionality of the EHBs.

This is a screen shot of the Login.Gov page. Looking towards the bottom left, locate the Browser Requirements link, shown here in the red box.

Clicking this link will take you to the Recommended Settings page to verify that your computer's settings meet the EHBs requirements.

After a quick test is done by your system, the resulting screen will show you how your computer settings compare to the minimum and recommended settings for the EHBs.

It also informs you whether any items need addressing on that computer in order for you to experience the full functionality of the EHBs without any issues related to your browser or browser settings.

# EHBs SYSTEM REQUIREMENTS – TEST YOUR SETTINGS

**Recommended Settings**

**Your Test Results**  
✔ Passed

**Note**  
 • Results are dependent on the use of one of the recommended settings. If you are not currently using a recommended setting, your results may not be accurate. If you are having trouble connecting with your system settings or for a full list of troubleshooting FAQs, read our [Recommended Settings Guide](#) for more information.

Requirements	Minimum Requirements	Recommended Settings	Your Values	Check
<b>Browser</b>	Microsoft Edge version 88 or higher Mozilla Firefox 3.6 or higher	Microsoft Edge version 88 or higher Mozilla Firefox 11.0	Chrome 118.0	✔
<b>Javascript</b>	Enabled	Enabled	Enabled	✔
<b>Screen Resolution</b>	1024 x 768 and above	1280 x 960	1707 x 960	✔
<b>Cookie</b>	Enabled	Enabled	Enabled	✔
<b>Popup Blocker</b>	Enabled	Enabled	Enabled	✔
<b>Date &amp; Time</b>	Current	10/16/2023 3:02:50 PM ET ( GMT-4:00 )	10/16/2023 3:02:50 PM ET ( GMT-4:00 )	✔
<b>ActiveX</b>	Installed	Installed	Installed	✔



Here’s a sample of what the results may look like after a test.

Please note that in large organizations, browser settings may not be changeable by regular users, so please check your setting early and have your system administrator review and make changes if needed.

## EHBs SYSTEM REQUIREMENTS (Cont.)

- To view documents, you must have appropriate software installed
  - MS Word
  - MS Excel
  - PDF Reader
- You may want to check with your organization's IT group for software installations.



To view your documents in the EHBs, you must have the appropriate software installed, including:

MS Word  
MS Excel  
PDF Reader

If you're unsure, you may want to check with your organization's IT support group for software installations.

# LOGGING INTO THE EHBs



Now I'll provide an overview of how to log into the EHBs.

# LOGGING INTO THE EHBs

- From “grants.hrsa.gov”, select “Applicant/Grantee

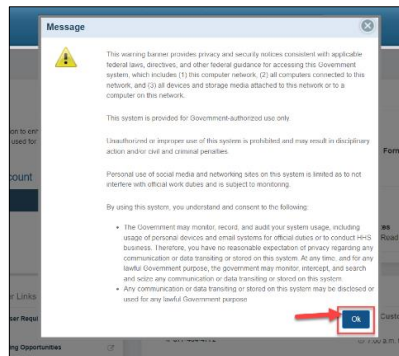


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After navigating to “grants.hrsa.gov” on the internet, select the Applicant/Grantee card.

## LOGGING INTO THE EHBs

- Review the warning banner
- Select **Ok** to continue



Review the warning banner and select Ok to continue to the EHBs login page.

# EHBs LOGIN PAGE

**HRSA Electronic Handbooks**

**Applicant/Grantee**

**LOGIN.GOV**

The EHBs uses Login.gov and two-factor authentication to enhance security. Use your existing Login.gov account, with the same email used for the EHBs, or create a new Login.gov account.

Create Login.gov Account

Login

**What's New** [View all](#)

**New EHBs Login Process** 05/26/2023  
Beginning May 26, 2023, to access the EHBs Applicants, Grantees, Service Providers, Consultants, and Technical Analysts must use Login.gov and two-factor authentication. For information about... [\(Read More\)](#)

**What's New Go Live Grantee Message** 01/26/2022  
**What's New Message :**  
**New Prior Approval (PA) and Other Submissions (ECM) Budget Forms**  
The EHBs has... [\(Read More\)](#)

**Learning**

- Grant Program [↗](#)
- Free Clinic Program [↗](#)
- FQHC-LAL Program [↗](#)

**Other Links**

- Browser Requirements [↗](#)
- Funding Opportunities [↗](#)
- Track Grant Application [↗](#)
- Help [↗](#)
- Other EHBs Portals [↗](#)

**Contact Us**

- Contact [↗](#) EHBs Customer Support
- ☎ 877-464-4772 ☎ 7:00 a.m. to 8:00 p.m. (ET)
- 📍 HRSA Help Center 📅 Monday through Friday
- 📅 Closed All Federal Holidays



We're now at the Login.Gov page. Before going further, let's break the page down into sections and go over it.



## EHBs LOGIN PAGE

The screenshot shows the EHBs Login Page for Applicants/Grantees. It is divided into four sections:

- Section A:** LOGIN.GOV section with a 'Login' button and a 'Create Login.gov Account' link.
- Section B:** What's New section with two messages: 'New EHBs Login Process' (dated 05/26/2023) and 'What's New Go Live Grantee Message' (dated 01/28/2022).
- Section C:** Learning and Other Links section with links for Grant Program, Free Clinic Program, FQHC-LAL Program, Browser Requirements, Funding Opportunities, Track Grant Application, Help, and Other EHBs Portals.
- Section D:** Contact Us section with contact information for EHBs Customer Support, including phone number (877-464-4772), hours (7:00 a.m. to 8:00 p.m. (ET)), and a note about Monday through Friday and closed on federal holidays.

I've broken the page down into 4 sections: A, B, C, and D.

Section "A" displays the **login** prompt. We'll review these steps in a moment.

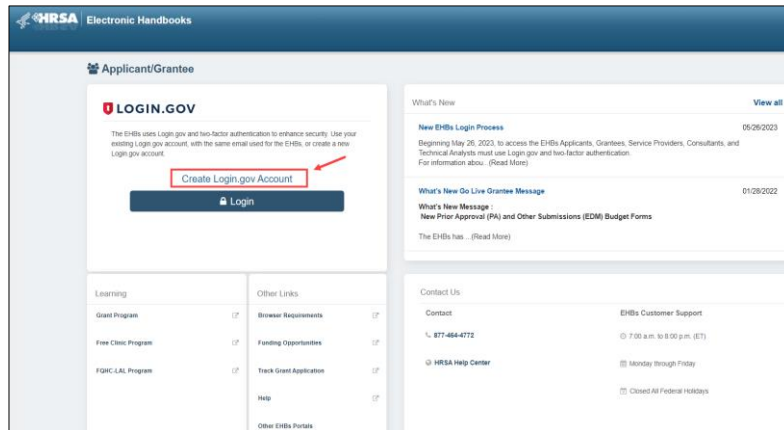
Section "B" is the "**What's New**" section. This displays important information and updates to the EHBs. You can always select the message or 'View All' to read more.

Section "C" shows the **Learning** and **Other Links** section, which provides helpful links to various HRSA Programs, Funding Opportunities, and the Wiki Help pages. Simply select a link to view more information on a specific topic.

Lastly, the **Contact Us** section, section "D", displays contact information and hours for the EHBs Customer Support center.

## LOGGING INTO THE EHBs

- Navigate from “grants.hrsa.gov” to the “Login.Gov” page.



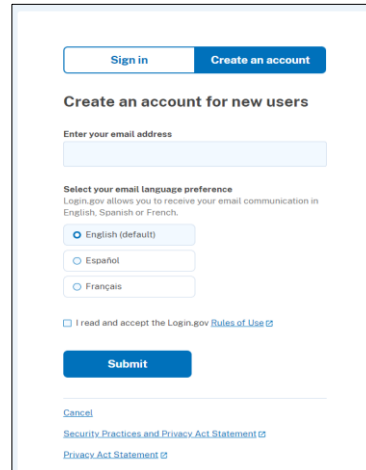
So you'll notice that at the “Login.Gov” page, you'll be given two choices:

- Create a Login.gov account,
- or Login.

If you haven't previously created an account, and are new to the EHBs, Click the “Create Login.gov Account” link on the login screen, shown here, outlined in red.

## LOGGING INTO THE EHBs

- Enter your email address
- Select language
- Read and accept Rules of Use
- Click Submit



The screenshot shows the 'Create an account for new users' section of the Login.gov interface. At the top, there are two buttons: 'Sign in' and 'Create an account'. Below this, the heading 'Create an account for new users' is followed by the instruction 'Enter your email address' and a text input field. Underneath, the section 'Select your email language preference' includes a note: 'Login.gov allows you to receive your email communication in English, Spanish or French.' There are three radio button options: 'English (default)', 'Español', and 'Français'. A checkbox labeled 'I read and accept the Login.gov Rules of Use' is present. A blue 'Submit' button is at the bottom of the form. Below the form, there are links for 'Cancel', 'Security Practices and Privacy Act Statement', and 'Privacy Act Statement'.



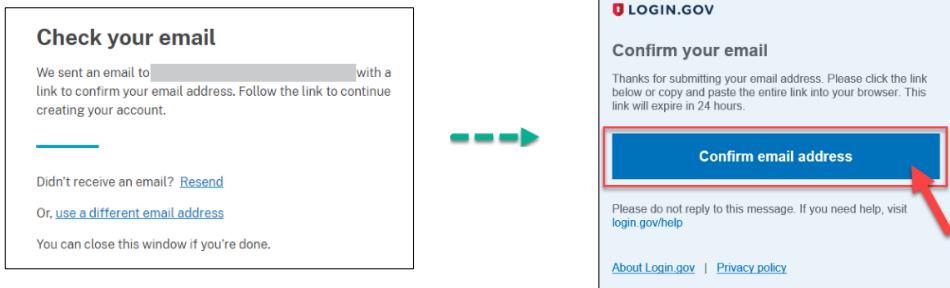
You'll then be prompted to enter your email address, select the preferred language, and read and accept the Rules of Use.

It's important to remember when entering your email address, enter the **same email address as you'll use in the EHBs.**

Then click **Submit.**

## LOGGING INTO THE EHBs

- You'll receive a confirmation email to the address used
- Confirm the email address

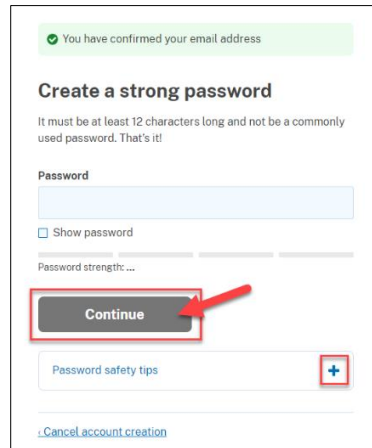


After clicking Submit you will receive a confirmation email to the address used to create the account.

Click the **Confirm email address** button to verify your account.

## LOGGING INTO THE EHBs

- Create a password & enter it
- Select Continue



The screenshot shows a web form for creating a strong password. At the top, a green notification bar states "You have confirmed your email address". Below this, the heading "Create a strong password" is followed by a note: "It must be at least 12 characters long and not be a commonly used password. That's it!". A "Password" input field is present, with a "Show password" checkbox below it. A "Password strength: ..." indicator is also visible. A red box highlights the "Continue" button, with a red arrow pointing to it. Below the "Continue" button is a "Password safety tips" link with a plus sign icon. At the bottom left of the form, there is a link for ".Cancel account creation".



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After confirming your email address, create a password and enter it in the **Password** field and click **Continue**.

If you so desire, you can view helpful tips on creating a strong password, by clicking on the **plus sign** next to Password Safety tips.

## LOGGING INTO THE EHBs

- Select Primary Authentication method
- Continue

**Authentication method setup**

Add another layer of security by selecting a multi-factor authentication method. We recommend you select at least (2) two different options in case you lose one of your methods.

- Security key**  
A physical device, often shaped like a USB drive, that you plug in to your device.
- Government employee ID**  
PIV/CAC cards for government and military employees. Desktop only.
- Authentication application**  
Download or use an authentication app of your choice to generate secure codes.
- Text or voice message**  
Receive a secure code by (SMS) text or phone call.
- Backup codes**  
A list of 10 codes you can print or save to your device. When you use the last code, we will generate a new list. Keep in mind backup codes are easy to lose.

**Continue**

[Cancel account creation](#)



Next select a primary **Authentication method** to be used for two-factor authentication and click **Continue**.

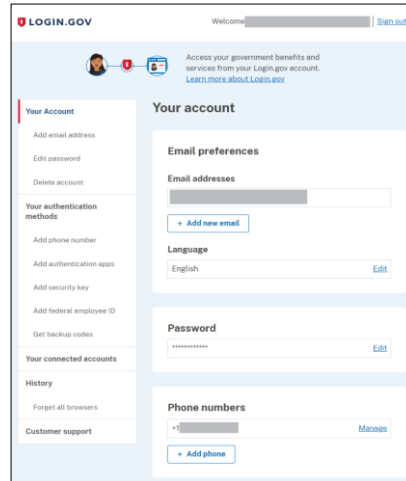
The authentication method helps ensure your account is secure.

After clicking **Continue** you will land on a page with additional questions and setup steps based on the authentication method.

Follow the prompts to complete the setup.

## LOGGING INTO THE EHBs

- “Your account” page appears
- Account is now active
- Verify information
- Return to “grants.hrsa.gov”



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After completing the steps, you will land on “Your account” page.

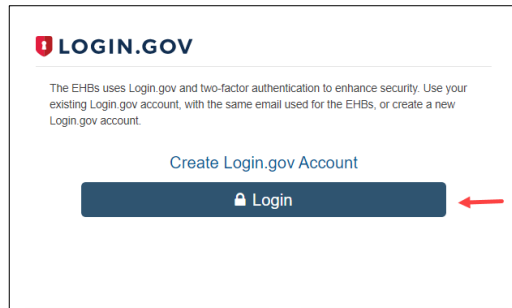
Your Login.gov account will now be created and active!

You can add or edit any information as needed.

When done, simply go back to “grants.hrsa.gov” to select the “Applicant/Grantee” card.

## LOGGING INTO THE EHBS

- If you already have an account, select Login

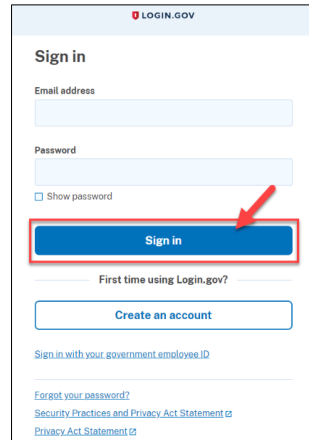


If you already have an existing [Login.gov](#) account, simply select login.



## LOGGING INTO THE EHBs

- Use the same email address used in the EHBs
- Sign in



LOGIN.GOV

Sign in

Email address

Password

Show password

Sign in

First time using Login.gov?

Create an account

[Sign in with your government employee ID](#)

[Forgot your password?](#)

[Security Practices and Privacy Act Statement](#)

[Privacy Act Statement](#)



Enter your email address and password.

Remember, the email address has to be the same as you use in the EHBs.

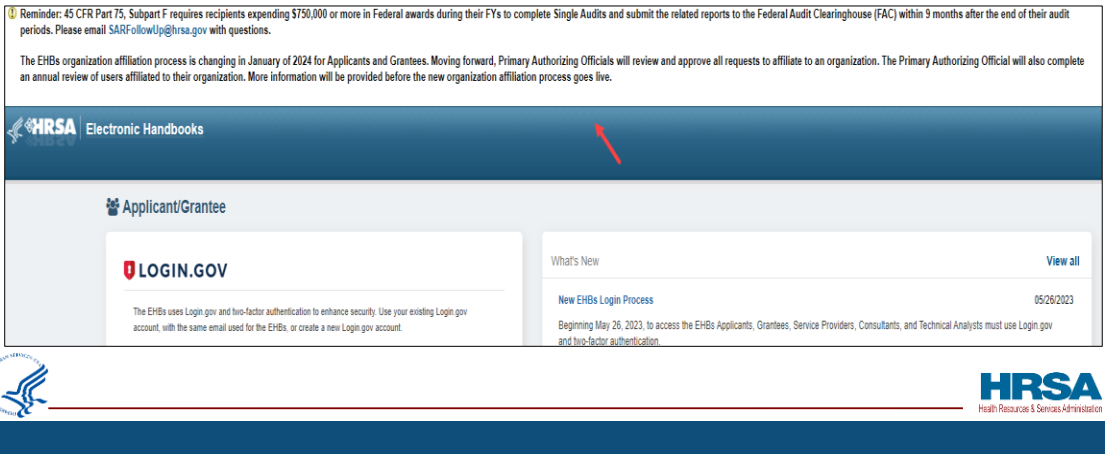
After typing in your password, select Sign in.

## EHBs LOGIN PAGE

- Keep a lookout for alerts at the top of the Homepage

**Reminder: 45 CFR Part 75, Subpart F** requires recipients expending \$750,000 or more in Federal awards during their FYs to complete Single Audits and submit the related reports to the Federal Audit Clearinghouse (FAC) within 9 months after the end of their audit periods. Please email [SARFollowUp@hrsa.gov](mailto:SARFollowUp@hrsa.gov) with questions.

The EHBs organization affiliation process is changing in January of 2024 for Applicants and Grantees. Moving forward, Primary Authorizing Officials will review and approve all requests to affiliate to an organization. The Primary Authorizing Official will also complete an annual review of users affiliated to their organization. More information will be provided before the new organization affiliation process goes live.



**HRSA** Electronic Handbooks

Applicant/Grantee



**LOGIN.GOV**

The EHBs uses Login.gov and two-factor authentication to enhance security. Use your existing Login.gov account, with the same email used for the EHBs, or create a new Login.gov account.

What's New [View all](#)

**New EHBs Login Process** 05/26/2023

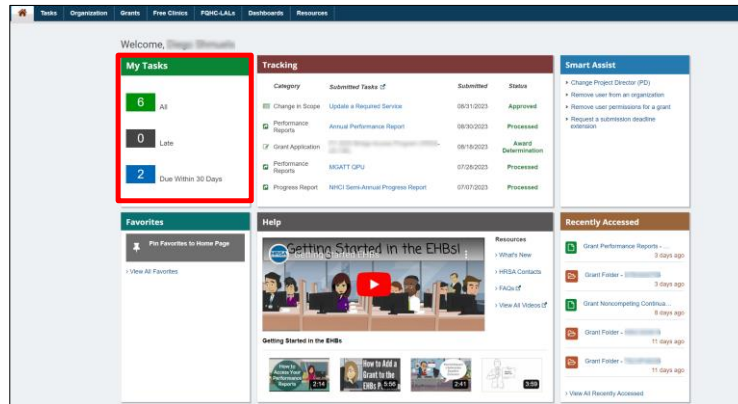
Beginning May 26, 2023, to access the EHBs Applicants, Grantees, Service Providers, Consultants, and Technical Analysts must use Login.gov and two-factor authentication.



Remember to always keep a lookout for any important alerts and reminders at the top of the Login.Gov page.

# EHBs HOME PAGE

- When you first log in to the EHBs, you will not have access to organization information or tasks assigned as shown, until account is validated by Adding Grant to Portfolio



This is a screen shot of the EHBs landing page, or home page, the screen you see when you first log in each time.

The very first time you log in to the EHBs, you will not have access to your organization information until your account is *validated* by Adding your Grant to your Portfolio, which we will discuss next.

So, until that is done, when you log in, you will see you have no tasks assigned to you.

Take notice here that a Help section with videos, Smart Assist section, Favorites, and Recently Accessed section are also displayed on the home page.

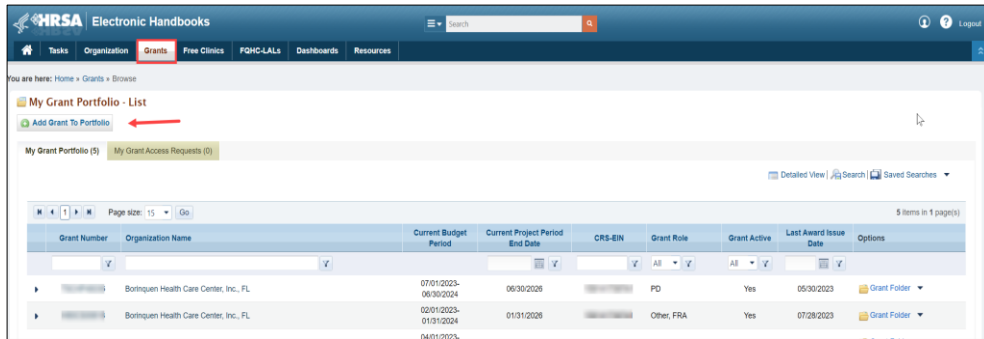
# GRANT LEVEL REGISTRATION



Now, let's walk through the ***Grant-level*** registration process.

# GRANTS TAB

- The Grants Tab will display all grants for which you have access.
- Click “Add Grant to Portfolio” if you do not see the grant you are looking for in the list of Grants.



When you’re logged into the EHBs, you will see several tabs at the top left of your screen. The Grants tab will take you to a list of all grants for which you have already been given access.

The Grant or Grants for which you need to work on the RSR should be listed in the Grants tab. If the grant you are looking for is NOT in the grants list, click the “Add Grant to Portfolio” button, shown here next to the red arrow. This will allow you to search for the grant and add it to your portfolio so that it will show on this screen going forward.

## EHBs ROLES-GRANT LEVEL

- In the context of the RSR, you are either the Project Director or Other
- **Register as Project Director**
  - There is only one project director allowed for each grant
  - Name must match name listed on the most recent Notice of Award (NoA)
  - Need CRSEIN and Award Issue Date to Register
  - Will have access to all non-financial reports once validated
  - Manage access and privileges for other users
- **Request Access (everyone else)**
  - Any other members of the organization who will need to view, edit or submit the RSR to HRSA should choose this option



Before we look at how to “Add a Grant to Portfolio”, let’s look at the EHBs’ roles at the Grant level.

In the context of the RSR, you are either the Project Director or Other Employee.

### **Here’s what you need to know about Registering as the Project Director:**

There is only one project director allowed for each grant

The name must match the name listed on the most recent Notice of Award (NoA)

You need the CRSEIN and Award Issue Date to Register

Once validated, you will have access to all non-financial reports

You will be automatically authorized to Manage grant access and privileges for- other users

### **The Request Access option is for Everyone Else who is NOT a project director.**

So, any other members of the organization who will need to view, edit or submit the RSR to HRSA should choose this option

## ADD GRANT TO PORTFOLIO

- Select your role for the grant

HRSA Electronic Handbooks

Tasks Organization **Grants** Free Clinics FQHC-LALs Dashboards Resources

You are here: Home > Grants > Browse

### Add Grant To Portfolio

Fields with \* are required

\* Select Registration Option

Register as Project Director (PD) - I am a project director for a grant

Request Grant Access - I support grant reporting: Progress Reports, Performance Reports, Financial Reports, Noncompeting Applications and others

[Return To Portfolio](#)

Acceptable Use Policy | Accessibility | Viewers And Players | Contact Us | Vulnerability Disclosure Policy

Last Login: 08/18/22 9:36:00 AM ET

Now, here is the Add Grant to Portfolio screen, the page that results when you click the “Add Grant to Portfolio” button we looked at two slides ago.

Here, you will select your role for the grant:

- Either Project Director ..... Or...
- Request Grant Access

## ADD GRANT TO PORTFOLIO (Cont.)

The screenshot displays the HRSA Electronic Handbooks interface. The main heading is "Register as Project Director - Select Grant". Below this is a table of grants. The table has the following columns: Grant Number, Project Title, Organization Name, Organization Role, Project Period End Date, Grant Active, PD Registered, and Options. The second row of the table shows a grant from "BORINQUEN HEALTH CARE CENTER INC FL" with an "Organization Role" of "BO" and a "Project Period End Date" of "06/30/2026". The "Options" column for this grant contains a "Register" link, which is circled in red.

Grant Number	Project Title	Organization Name	Organization Role	Project Period End Date	Grant Active	PD Registered	Options
		BORINQUEN HEALTH CARE CENTER INC FL	BO	08/31/2026	Yes	Yes	Register
		BORINQUEN HEALTH CARE CENTER INC FL	BO	06/30/2026	Yes	Yes	Register



After selecting to register as Project Director, the 'Register as Project Director - Select Grant' page will appear.

Under the Options section, select the "Register" link next to the grant, for which you want to register as the Project Director.



## ADD GRANT TO PORTFOLIO (Cont.)

**Register as Project Director**

Status: Registered To Grant

Project Director on NoA: [Redacted] Project Director Email on NoA: [Redacted]  
Organization: [Redacted] Project Director Phone on NoA: (000) 000-0000

Project Director Name on NoA	Project Director Name on Profile	Status
[Redacted]	[Redacted]	Validated

Fields with \* are required

Enter the following information from NoA

Issue Date for [Redacted] (Federal Award Date on Page One NoA) [Redacted] (mm/dd/yyyy)  
Note: Item 1 on old NoA

CRS-EIN for [Redacted] (Item 3 - Payment System Identifier(D) on Page One NoA) [Redacted] (e.g. 199999999X9 or X)  
Note: Item 18 on old NoA

Enter the level of access you want for the Financial Report

Financial Report Access  View Financial Report

Certification

I, [Redacted], certify that I am the Project Director for grant. [Redacted]

You will then be taken to the “Register as Project Director” page, where the EHBs will ask you a few questions to validate your role as the PD.

(Keep in mind you may want to have your Notice of Award (NOA) handy when registering as a PD)!

First, it will cross reference the name on the NOA with the name on your EHBs profile. This is very important, as the two names must be a perfect match!

Then, it will ask you for the date the NOA was released and for your CRS-EIN number, which can be found in box 18 of your latest NOA.

Lastly, you would check on the Certification box stating that you are the Project Director for the grant and click on the Save and Continue button.

You will then see a Success banner stating that you have successfully added the grant to your portfolio.



## TASKS ADDED TO HOME PAGE

- Tasks will appear in the “Items We Are Tracking For You” section.



Now that you have added the grant to your portfolio and have been given privileges to access grant related information, tasks will appear in the “My Tasks” section of your Home Page.

# GRANT LEVEL PRIVILEGES - RSR



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## GRANT LEVEL PRIVILEGES – RSR

- The RSR is a Performance Report. You will need Performance Report privileges to access the RSR. The Project Director will automatically have privileges to the RSR once the grant has been added to the portfolio.
- Everyone else will need to be given privileges by the Project Director or other user with “Administer Grant Users” privileges for the Grant.

**Grant Access - Request**

**Note(s):**  
Your request to access the following grant(s) will be approved by the respective grant Project Director (PD). The Financial Reporting access request will be approved by the Financial Reporting Administrator (FRA).

**Grant Group (1)**

Fields with \* are required

**Enter Your Comments**

Approximately 1 page (1) (Max 2000 Characters without spaces) 2000 Characters left

**Comments**

**Financial Privileges**  
(will be approved by grant FRA)

Submit Financial Reports

Create/Edit Financial Reports

View Financial Reports

Administer Financial Reports

**Other Grant Privileges**  
(will be approved by grant PD)

View Awards

Performance Reports

Prior Approval Request

Progress Reports

Noncompeting Continuations

Other Submissions

Program Specific

**Notification**

Notify Project Director/Financial Reporting Administrator of your request to add this grant to your portfolio.

[Return to List](#) [Request Access](#)

The RSR is a Performance Report.

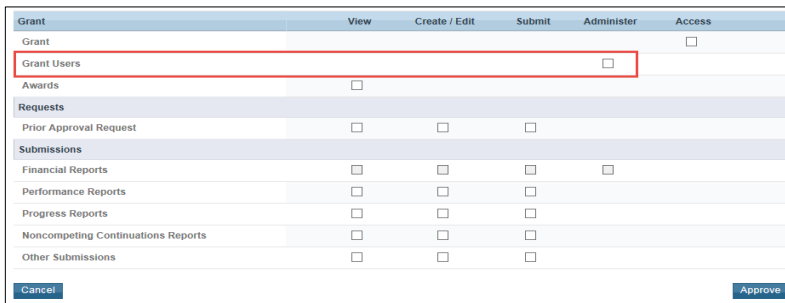
So, you will need Performance Report privileges to access the RSR.

The Project Director will automatically have privileges to the RSR once the grant has been added to the portfolio. Everyone else will need to be *given* privileges, either by the Project Director or another user who has the “Administer Grant Users” privilege for the Grant.

This screen shot shows how the checkbox can either be checked or not checked to allow this privilege . If it is checked, that person has privileges and can give others privileges as well. If it is not checked, that person cannot make adjustments to the privileges of other users.

## GRANT LEVEL PRIVILEGES – ADMINISTER GRANT USERS

- The Project Director should approve “Administer Grant User” privilege for at least one delegate to approve privileges for other users. Anyone with Administer Grant User privileges for a grant can approve and manage user privileges.
- How to Change your Project Director: [ChangeProjectDirectorVideo](#)
- Contact the HRSA EHBs Customer Support Center at 1-877-464-4772



Grant	View	Create / Edit	Submit	Administer	Access
Grant					<input type="checkbox"/>
Grant Users				<input checked="" type="checkbox"/>	
Awards	<input type="checkbox"/>				
Requests					
Prior Approval Request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submissions					
Financial Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Performance Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Progress Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Noncompeting Continuations Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Other Submissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



The Project Director should approve the “Administer Grant User” privilege for at least one delegate to approve privileges for others. Remember, anyone with Administer Grant User privileges for a grant, can approve and manage other users’ privileges.

Please make sure you know who is authorized to Administer those privileges. DO NOT WAIT until March to find out that your Project Director has changed, and you’re left with no one having the Administer Grant User role.

You can learn how to change your project director by going to the link displayed.

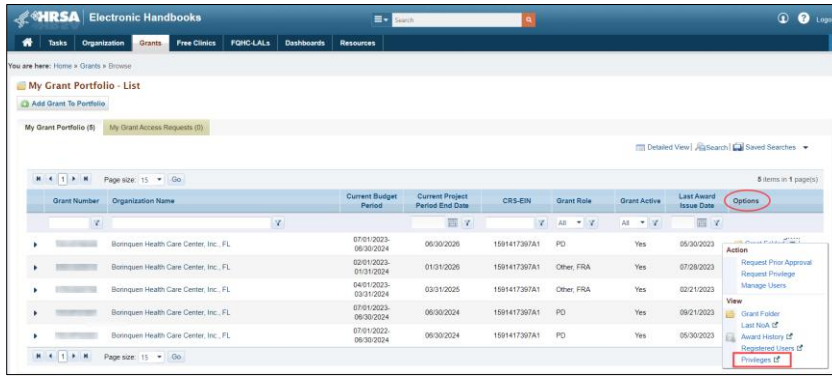
The project director is listed on the Notice of Award. Any change to the project director needs to be noted on that Notice of Award.

The organization may submit a prior approval request in the EHBs to make the change.

You can learn how to do this on the link displayed or contact the EHBs Customer Support Center at 1-877-464-4772.

# VERIFY YOUR PRIVILEGES

- To verify that you have the privileges to access the RSR, check to see if you have privileges for performance reports for the grant.



To verify that you have the privileges to access the RSR, check to see if you have privileges for performance reports for the grant.

To do that, select the Grants tab, find the “Options” column located on the far-right side of the row, and select the “Privileges” option from the resulting drop-down menu for that grant.

On the right side of the screen, you’ll see both the ‘Options column as well as the “Privileges” option highlighted in red.



## ACCESSING THE RSR



Now, let's walk through the **Grant-level** registration process.

## TASKS TAB OVERVIEW

- Pending tasks will appear in the tasks tab based on your privileges
  - Reports/requirements that have not been submitted
  - Prior approval requests that have been started, but not submitted
  - Change Requests
  - Requests for access (if applicable)
- Use the left side menu to access additional features



First, let's do a quick overview about tasks and the tasks tab. Remember before you registered, you saw zero tasks. Now that you're registered, that will likely not be the case!

Pending tasks will appear in the tasks tab based on your privileges.

Pending tasks include:

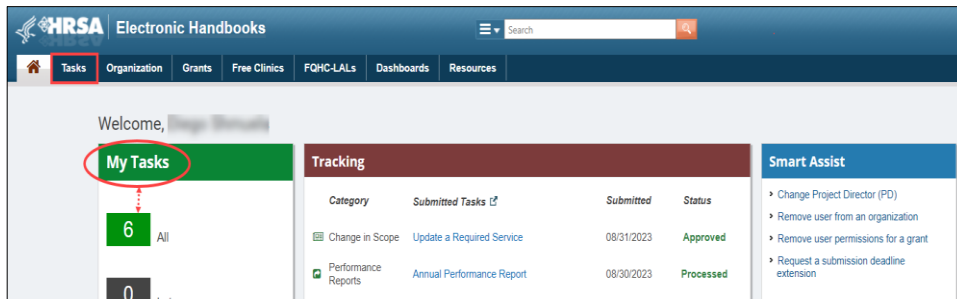
- Reports/requirements that have not been submitted
- Prior approval requests that have been started, but not submitted
- Change Requests
- Requests for access (if you are a PD or someone with permissions to approve access requests)

You may use the left side menu to access additional features. We'll take a look at this in a few slides.



## TASKS TAB OVERVIEW (Cont.)

- Pending tasks will appear in the Tasks Tab based on your privileges



The screenshot shows the HRSA Electronic Handbooks interface. The top navigation bar includes 'Tasks', 'Organization', 'Grants', 'Free Clinics', 'FQHC-LALs', 'Dashboards', and 'Resources'. The 'Tasks' tab is highlighted. Below the navigation bar, there is a 'Welcome, [User Name]' message. The 'My Tasks' section is highlighted with a red circle and a red arrow pointing to the 'Tracking' section. The 'My Tasks' section shows a count of 6 tasks under the 'All' filter. The 'Tracking' section displays a table of submitted tasks.

Category	Submitted Tasks	Submitted	Status
Change in Scope	Update a Required Service	08/31/2023	Approved
Performance Reports	Annual Performance Report	08/30/2023	Processed

The 'Smart Assist' section on the right lists several actions:

- Change Project Director (PD)
- Remove user from an organization
- Remove user permissions for a grant
- Request a submission deadline extension

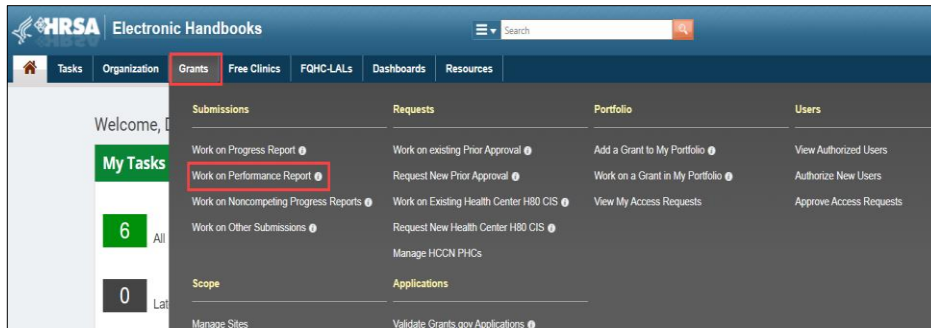


Accessing your Tasks can be done either at the top of the menu bar, or under the My Tasks section.

Note also the Tasks you submitted under the Tracking section located to the right of the My Tasks section.

## GRANTS TAB OVERVIEW (Cont.)

- Reports can be had through the Grants tab under the Submissions section.



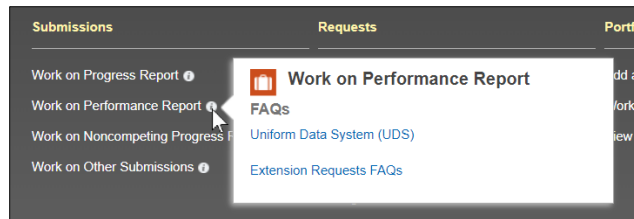
Although Reports can be had through the Tasks Tab, they can also be viewed through the Grants Tab.

One example would be the Performance Report, which is accessible from the Grants Tab, under the Submissions section.

This is where the RSR is located.

## PERFORMANCE REPORTS

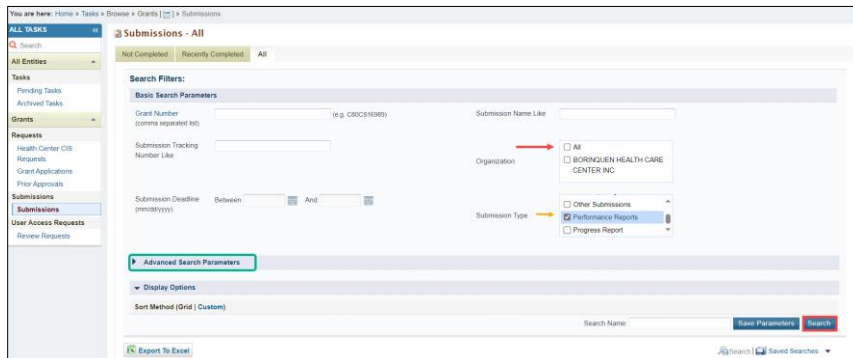
- Detailed data can be had by hovering over the information icon and selecting the individual hyperlinks.



By the way, if you hover over the information icon next to the “Work on Performance Report” link, you’ll be able to get detailed help and information on both the Uniform Data System (UDS) as well as the Extension Requests FAQs.

## PERFORMANCE REPORTS

- The Submissions-All page will appear, allowing parameter searching.



The screenshot displays the 'Submissions - All' page in the HRSA system. The page includes a navigation menu on the left with categories like 'ALL TASKS', 'Grants', 'Requests', 'Submissions', and 'User Access Requests'. The main content area is titled 'Submissions - All' and features a 'Search Filters' section. Under 'Basic Search Parameters', there are input fields for 'Grant Number (comma separated list)', 'Submission Tracking Number Like', and 'Submission Deadline'. The 'Organization' dropdown is set to 'All', with a red arrow pointing to the 'All' option. The 'Submission Type' dropdown is set to 'Performance Reports', with a yellow arrow pointing to it. Below the search filters, there is an 'Advanced Search Parameters' section highlighted with a green box, and a 'Display Options' section. At the bottom right, there is a 'Search Name' field, a 'Save Parameters' button, and a 'Search' button. An 'Export To Excel' button is located at the bottom left of the search area.

Once the Performance Report option is selected, the Submissions-All page will appear.

Before searching by parameters such as Grant Number or Submission Name, it is recommended you UNcheck the “All” box in the Organization area, shown here next to the red arrow.

Doing this, and checking the Performance Reports box, will yield quicker and more efficient results.

Notice that you also have the Advanced Search Parameters section if needed, as shown in green box.

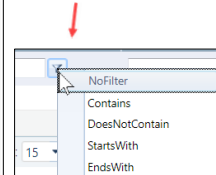
Lastly, click the Search button at the bottom right.



## PERFORMANCE REPORTS (Cont.)

The results of the search appears at the bottom of the page, by Submission Name and other criteria.

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
Annual Perform Report	Performance Reports	Borinquen Health Care Center, Inc. FL			07/01/2022 - 06/30/2023	07/31/2023	06/30/2023	Submitted	Performance Reports
MGATT OPU	Performance Reports	Borinquen Health Care Center, Inc. FL			04/01/2023 - 06/30/2023	06/27/2023	07/26/2023	Submitted	Performance Reports
MGATT OPU	Performance Reports	Borinquen Health Care Center, Inc. FL			01/01/2023 - 03/31/2023	05/31/2023	05/01/2023	Submitted	Performance Reports
UDS Performance Report	Performance Reports	Borinquen Health Care Center, Inc. FL			01/01/2022 - 12/31/2022	03/08/2023	03/08/2023	Submitted	Performance Reports
RSR 2022 Annual Performance Report	Performance Reports	Borinquen Health Care Center, Inc. FL			01/01/2022 - 12/31/2022	03/27/2023	03/27/2023	Submitted	Performance Reports
Annual Performance Report	Performance Reports	Borinquen Health Care Center, Inc. FL			07/01/2021 - 06/30/2022	08/01/2022	06/23/2022	Submitted	Performance Reports



You should see a list of Performance Reports displayed on the page by Submission Name, Submission Type and other criteria as shown in the gold box.

If you do not see your report on the first page, you can search the next page.

Also, you can narrow your search by typing data in the blank field and use the funnel filter icon to achieve quick results as shown by the red arrow.



**HRSA**  
Health Resources & Services Administration

## ACCESSING THE RSR

- Once you have privileges to view, edit, or submit performance reports (RSR), you will access it through the Tasks Tab
- You will not see the RSR in the Tasks tab if:
  - It has already been submitted
  - You do not have privileges for performance reports for the grant



Now let's talk about accessing the RSR.

Once you have privileges to view, edit, or submit performance reports, like the RSR, you will normally access it *through* the Tasks Tab.

You will *not* see the RSR in the Tasks tab if:

It has already been submitted or if you do not have privileges for performance reports for the grant.

# PENDING TASKS

- Use search and filter options at the top of the page for easy navigation. The RSR will appear as a “Performance Report” and show the deadline date.
- Click the “Submissions” link in the left side menu for more search and filter options.

The screenshot displays the HRSA Electronic Handbooks interface. The main content area is titled "Pending Tasks - List" and shows a table of tasks. The table has the following columns: Deadline (due), Task Category, Tracking #, Task, Entity, and Organization. The table contains several rows of data, including tasks for "Grant Submissions" and "Noncompeting Contributions" for "BORINGUEN HEALTH CARE CENTER INC". The left sidebar menu is visible, with the "Submissions" link highlighted in red. The top of the page features search and filter options, also outlined in red in the original image.

Deadline (due)	Task Category	Tracking #	Task	Entity	Organization	Options
04/30/2024	Grant Submissions		Other Submissions	(Grant)	BORINGUEN HEALTH CARE CENTER INC	Close
11/30/2023	Grant Submissions		Noncompeting Contributions	(Grant)	BORINGUEN HEALTH CARE CENTER INC	Close
11/30/2023	Grant Submissions		Other Submissions	(Grant)	BORINGUEN HEALTH CARE CENTER INC	Start
11/30/2023	Grant Submissions		Other Submissions	(Grant)	BORINGUEN HEALTH CARE CENTER INC	Start
11/30/2023	Grant Submissions		Other Submissions	(Grant)	BORINGUEN HEALTH CARE CENTER INC	Start
N/A	CIS Applications		New/Existing CIS	(Grant)	Boringuen Health Care Center, Inc.	Close
N/A	CIS Applications		New/Existing CIS	(Grant)	Boringuen Health Care Center, Inc.	Close

The Pending Tasks section of the Tasks Tab is where you will find the RSR Reports. If you have a long list of submissions required, you may use the search and filter options at the top of the page, shown here outlined in red, for easy navigation.

The RSR in this example appears as a “Performance Report”.

Click the “Submissions” link in the left side menu, shown here outlined in red, for more search and filter options.



# SUBMISSIONS SECTION

- Navigating to the Submissions section provides additional features like Submission Name.

**Submissions - Incomplete List**

Not Completed | Recently Completed | All

Export To Excel | Detailed View | Search | Saved Searches

Page size: 15 | Go | 4 items in 1 page(s)

Due In	Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Status	Options
All		All	All					All	
Due: Within 30 Days (2)									
20 Days	Reconciliation Report	Other Submissions	Borinquen Health Care Center, Inc., FL			07/01/2022 - 06/30/2023	10/30/2023	Not Started	Start
20 Days	T91 Information Request	Other Submissions	Borinquen Health Care Center, Inc., FL			07/01/2022 - 06/30/2023	10/30/2023	Not Started	Start
Due: In more than 30 Days (2)									
38 Days	Noncompeting Continuation Progress Report	Noncompeting Continuations	Borinquen Health Care Center, Inc., FL			04/01/2024	11/17/2023	In Progress	Edit
203 Days	NHCLHC Annual Expenditure Report	Other Submissions	Borinquen Health Care Center, Inc., FL			02/01/2023 - 01/31/2024	04/30/2024	In Progress	Edit

Page size: 15 | Go | 4 items in 1 page(s)



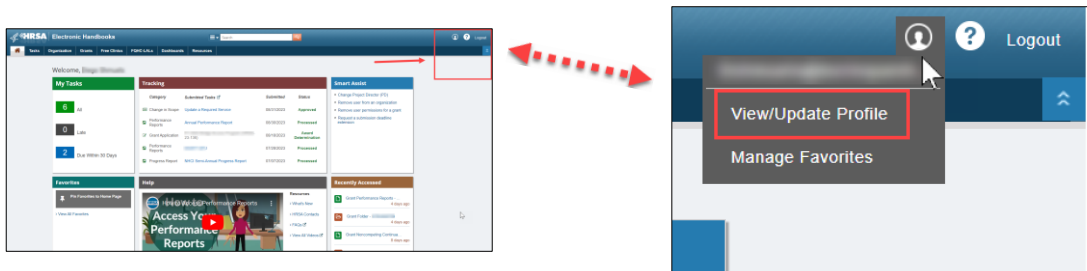
Once done, you'll be taken to the Submissions section.

Here you will see additional information and search options, such as "Submission Name" and "Current Status" as shown highlighted in gold.



## UPDATING CONTACT INFORMATION

- If any of your contact information changes, you must update your profile
- Click the View/Update Profile link on the top right of the Homepage



Now let's look at how you can verify or change the email address, or any other information associated to your account.

If any of your contact information changes, you must update your profile. This can be done via the upper right portion of the Homepage.

After hovering on your Username icon in the top right corner of the page, click the "View/Update Profile" link as shown outlined in red, to view or update your information.

# VIEW/UPDATE PROFILE PAGE

- Changes made to your profile will be reflected throughout the EHBs

**View/Update Profile**  
Fields with \* are required

**User Information**

Username: [text field]  
Title (Optional: Project Director, Director): Director of Quality & Clinical Practice Mgmt  
Subtitle (Example: Mr., Ms., Dr.): [text field]  
\* First Name: [text field]  
\* Last Name: [text field]  
Generation Qualifier (Example: J., Sr., III): [text field]  
Highest Degree: MD  
Department: Quality  
School: [text field]

**Contact Information**

\* Email Address: [text field] (username@domain.com)  
\* Phone Number: 200- [text field] - [text field] Ext. 1230  
Fax Number: [text field]  
\* Mailing Address (Required): [checkbox checked]

**Mailing Address (Internal Routing)**

Division / Department Name: [text field]  
Address Type:  Domestic Address  International Address (Required)  
Specify Domestic Address (Street Address or PO Box Only or Rural Route)

\* Address: [checkbox checked] Street Number: [text field] Street Name: [text field]  
 PO Box Only: [checkbox checked] Number: [text field]  
 Rural Route: [checkbox checked] Type: [Select Route] Number: [text field] Box: [text field]  
City: [text field] (Required if Zip is not specified)  
Urbanization: [text field] (Used only for Puerto Rico)  
\* State: [FL] (Required if City is specified)  
\* Zip Code (Leave out if): [33137] (Required if City is not specified)

Click here to enter mailing address if different from physical location address (specifying this address is optional) (Optional)



Any changes you make to your profile will be reflected throughout the EHBs and will be visible to your Project Officer and Grants Management Specialist.

# RESOURCES



Let's review some available resources.

## GENERAL RESOURCES

- **EHBs Help and Knowledge Base**

- [EHBs Help and Knowledge Base](#)

- **HRSA Tube – EHBs Videos**

- <http://www.youtube.com/hrsatube>



There are several resources available to you including the EHBs Help and Knowledge base.

You can access the Help and Knowledge base by going to [help.hrsa.gov](http://help.hrsa.gov) or clicking on the URL provided on this slide.

We also have a wealth of videos to help you navigate the EHBs available at [youtube.com/hrsatube](http://youtube.com/hrsatube).

## TA RESOURCES

- **HAB Web Site**

- Policy notices, instructions, and HAB information  
<http://hab.hrsa.gov>

- **TargetHIV**

- Training materials, manuals, and submission timeline  
<https://targethiv.org>
- RSR Instruction Manual: [RSR Instruction Manual](#)



Here are some helpful resources to consult when reporting:

The HAB website is the place to find policy notices and instructions, as well as other general information concerning the Ryan White program.

On the TargetHIV web site you can find the submission timeline, the listserv, past webinars, the 2023 RSR Instruction manual, and a wealth of other materials related to the RSR.

## TA CONTACT INFORMATION

- **Ryan White Data Support**
  - 888-640-9356 | [RyanWhiteDataSupport@wrma.com](mailto:RyanWhiteDataSupport@wrma.com)
- **The DISQ Team**
  - [Data.TA@caiglobal.org](mailto:Data.TA@caiglobal.org)
- **EHBs Customer Support Center**
  - 877-464-4772
  - Hours: 7:00 AM – 8:00 PM ET (M-F)
  - [EHBs Customer Support Center](#)
- **CAREWare Helpdesk**
  - 877-294-3571 | [CAREWare Helpdesk](#)
  - Listserv: [CAREWARE@LIST.NIH.GOV](mailto:CAREWARE@LIST.NIH.GOV)



Here are the additional Technical Assistance resources available to you throughout the year should you require further assistance. The Data Support team addresses RSR-related content and submission questions. This includes interpretation of the RSR Instruction Manual and HAB's reporting requirements. It also provides step-by-step instructions for completing the RSR Recipient and Provider Reports, data validation questions, and any general questions about the RSR.

The DISQ team addresses questions for those that need assistance to meet data reporting requirements, including help in determining if recipient systems currently collect required data. They also assist recipients in extracting data from their systems and reporting it using the required XML schema. They also help to connect recipients to others that use the same data systems.

Lastly, DISQ deals with data-quality issues and provides technical assistance for the TRAX Application.

The EHBs Customer Support Center addresses RSR software-related questions such as registering for and navigating the EHBs and RSR Web System. They can also assist in resetting passwords, and making sure that you have the right permissions to complete your reports.

They are available 7am – 8pm Eastern Time, Monday Through Friday. You can reach them by phone at 1-877-464-4772 or by using the Contact Us form available at the URL provided.

For CAREWare users, the CAREWare Help desk is the best resource for all CAREWare-related questions. CAREWare users should sign up for the listserv on the HAB website to join the conversation with their peers.



## Connect with HRSA

To learn more about our agency, visit

[www.HRSA.gov](http://www.HRSA.gov)



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Health Resources & Services Administration

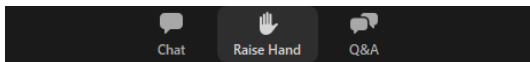
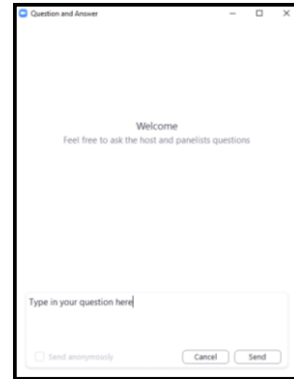
No Notes.

## Let's Hear From You!

- Please use the “raise hand” function to speak. We will unmute you in the order that you appear.

OR

- Type your question in the question box by clicking the Q&A icon on the bottom toolbar.



Thank you, **Moses**.

Before we start the Q & A, I would like to remind you that a brief evaluation will appear on your screen as you exit, to help us understand how we did and what other information you would have liked included on this webinar. We really appreciate your feedback and use this information to plan future webinars. My colleague Isia is going to put a link out in the chat feature if you would prefer to access the evaluation right now. We'll also send a final reminder via email shortly after the webinar.

As a reminder, you can send us questions using the “Q&A” button on your control panel on the bottom of your screen. You can also ask questions directly “live.” You can do this by clicking the “raise hand” button, which is also on your control panel. If you raise your hand, we'll be able to allow you to unmute and ask your question. We hope you consider asking questions “live” because we really like hearing voices other than our own.

We do want to get all of your questions answered, and we do not usually run over an hour. If you have submitted your question in the question box and we cannot respond to your question today, we will contact you via email to follow up. Sometimes we need to do some follow-up before providing you with a final answer, so stay tuned for the written Q&A as well for answers to all of your questions.