

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 19, 2022



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:



Asha Azariah-Kribbs
HRSA Office of Information Technology (OIT)
EHBs Training Team & Customer Support Branch
Aazariah-kribbs@hrsa.gov



Hunter Robertson
Abt Associates
Data.TA@caiglobal.org



Today's webinar will be presented by Asha Azariah-Kribbs, who works with the EHBs training team as well as the EHBs Customer Support Center within HRSA's OIT (Office of Information Technology).

Before I turn it over to Asha, 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, Asha 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, Asha.

AGENDA

- Learning Objectives
- EHBs Overview
- New User Registration
- Grant Level Registration
- 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 New User Registration and Grant Level Registration.

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



HRSA
Health Resources & Services Administration

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



HRSA
Health Resources & Services Administration

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



HRSA
Health Resources & Services Administration

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. 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	www.grants.gov
Draw down of federal funds	www.dpm.psc.gov
Submission of Quarterly Federal Financial Report (FFR) to PMS	www.dpm.psc.gov
Changes to Organization Information	www.sam.gov



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

Existing Users

Username (Email)

Password

[Login](#) [Forgot Password?](#)

New Users

[Create an Account](#)

[Click here to get started](#)

Contact Us

Time: 8:00 a.m. to 8:00 p.m. Eastern Time (ET)
Monday through Friday

Phone: 877-Go4-HRSA/877-464-4772

Link to contact us: [click here](#)

What's New

03/16/2018 - **Optimized Home Page and a New Help Video!**
Thanks to your feedback, starting March 16th, you will see a modernized Home Page with new quick links in the Tracking Widget, a streamlined Help Widget, and an overall improved la...[Learn More](#)

01/18/2018 - **New features to help you manage your workload, and easily download and print your Grant documents!**
Starting January 19th, the EHBs has two new features that were added to address your feedback!

Archive Tasks: Declutter your Pending Tasks and Grant ...[Learn More](#)

[View All](#)

Learn About

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

Other Links

- [Browser Requirements](#)
- [Funding Opportunities](#)
- [Track Grant Application](#)
- [Help](#)



HRSA
Health Resources & Services Administration

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 page for the EHBs. On the lower, right corner of the screen, find the Browser Requirements link, shown here in the red box.

Click this link (outlined in red) to verify that your computer's settings meet the EHBs requirements.

When you click this link, a very quick test will be done, just a few seconds, no worries; 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.

***Please Note:** in large organizations, browser settings may not be changeable by regular users. Please check your setting early and have your system administrator review and make changes if needed?*

EHBs SYSTEM REQUIREMENTS

- Basic requirements to ensure EHBs function correctly:
 - Microsoft Edge (Preferred); Google Chrome (Accepted)
 - JavaScript enabled
 - Screen Resolution – 1024 x 768 or greater
 - Pop-ups allowed
 - Cookies allowed
 - ActiveX installed



Browser Requirements include using Microsoft Edge as the preferred browser, but Google Chrome is acceptable.

Ensure that the following browser features are enabled/allowed:

Java Script should be enabled

You should have a screen resolution of 1024 x 768 or greater.

Pop-ups should be enabled; This is because many of the links and buttons in the EHBs lead to dialogue boxes appearing. Not having pop-ups enabled would prevent that necessary function.

Cookies should be allowed

And, ActiveX should be installed.

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

You may want to check with your organization's IT group for software installations.

NEW USER REGISTRATION



Now I will provide an overview of the registration process for New Users.

EHBs REGISTRATION

- All members of the recipient organization who are responsible for viewing, editing or submitting grant-related information must register in the HRSA EHBs
- If you have registered before, you do not have to register again.
 - Click **“Create an Account”** if you are not sure



The screenshot displays the HRSA EHBs registration interface. It is divided into two main sections: "Existing Users" and "New Users".

Existing Users: This section contains a login form with two input fields: "Username (Email)" and "Password". Below these fields are two buttons: a blue "Login" button and a blue "Forgot Password?" link.

New Users: This section features a prominent red-bordered button labeled "Create an Account". Below this button is a blue link that says "Click here to get started" with an external link icon.



All members of the recipient organization who are responsible for viewing, editing or submitting grant-related information *must* register in the HRSA EHBs. If you have previously created an EHBs account, you do not have to register again. If you are not sure if you have previously registered, Click the “Create an Account” button on the login screen, shown here, outlined in red.

NEW USER REGISTRATION SCREEN

- Options are available to guide you through the registration process or locating your username.
- Use the first option, “I am Not Sure! Check if I have an account”, if you may have registered in the EHBs in the past.

You are here:

Registration - Have an EHBs Account?

I have never had an account.

I am Not Sure! Check if I have an account

I have never had an account: [Create an Account](#)

I have an account and...

I created an account but it is registered with another organization: [Associate the same account with a new organization](#)

I created an account but did not complete my registration: [Complete Registration](#)

I have an account, but...

I forgot my username: [Reach HRSA Contact Center to get your username](#)

I forgot my password: [Reset Password](#)

My account is disabled: [Reach HRSA Contact Center to reactivate your account](#)



When you click “Create an Account” you’ll go to a screen where several options are available to guide you through the registration process, or to help you in locating your username if you’ve registered before.

Use the first option, “I am Not Sure! Check if I have an account” If you may have registered in the EHBs in the past.

NEW USER REGISTRATION SCREEN (Cont.)

- Use the second option “I have never had an account: Create an Account” if you have never registered for an EHBs account before.

You are here:

Registration - Have an EHBs Account?

I have never had an account.

I am Not Sure! [Check if I have an account](#)

[I have never had an account: Create an Account](#)

I have an account and...

I created an account but it is registered with another organization: [Associate the same account with a new organization](#)

I created an account but did not complete my registration: [Complete Registration](#)

I have an account, but...

I forgot my username: [Reach HRSA Contact Center to get your username](#)

I forgot my password: [Reset Password](#)

My account is disabled: [Reach HRSA Contact Center to reactivate your account](#)



Use the second option “I have never had an account: Create an Account” ONLY if you are positive you have never had an account before.

NEW USER REGISTRATION SCREEN (Cont.)₂

- Use one of the additional options if you definitely have an account and one of the specific scenarios applies to you.

You are here:

Registration - Have an EHBs Account?

I have never had an account.

I am Not Sure! [Check if I have an account](#)

I have never had an account: [Create an Account](#)

I have an account and...

I created an account but it is registered with another organization: [Associate the same account with a new organization](#)

I created an account but did not complete my registration: [Complete Registration](#)

I have an account, but...

I forgot my username: [Reach HRSA Contact Center to get your username](#)

I forgot my password: [Reset Password](#)

My account is disabled: [Reach HRSA Contact Center to reactivate your account](#)



Use one of the additional options if you are sure you have an account, as highlighted in the red box, under those parameters.

However, most of you here will probably benefit from using the first option I mentioned– the “I am Not Sure! Check if I have an account” option.

FORGOT PASSWORD?

- If you have forgotten your username, password or your account is disabled, please use the follow options listed under the *I have an account, but....* section

You are here:

Registration - Have an EHBs Account?

I have never had an account.

I am Not Sure! [Check if I have an account](#)

I have never had an account. [Create an Account](#)

I have an account and...

I created an account but it is registered with another organization: [Associate the same account with a new organization](#)

I created an account but did not complete my registration: [Complete Registration](#)

I have an account, but...

I forgot my username: [Reach HRSA Contact Center to get your username](#)

I forgot my password: [Reset Password](#)

My account is disabled: [Reach HRSA Contact Center to reactivate your account](#)



If you have forgotten your username, password, or your account is disabled, please use the follow options that are outlined in red.

- “I forgot my username:” will provide you with the EHBs Customer Support Center’s contact information to call and obtain your username.
- “I forgot my password:” will provide you with the EHBs Customer Support Center’s information for you to call and have your password reset or you can click the reset password button to obtain a new password.
- “My account is disabled:” will provide you with the EHBs Customer Support Center’s contact information to call and reactivate your EHBs account.

REGISTRATION STEP 1: CREATE AN ACCOUNT

- Complete registration form with your information

The screenshot shows a registration form with a progress bar at the top. The progress bar has three steps: 1. Create Account (highlighted in green), 2. Associate Account to Organization, and 3. Select Your Role. Below the progress bar, there is a note: "Fields with * are required". The form is divided into two main sections: "User Information" and "Contact Information".

User Information

- * First Name:
- Middle Initial:
- * Last Name:
- * Username:
- * Password: Minimum number of characters is 8
- * Retype Password:
- * Security Question: Choose Option
- * Security Answer:

Contact Information

- * Email Address: (username@domain.com)



HRSA
Health Resources & Services Administration

Now, we'll look at what happens if you DO need to register.

Registration is a 3-step process.

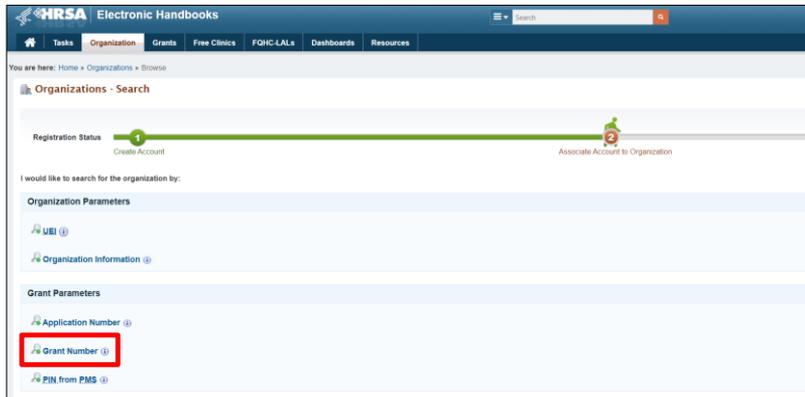
Step 1 is to create an account by filling out the fields in the forms shown on the screen.

In this step, you will create your own username and password, and provide contact information.

Please note that your username should exactly match the email address associated to the account.

STEP 2: ASSOCIATE ACCOUNT TO ORGANIZATION

- Search using Grant Number to ensure you add your account to the correct instance of the organization



The screenshot displays the HRSA Electronic Handbooks interface. At the top, there is a navigation menu with options: Tasks, Organization, Grants, Free Clinics, FQHC/LALs, Dashboards, and Resources. Below the menu, the breadcrumb trail reads 'You are here: Home > Organizations > Browse'. The main heading is 'Organizations - Search'. A progress bar indicates the current step is 'Associate Account to Organization' (step 2), with 'Create Account' (step 1) completed. Under the heading 'I would like to search for the organization by:', there are two sections: 'Organization Parameters' and 'Grant Parameters'. The 'Grant Parameters' section includes options for 'Application Number', 'Grant Number' (highlighted with a red box), and 'PIN from PMS'. The HRSA logo is visible in the bottom right corner.

Step 2 is to associate this account to your organization.

Choose the Grant Number option, shown here outlined in red, to search for your organization in order to ensure that your account is correctly added to the organization associated to your grant.

If you don't know your organization's grant number, you can search by using the UEI number associated to your organization. You may also search using your organization's information like the organization name, state, city or zip code.

STEP 2: ORGANIZATIONS LIST

- Searching using Organization Name may result in multiple results.
- Click side arrow to view more information.

Organizations - List

Note(s):
You cannot create new organization records in EHBs. If your organization is an existing HRSA grantee, its record already exists. If you have submitted an application in Grants.gov and have received notification from HRSA, your organization record should already exist. If you cannot find your organization, you will need to create it in CCR/SAM and then import it into EHBs. If you have questions, reach HRSA Contact Center.

Registration Status

1 Create Account 2 Associate Account to Organization 3 Select Your Role

Organization(s) matching the search criteria you entered were found in EHBs as displayed below. If your organization is not listed here, click the **Search** option and enter a different search criteria

Search Criteria: Organization Name like: University of Maryland

Page size: 15 Go 13 items in 1 page(s)

Organization Name	City	State	CRS-EM	DHS	Options
UNIVERSITY OF		MD	1	1	Register
UNIVERSITY OF		MD	7		Register
UNIVERSITY OF		MD	1	0	Register
UNIVERSITY OF		MD	1	1	Register
UNIVERSITY OF		MD	1		Register

If you search for your organization using criteria *other* than the grant number, you might see multiple search results listed. Click the side arrow, shown here with red outline, to view additional information about the organizations listed to make sure you register to the correct one.

STEP 2: ORGANIZATIONS LIST (Cont.)

- Click Register to add the organization to your account. You can add additional organizations to your account later, if necessary.



The screenshot shows the HRSA Organizations List page. At the top, there is a breadcrumb trail: "You are here: Home > Organizations > Browse". Below this is the "Organizations - List" header. A note states: "Note(s): You cannot create new organization records in EHBs. If your organization is an existing HRSA grantee, its record already exists. If you have submitted an application in Grants.gov and have received notification from HRSA, your organization record should already exist. If you cannot find your organization, you will need to create it in CCR/SAM and then import it into EHBs. If you have questions, reach HRSA Contact Center." Below the note is a registration progress bar with three steps: 1. Create Account, 2. Associate Account to Organization, and 3. Select Your Role. Below the progress bar, it says: "Organization(s) matching the search criteria you entered were found in EHBs as displayed below. If your organization is not listed here, click the Search option and enter a different search criteria". The search criteria is "Organization Name like: University of Maryland". Below the search criteria is a table with columns: Organization Name, City, State, CRS E-IN, DUNS, and Options. The first row shows "UNIVERSITY OF MARYLAND" with a "Register" button highlighted with a red outline. Below the table, there are fields for "Registered AO:" and "Grants Funded:". At the bottom left, there is a "Location Address: 2" field. At the bottom right, there is a "Other Programs: Not Available" field. The HRSA logo is in the bottom right corner.

Once you have verified your organization information, Click “Register”, shown here with a red outline, to add the organization to your account.

STEP 3: CHOOSE YOUR ORGANIZATION ROLE

- The organization role can be changed later, if necessary. This is your role at the Organization Level. Most users are “Other Employee.”
- The role selected here is not important for accessing the RSR

The screenshot shows a registration form with a progress bar at the top indicating three steps: 1. Create Account, 2. Associate Account to Organization, and 3. Select Your Role. The current step is Step 3. The form includes a dropdown menu for 'You are registering as:' with 'UNIVERSITY' selected. Below this, there is a section for 'Choose a role from the following that best describes your participation in the HRSA grants management process' with three radio button options: 'Authorizing Official (AO)', 'Business Official (BO)', and 'Other Employee (Project Director, AO Designee, Staff)'. The 'Other Employee' option is selected. There is also a checkbox for 'I am also responsible for Approving/Submitting the Financial Grant Reports' and a note stating 'Note: Only Authorizing Official (AO) or Business official (BO) can be responsible for Financial Grant Reporting.' At the bottom, there are 'Go Back' and 'Save and Continue' buttons. The HRSA logo is visible in the bottom right corner of the slide.

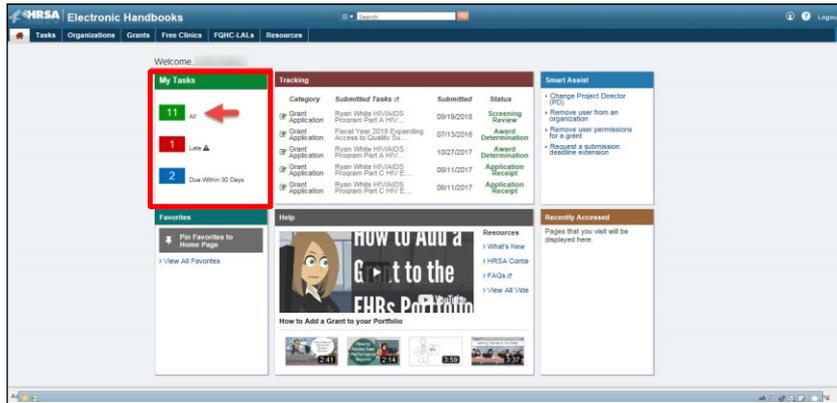
Next, choose your role within the organization – that is -- your role at the *Organization Level*. Your organization role can be changed later, if necessary. Most users are “Other Employees” and should select that option when selecting their role.

Please note that the role selected here does not determine your access to the RSR specifically. *That* access will be addressed in the next few slides.

We recommend that if you are a new user, you register now to avoid any delays in your RSR submission later in the process.

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 organization information, and you will not 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.

A Help section, Smart Assist section, and Favorites section are also displayed on the home page.

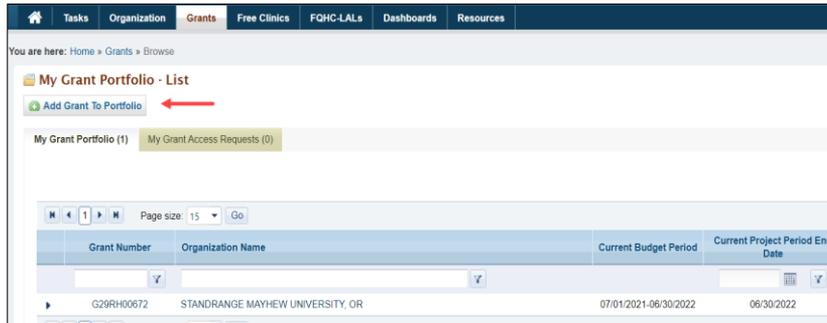
GRANT LEVEL REGISTRATION



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 the “Add Grant to Portfolio” screen, 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 FOHC-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 breadcrumb trail is 'Home > Grants > Browse'. The page title is 'Register as Project Director - Select Grant'. Below the title is a search bar and a 'Saved Searches' dropdown. A table lists grants with columns: Grant Number, Project Title, Organization Name, Organization Role, Project Period End Date, Grant Active, PD Registered, and Options. The table contains one row with the following data: Grant Number G29RH0972, Project Title Rural Health Clinic Vaccine Confidence Program, Organization Name STANDRANGE MAYHEW UNIVERSITY OR, Organization Role AO, Project Period End Date 06/30/2022, Grant Active No, PD Registered Yes, and Options Register. A red circle highlights the 'Register' link in the Options column. The page also includes pagination controls (Page size: 15) and a 'Cancel' button.

Grant Number	Project Title	Organization Name	Organization Role	Project Period End Date	Grant Active	PD Registered	Options
G29RH0972	Rural Health Clinic Vaccine Confidence Program	STANDRANGE MAYHEW UNIVERSITY OR	AO	06/30/2022	No	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.)

Fields with * are required

Enter the following information from NoA

* Issue Date for 2
H80CS26586-04-00 (mm/dd/yyyy)
(Item 1 on NoA)

* CRS-EIN for 2
H80CS26586-04-00 (e.g. 199
(Item 18 on NoA)

Enter the level of access you want for the Financial Report

Financial Report Access View Financial Report Edit Fir

Certification

* I, **Test User** certify that I am the Project Director for grant.



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.

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 click 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.

GRANT LEVEL PRIVILEGES - RSR



HRSA
Health Resources & Services Administration

GRANT LEVEL PRIVILEGES – RSR₂

- 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 Prior Approval Request Program Specific
 Performance Reports Progress Reports
 Noncompeting Continuations Other Submissions

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 the “Administer” column and 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: <https://youtu.be/JbVw4VvDHps?list=PLEF93841BAEF1FE28>
- 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"/>		

Cancel Approve



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

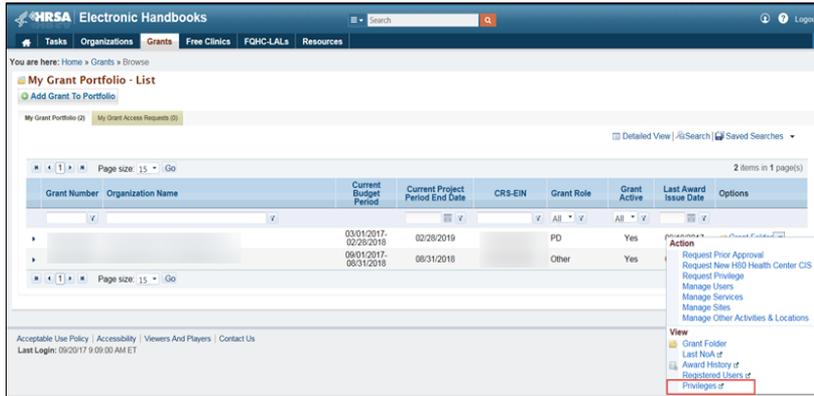
Please make sure you know who is authorized to Administer Grant User privileges. DO NOT WAIT until March to find out that your Project Director has changed and you’re left with no one having the Administer Grant Users role.

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 the Notice of Award. The organization may submit a prior approval request in the EHBs to make this request. 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 “Option” column located on the far right side of the row, and select the “Privileges” option from the resulting drop down menu for that grant. The “Privileges” option is shown here with red outline.

ACCESSING THE RSR



HRSA
Health Resources & Services Administration

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

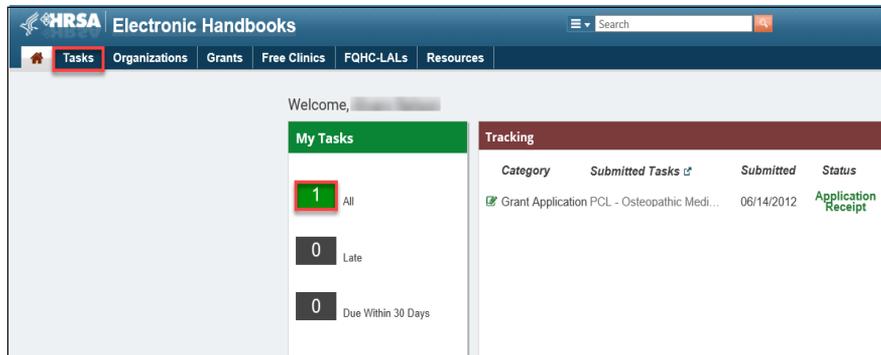
Change Requests

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 will 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', 'Organizations', 'Grants', 'Free Clinics', 'FQHC-LALs', and 'Resources'. The 'Tasks' tab is selected. Below the navigation bar, there is a 'Welcome, [User]' message. The main content area is divided into two sections: 'My Tasks' and 'Tracking'.

My Tasks

1	All
0	Late
0	Due Within 30 Days

Tracking

Category	Submitted Tasks ¹	Submitted	Status
Grant Application PCL - Osteopathic Medi...		06/14/2012	Application Receipt

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.

GRANTS TAB OVERVIEW

- Accessing reports can also be done via the Grants Tab.

The screenshot shows the HRSA Grants Tab interface. At the top, there is a navigation bar with tabs for 'Tasks', 'Organizations', 'Grants' (highlighted in red), 'Free Clinics', 'FQHC-LALs', and 'Resources'. Below the navigation bar, a reminder message states: 'Reminder, the Federal Funding Accountability and Transparency Act (FFATA) requires all recipients to report information for e you need assistance, please send a message to hrsapostawards@hrsa.gov'. A 'Welcome,' message is followed by a 'My Tasks' section with three categories: '4 All', '0 Late', and '1 Due Within 30 Days'. To the right is a 'Tracking' table with columns for 'Category', 'Submitted Tasks', 'Submitted', and 'Status'.

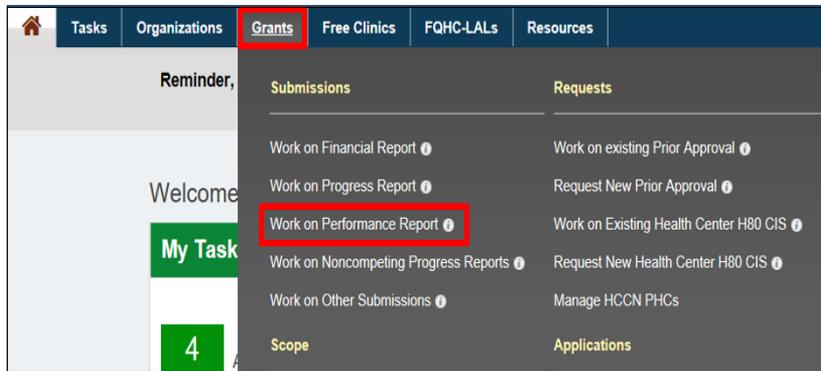
Category	Submitted Tasks	Submitted	Status
Other Submissions	RWHAP Expenditure Report - RWHAP Expenditure Report	06/24/2019	Processed
Other Submissions	FY 2019 Allocation Report	06/06/2019	Under Review
Other Submissions	FY 2019 Allocation Report	06/06/2019	.
Other Submissions	Maintenance of Effort	05/30/2019	Processed
Financial Report	Single Federal Financial Report	04/17/2019	Processed



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

GRANTS TAB OVERVIEW (Cont.)

- One example would be the Performance Report, which is accessible via 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

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

The screenshot shows the 'Submissions - All' search interface. It features a search filter section with the following elements:

- Search Filters:**
 - Basic Search Parameters:**
 - Grant Number (comma separated list): [Text Input]
 - Submission Name Like: [Text Input]
 - Submission Tracking Number Like: [Text Input]
 - Submission Deadline (mm/dd/yyyy): Between [Date Picker] And [Date Picker]
 - Organization:** [Dropdown Menu] with options: All (selected, indicated by a red arrow), HANDSHAW ROUTER HOSPITAL.
 - Submission Type:** [Dropdown Menu] with options: Other Submissions, Performance Reports (checked), Progress Report.
- Advanced Search Parameters:** [Section Header, highlighted with a red box]
- Display Options:**
 - Sort Method (Grid | Custom)
- Search Name:** [Text Input]
- Buttons:** Save Parameters, Search

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 red 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.

Page size: 15 Go 5 items in 1 page(s)

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
Final Report	Performance Reports			BPMFRT0800046295	07/01/2016 - 06/30/2020	09/30/2020		In Progress	Edit
Annual Performance Report	Performance Reports			BPMAPRT0800044681	07/01/2019 - 06/30/2020	07/31/2020	07/20/2020	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800042347	07/01/2018 - 06/30/2019	07/31/2019	07/29/2019	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800039784	07/01/2017 - 06/30/2018	07/31/2018	08/16/2018	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800036867	07/01/2016 - 06/30/2017	07/31/2017	07/26/2017	Submitted	Performance Reports



You should see a list of Performance Reports displayed on the page by Submission Name and other criteria.

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

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.

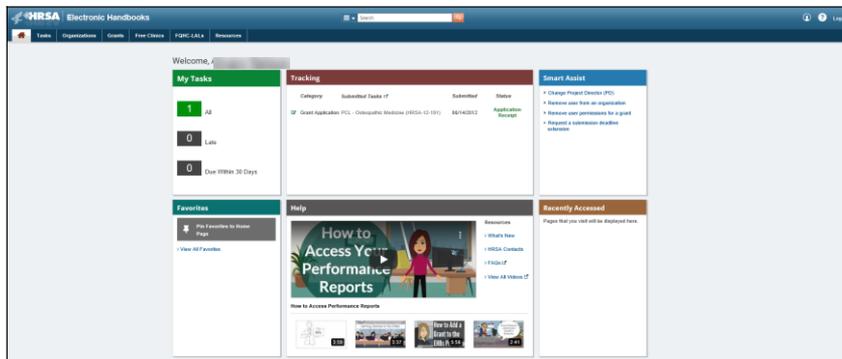
Once you have privileges to view, edit, or submit performance reports, like the RSR, you will normally access it *through* the Tasks Tab.

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.

LOGGING INTO THE EHBs

- Tasks will appear in the “Items We Are Tracking For You” section.
- The “My Recently Accessed” section is available for easy navigation to recently accessed items



HRSA
Health Resources & Services Administration

In this screen shot, we are back on the EHBs landing page, or “Home” page. 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. The “Recently Accessed” section, is available for easy navigation to recently accessed items.

You can also Pin Favorites to the Home page so you’ll easily be able to find frequently accessed tasks.

A “Help” section is now available with videos and FAQs that will assist you.

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 shows the HRSA Pending Tasks - List interface. The left sidebar menu has 'Submissions' highlighted in red. The main content area displays a table of pending tasks. The table has columns for Deadline (Due), Task Category, Tracking #, Task, Entity, and Organization. A red box highlights the search and filter options at the top of the table.

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
09/30/2020 11:55 PM (54 Days)	Grant Submissions	BPMFRT0800046295	Performance Reports	TOB-IP30192 (Grant)	Osteopathic Medicine, West Virginia School of	Edit



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.

Not Completed Recently Completed All

Export To Excel Detailed View Search Saved Searches

Page size: 15 Go 2 items in 1 page(s)

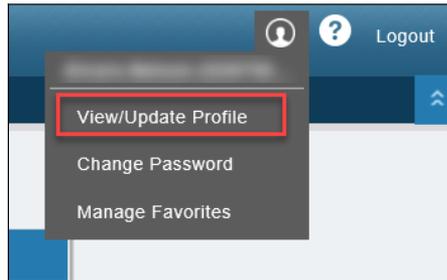
Due In	Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Status	Options
All		All	All					All	
Due: In more than 30 Days (2)									
54 Days	Final Report	Performance Reports	CUBLEY ABBOTTS HOSPITAL, WV	T08HP00729	BPMFRT0800046295	07/01/2016 - 06/30/2020	09/30/2020	In Progress	Edit
84 Days	Financial Report	Financial Report	CUBLEY ABBOTTS HOSPITAL, WV	T08HP00729	FFR001014001	07/01/2019 - 06/30/2020	10/30/2020	In Progress	Financial Report

Page size: 15 Go 2 items in 1 page(s)

If you click the left side menu submissions link, you will go to the Submissions section. Here you will see additional information and search options, like “Submission Name” and “Current Status”.

UPDATING CONTACT INFORMATION

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



And now that you have already registered, 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

After hovering on your Username, 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

You are here: [Home](#)

View/Update Profile

Fields with * are required

User Information	
User Name	SBirch_ext
Title (Example: Project Director, Director)	Director
Salutation (Example: Mr., Ms., Dr.)	
* First Name	Jillian
Middle Initial	G
* Last Name	Gregory
Generation Qualifier (Example: Jr., Sr., III)	
Highest Degree	MPH, MSN, FNP
Department	HRSA
School	



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**

- <https://help.hrsa.gov/display/EHBSKBFG/>

- **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 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://www.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: <https://targethiv.org/library/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 RSR Instruction manual, and a wealth of other materials related to the RSR.

Note: A new 2022 RSR Instruction Manual will be out later this year.

TA CONTACT INFORMATION

- **Ryan White Data Support**

- 888-640-9356 | RyanWhiteDataSupport@wrma.com

- **The DISQ Team**

- Data.TA@caiglobal.org

- **EHBs Customer Support Center**

- 877-464-4772

- Hours: 7:00 AM – 8:00 PM ET (M-F)

- <http://www.hrsa.gov/about/contact/ehbhelp.aspx>

- **CAREWare Helpdesk**

- 877-294-3571 | cwhelp@jprog.com

- Listserv: <https://list.nih.gov/cgi-bin/wa.exe?SUBED1=careware&A=1>



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, including interpretation of the RSR Instruction Manual and HAB's reporting requirements, 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 needing significant assistance to meet data reporting requirements including helping determine if recipient systems currently collect required data, assisting recipients in extracting data from their systems and reporting it using the required XML schema, and connecting recipients to others that use the same data systems to provide assistance. DISQ also 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, resetting passwords, and making sure that you have the right permissions to complete the 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.

If you are unsure of who to call, feel free to contact any one of the resources provided and they will be able to direct you to the appropriate place.



Connect with HRSA

To learn more about our agency, visit

www.HRSA.gov



Sign up for the HRSA *eNews*

FOLLOW US:



HRSA
Health Resources & Services Administration