



# Overview of HRSA's Electronic Handbooks for Grant Recipients

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

November 12<sup>th</sup>, 2024



Welcome to today's Webinar. Thank you so much for joining us today!  
My name is Margaret. 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.

## Today's Webinar is Presented by:



**Moses Perrone**  
Project Officer, Customer Support Branch  
HRSA Office of Information Technology (OIT)  
[MPerrone@hrsa.gov](mailto:MPerrone@hrsa.gov)



**Margaret Vaaler**  
Abt Associates  
[Data.TA@caiglobal.org](mailto:Data.TA@caiglobal.org)



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

Throughout the presentation, we 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 David is going to chat out the link to the presentation slides right now which include all the resources mentioned in today's webinar.

At any time during the presentation, you'll be able to send us questions using the "Q&A" function on the settings bar on the bottom of the screen. All questions will be addressed at the end of the webinar in our live Q&A portion. During that time, you will also be able to ask questions live if you'd like to unmute yourself and chat with us directly.

Now before we start, I'm going to answer one of the most commonly asked questions about the recording. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar. The slides are already available for you to access on the TargetHIV website using the link that David just chatted out. Please note that these slides are not 508 compliant, but we will follow up with all registrants in about two weeks when the 508 compliant slides and written question and answer are posted.

## Disclaimer

Today's webinar is supported by the following organizations and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, the Health Resources and Services Administration (HRSA), the U.S. Department of Health and Human Services (HHS), or the U.S. government.

The DISQ Team is composed of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling over \$4 Million.

DSAS (Ryan White Data Support) is composed of WRMA, CSR and Mission Analytics and is supported by HRSA of HHS as part of a contract totaling over \$7.2 Million.

Today's webinar is supported by the organizations shown on the slide, and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by the Health Resources and Services Administration, the U.S. Department of Health and Human Services, or the U.S. Government.



Before we begin today's presentation on the Overview of HRSA's Electronic Handbooks for Grant Recipients (EHBs), I am going to pass the presentation to David from the DISQ team to launch the first poll question for today.

What best describes your agency (choose one)?

- Recipient [David read definition-Organization that receives Ryan White funding and/or EHE initiative funding directly from HRSA HAB]
- Recipient/provider [David read definition – Organization that receives Ryan White and/or EHE initiative funding directly from HRSA HAB and provides direct services to clients]
- Provider [David read definition – Organization that receives funding from a HRSA HAB recipient]
- Not sure

Margaret to say this – As I mentioned, today's webinar is for grant recipients-for this poll that means recipients and recipient providers. If you are a provider but not a grant recipient, you're welcome to stay but the information won't apply to you. Providers access the EHBs differently. Providers can find more information in the RSR Instruction Manual and during the Completing the 2024 RSR Provider Report webinar scheduled on January 29<sup>th</sup>.

## 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



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



**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](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 HIV/AIDS Program 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 and recipient/providers should use the EHBs to access their RSR Report(s)
- Providers will access the RSR through a different process
  - RSR Instruction Manual - <https://targethiv.org/library/rsr-manual>
  - Completing the 2024 RSR Provider Report webinar – register at <https://targethiv.org/library/completing-rsr-provider-report>



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

Providers access the EHBs differently. Providers can find more information in the RSR Instruction Manual and during the Completing the 2024 RSR Provider Report webinar scheduled on January 29<sup>th</sup>.

## EHBs SYSTEM REQUIREMENTS – TEST YOUR SETTINGS

The screenshot shows the Login.Gov interface for Applicants/Grantees. The main content area includes a 'What's New' section with two announcements about the HRSA Data Collection Platform for OAT, CBD, RSID, and HSD Performance Reports, and for FORHP Performance Reports. Below this, there are sections for 'Learning' (Grant Program, Free Clinic Program, FQHC-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 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, Monday through Friday).

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 currently complying with your system settings or for a full list of troubleshooting FAQs, read our Recommended Settings Guide of SYSTEM REQUIREMENTS.

Requirements	Minimum Requirements	Recommended Settings	Your Values	Check
 Browser	Microsoft Edge version 88 or higher Mozilla Firefox 3.0 or higher	Microsoft Edge version 88 or higher Mozilla Firefox 11.0	Chrome 118.0	✓
 Javascript	Enabled	Enabled	Enabled	✓
 Screen Resolution	1024 x 768 and above	1280 x 960	1707 x 960	✓
 Cookie	Enabled	Enabled	Enabled	✓
 Popup Blocker	Enabled	Enabled	Enabled	✓
 Date & Time	Current	10/16/2023 3:02:50 PM ET ( GMT-4:00 )	10/16/2023 3:02:50 PM ET ( GMT-4:00 )	✓
 ActiveX	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

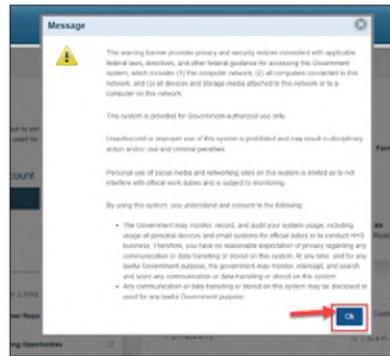
- From “grants.hrsa.gov”, select “Applicant/Grantee



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

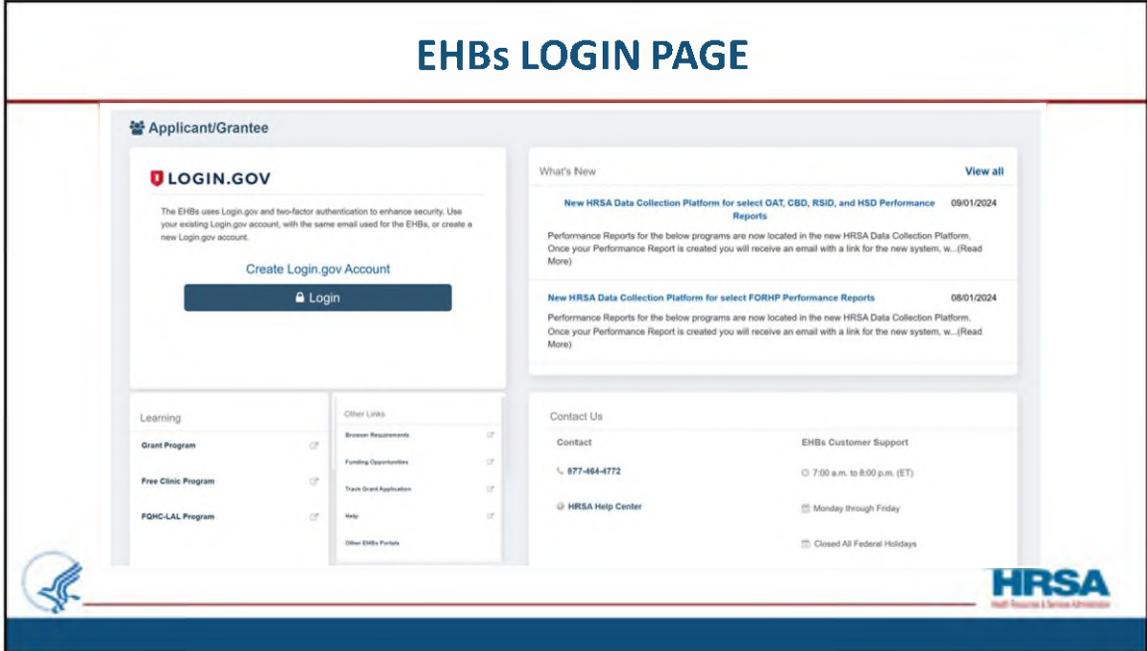
## LOGGING INTO THE EHBs

- 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



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 with the following sections:

- Section A:** Applicant/Grantee LOGIN.GOV. It includes instructions on using Login.gov and two-factor authentication, a "Create Login.gov Account" link, and a "Login" button.
- Section B:** What's New. It features two announcements about the new HRSA Data Collection Platform for select OAT, CBD, RSID, and HSD Performance Reports, and for select FORHP Performance Reports. Each announcement includes a "View all" link.
- Section C:** Learning and Other Links. The Learning section includes links for Grant Program, Free Clinic Program, and FQHC-LAL Program. The Other Links section includes links for Browser Requirements, Funding Opportunities, Track Grant Application, Help, and Other EHBs Pages.
- Section D:** Contact Us. It provides contact information for EHBs Customer Support, including the phone number 877-464-4772, the HRSA Help Center, and the support hours: 7:00 a.m. to 8:00 p.m. (ET) Monday through Friday, closed all federal holidays.

The HRSA logo is visible in the bottom right corner of the page.

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.

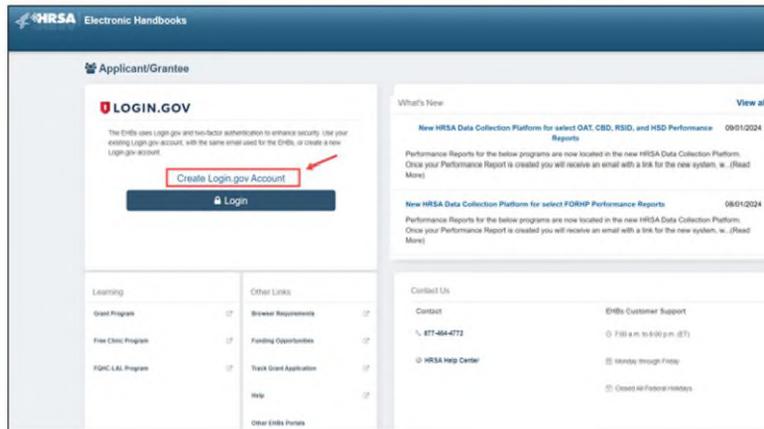
Section "B" is the "**What's New**" section. This displays important information and updates to the EHBs. You can always select the message or 'View All' to read more.

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.



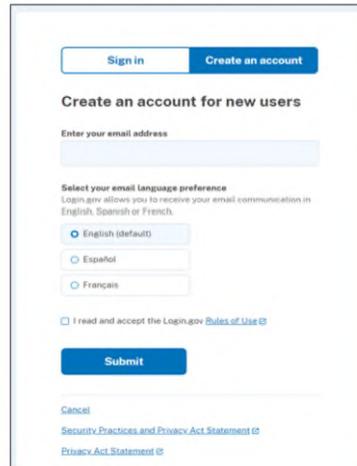
So you'll notice that at the “Login.Gov” page, you'll be given two choices:

- 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' form on Login.gov. At the top, there are two buttons: 'Sign in' and 'Create an account'. Below this, the form is titled 'Create an account for new users'. It includes a text input field for 'Enter your email address'. Underneath, there is a section for 'Select your email language preference' with the text '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'. Below the language options is a checkbox for 'I read and accept the Login.gov Rules of Use'. A blue 'Submit' button is located at the bottom of the form. At the very bottom of the form, there are links for 'Cancel', 'Security Practices and Privacy Act Statement', and 'Privacy Act Statement'.



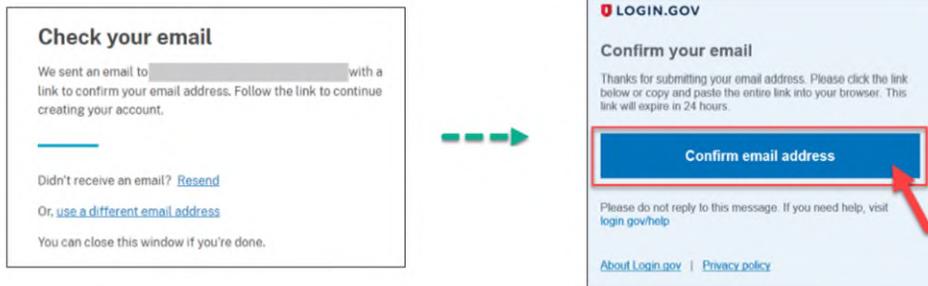
You'll then be prompted to enter your email address, select the preferred language, and read and accept the Rules of Use.

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

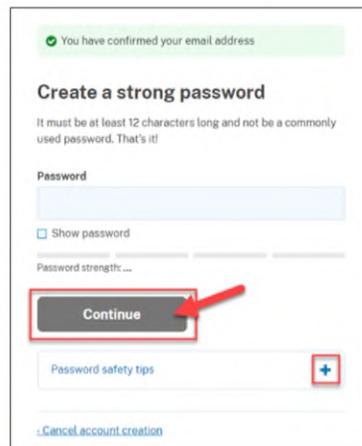


After clicking Submit you will receive a confirmation email to the address used to create the account.

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 the instruction: "It must be at least 12 characters long and not be a commonly used password. That's it!". There is a "Password" input field, a "Show password" checkbox, and a "Password strength..." indicator. A red box highlights the "Continue" button, with a red arrow pointing to it. Below the "Continue" button is a "Password safety tips" section with a plus sign icon. At the bottom left of the form, there is a link for "Cancel account creation".



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”

A screenshot of the LOGIN.GOV 'Your account' page. The page is titled 'LOGIN.GOV' and 'Your account'. It features a navigation menu on the left with options like 'Add email address', 'Edit password', 'Delete account', 'Your authentication methods', 'Your connected accounts', 'History', and 'Customer support'. The main content area is divided into sections: 'Email preferences' with an 'Add new email' button, 'Language' set to 'English' with an 'Edit' button, 'Password' with an 'Edit' button, and 'Phone numbers' with an 'Add phone' button. The HRSA logo is visible in the bottom right corner of the screenshot.

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



**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.

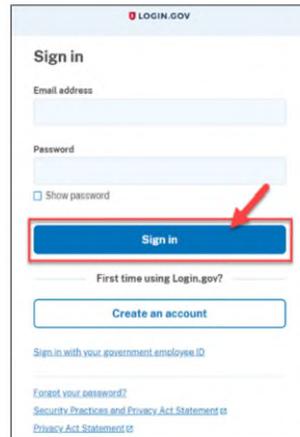
Create Login.gov Account



If you already have an existing [Login.gov](#) account, simply select login. I'll cover what to do if you don't have an account in a moment.

## 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

The screenshot displays the EHBs Login Page. At the top, there is a header with the text "EHBs LOGIN PAGE". Below the header, a bullet point states: "Keep a lookout for alerts at the top of the Homepage". The main content area is titled "Applicant/Grantee" and is divided into two columns. The left column features the "LOGIN.GOV" logo and a message: "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." Below this message are two buttons: "Create Login.gov Account" and "Login". The right column is titled "What's New" and includes a "View all" link. It contains two news items, both dated 09/01/2024. The first item is titled "New HRSA Data Collection Platform for select OAT, CBD, RSID, and HSD Performance Reports" and states: "Performance Reports for the below programs are now located in the new HRSA Data Collection Platform. Once your Performance Report is created you will receive an email with a link for the new system. w... (Read More)". The second item is titled "New HRSA Data Collection Platform for select FORHP Performance Reports" and states: "Performance Reports for the below programs are now located in the new HRSA Data Collection Platform. Once your Performance Report is created you will receive an email with a link for the new system. w... (Read More)". At the bottom of the page, there is a logo on the left and the "HRSA Health Resources & Services Administration" logo on the right.

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

## New to EHBs?

- If you are new to the EHBs, you will have to complete two additional steps that I won't be covering today:
  - **Step 1: Create EHBs Account**
  - **Step 2: Submit a request to register to your organization**



<https://help.hrsa.gov/display/public/EHBSKBFG/Video+-+Getting+Started+in+the+EHBs>



**HRSA**  
Health Resources & Services Administration

If you are new to the EHBs, you'll have to create an EHBs account and also submit a request to register to your organization. I won't be covering these steps today but don't worry. The video **Getting Started in the EHBs** is less than 5 minutes and will provide step by step guidance on completing these two steps. I've included the link on this slide so you can access the video and it is on the resource list that was chatted out earlier.

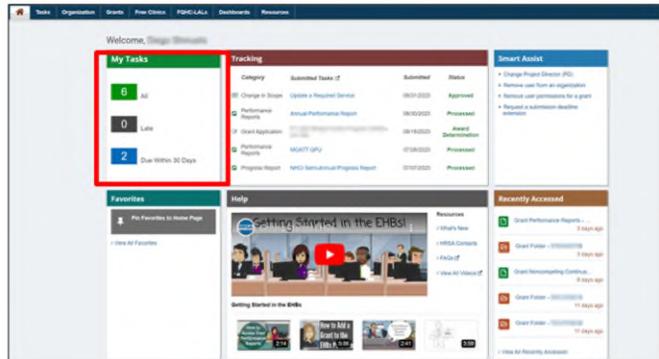
## GRANT LEVEL REGISTRATION



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

After creating your EHB account and adding your organization to your portfolio you'll need to Add 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.



## 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 CRS-EIN 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

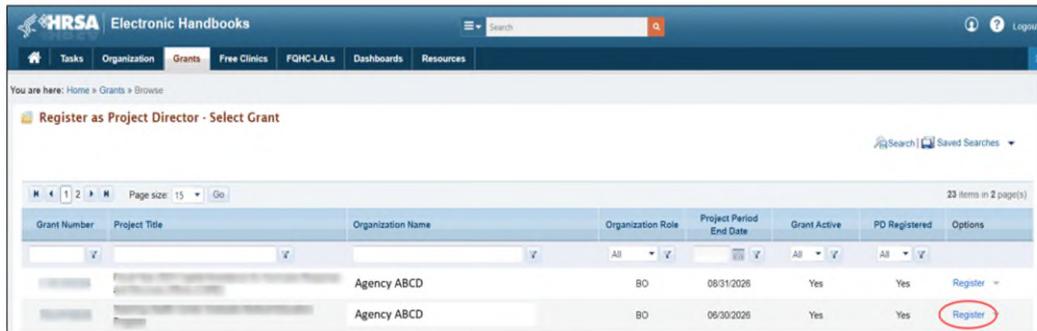
Last Login: 09/18/22 9:36:00 AM ET

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.)



You are here: Home » Grants » Browse

Register as Project Director - Select Grant

Page size: 15 Go 23 items in 2 page(s)

Grant Number	Project Title	Organization Name	Organization Role	Project Period End Date	Grant Active	PO Registered	Options
		Agency ABCD	BO	08/31/2026	Yes	Yes	Register
		Agency ABCD	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.



## 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



**HRSA**  
Health Resources & Services Administration

## 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 (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)

- Performance Reports
- View Awards
- Prior Approval Request
- Program Specific
- Noncompeting Continuations
- Progress Reports
- 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.

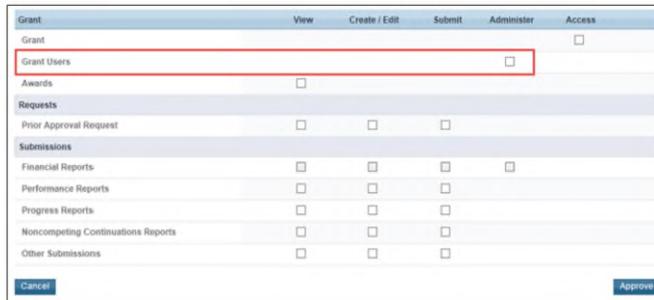
So, you will need Performance Report privileges to access the RSR.

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 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.

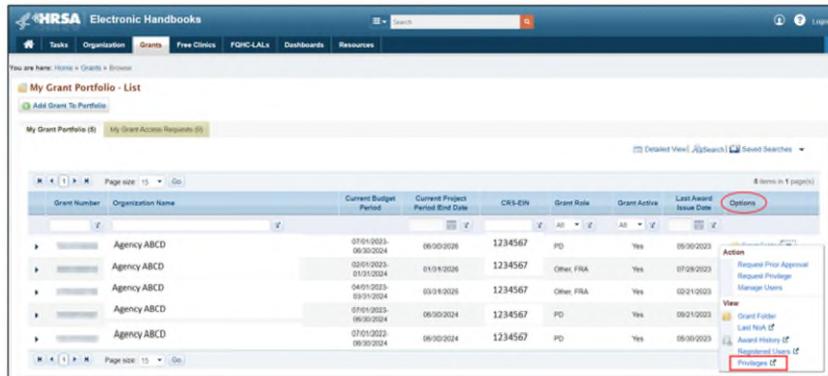
The project director is listed on the Notice of Award. Any change to the project director needs to be noted on that Notice of Award.

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



The screenshot displays the HRSA Electronic Handbooks interface. The main content area shows a table titled "My Grant Portfolio - List" with columns for Grant Number, Organization Name, Current Budget Period, Current Project Period End Date, CDS-EIN, Grant Rate, Grant Active, and Last Award Issue Date. The "Options" column is circled in red. A dropdown menu is open for the first row, showing options like "Request Prior Approval", "Request Privilege", "Manage Users", "View", "Grant Folder", "Last N/A", "Award History", and "Registered Users". The "Privileges" option is highlighted in red.

Grant Number	Organization Name	Current Budget Period	Current Project Period End Date	CDS-EIN	Grant Rate	Grant Active	Last Award Issue Date	Options
	Agency ABCD	07/01/2023-06/30/2024	06/30/2026	1234567	PD	Yes	06/30/2023	Action Request Prior Approval Request Privilege Manage Users View Grant Folder Last N/A Award History Registered Users Privileges
	Agency ABCD	02/01/2023-01/31/2024	01/31/2026	1234567	Other: FBA	Yes	07/28/2023	
	Agency ABCD	04/01/2023-03/31/2024	03/31/2026	1234567	Other: FBA	Yes	02/11/2023	
	Agency ABCD	01/01/2023-06/30/2024	06/30/2024	1234567	PD	Yes	06/11/2023	
	Agency ABCD	07/01/2023-06/30/2024	06/30/2024	1234567	PD	Yes	06/30/2023	

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.

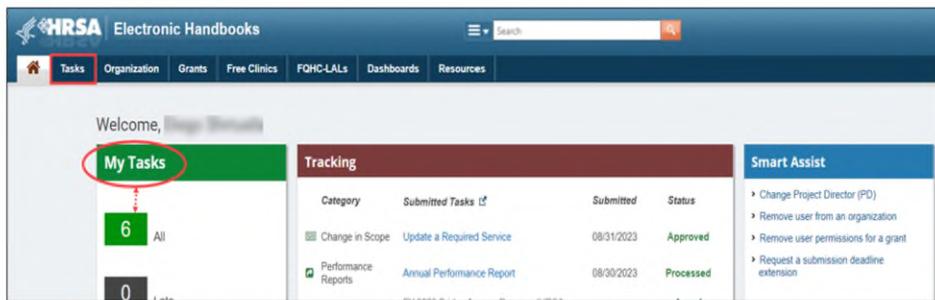
Pending tasks include:

- 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 displays the HRSA Electronic Handbooks interface. At the top, there is a navigation bar with the HRSA logo and the text "Electronic Handbooks". Below this is a search bar and a menu bar with options: Home, Tasks, Organization, Grants, Free Clinics, FOHC-LALs, Dashboards, and Resources. The "Tasks" tab is highlighted. Below the navigation bar, there is a welcome message "Welcome, [User Name]". The main content area is divided into three sections: "My Tasks", "Tracking", and "Smart Assist". The "My Tasks" section shows a green box with the number "6" and the text "All". The "Tracking" section contains a table with columns for Category, Submitted Tasks, Submitted, and Status. The "Smart Assist" section lists several actions: Change Project Director (PD), Remove user from an organization, Remove user permissions for a grant, and Request a submission deadline extension.

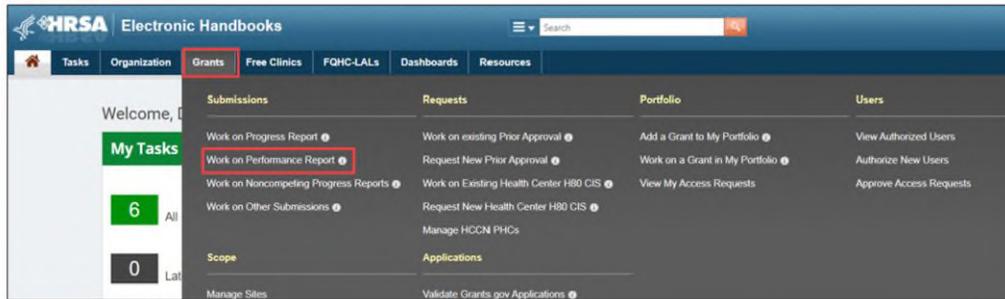
Category	Submitted Tasks	Submitted	Status
Change in Scope	Update a Required Service	08/31/2023	Approved
Performance Reports	Annual Performance Report	08/30/2023	Processed

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

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

The screenshot shows the 'Submissions - All' search page. On the left is a navigation menu with categories like 'ALL TASKS', 'Tasks', 'Grants', 'Requests', 'Submissions', and 'User Access Requests'. The main content area is titled 'Submissions - All' and includes tabs for 'Not Completed', 'Recently Completed', and 'All'. Below the tabs are search filters: 'Basic Search Parameters' with fields for 'Grant Number', 'Submission Tracking Number', and 'Submission Deadline'; 'Advanced Search Parameters' (highlighted with a green box); and 'Display Options' with a 'Sort Method' dropdown. On the right, there are dropdowns for 'Submission Name Like', 'Organization' (with 'All' selected and a red arrow pointing to the 'All' checkbox), and 'Submission Type' (with 'Historical Reports' selected and a yellow arrow pointing to the dropdown). At the bottom right, there is a 'Search Name' field, a 'Save Parameters' button, and a 'Search' button. An 'Export To Excel' link is at the bottom left.



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.

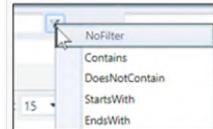
Notice that you also have the Advanced Search Parameters section if needed, as shown in green box.

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 Performance Report	Performance Reports	Agency ABCD			01/01/2022-06/30/2023	07/31/2023	08/30/2023	Submitted	Performance Reports
MDATT QPU	Performance Reports	Agency ABCD			04/01/2023-06/30/2023	08/27/2023	07/28/2023	Submitted	Performance Reports
MDATT QPU	Performance Reports	Agency ABCD			01/01/2023-03/31/2023	05/31/2023	05/01/2023	Submitted	Performance Reports
LEIS Performance Report	Performance Reports	Agency ABCD			01/01/2022-12/31/2022	03/08/2023	03/08/2023	Submitted	Performance Reports
RSR 2022 Annual Performance Report	Performance Reports	Agency ABCD			01/01/2022-12/31/2022	03/27/2023	02/07/2023	Submitted	Performance Reports
Annual Performance Report	Performance Reports	Agency ABCD			07/01/2021-06/30/2022	08/01/2022	08/23/2022	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.



## 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 (Date), Task Category, Tracking #, Task, Entity, and Organization. The first row shows a deadline of 04/30/2024 for "Grant Submissions" under "Other Submissions" for "Agency ABCD". The second row shows a deadline of 11/11/2023 for "Grant Submissions" under "Noncompeting Continuations" for "Agency ABCD". The third row shows a deadline of 10/30/2023 for "Grant Submissions" under "Other Submissions" for "Agency ABCD". The fourth row shows a deadline of 10/30/2023 for "Grant Submissions" under "Other Submissions" for "Agency ABCD". The fifth row shows a deadline of 11/30/2023 for "Grant Submissions" under "Other Submissions" for "Agency ABCD". The sixth row shows a deadline of N/A for "CRS Applications" under "New-Existing CRS" for "Agency ABCD". The seventh row shows a deadline of N/A for "CRS Applications" under "New-Existing CRS" for "Agency ABCD". The left sidebar has a "Submissions" link highlighted with a red box. The top of the page has a search bar and filter options.

Deadline (Date)	Task Category	Tracking #	Task	Entity	Organization	Options
04/30/2024 (253 Days)	Grant Submissions		Other Submissions	(Grant)	Agency ABCD	Help
11/11/2023 (18 Days)	Grant Submissions		Noncompeting Continuations	(Grant)	Agency ABCD	Help
10/30/2023 (25 Days)	Grant Submissions		Other Submissions	(Grant)	Agency ABCD	Help
10/30/2023 (25 Days)	Grant Submissions		Other Submissions	(Grant)	Agency ABCD	Help
11/30/2023 (25 Days)	Grant Submissions		Other Submissions	(Grant)	Agency ABCD	Help
N/A	CRS Applications		New-Existing CRS	(Grant)	Agency ABCD	Help
N/A	CRS Applications		New-Existing CRS	(Grant)	Agency ABCD	Help



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	Agency ABCD			07/01/2022 - 09/30/2023	10/30/2023	Not Started	Start
20 Days	T91 Information Request	Other Submissions	Agency ABCD			07/01/2022 - 09/30/2023	10/30/2023	Not Started	Start
Due: In more than 30 Days (2)									
38 Days	Noncompeting Continuation Progress Report	Noncompeting Continuations	Agency ABCD			04/01/2024	11/17/2023	In Progress	Edit
203 Days	NHCLHC Annual Expenditure Report	Other Submissions	Agency ABCD			03/01/2023 - 01/31/2024	04/30/2024	In Progress	Edit

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

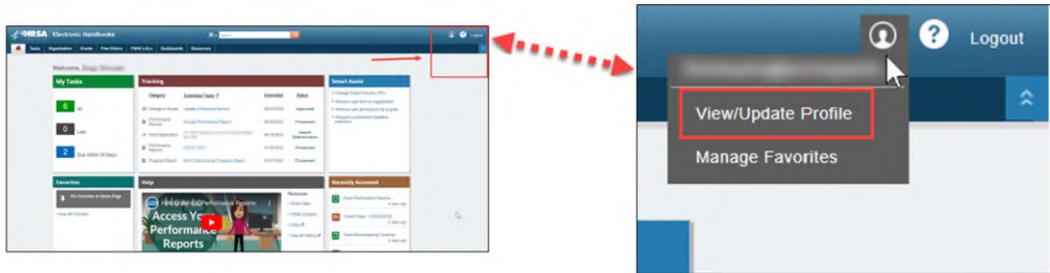


Once done, you'll be taken to the Submissions section.

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



**HRSA**  
Health Resources & Services Administration

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**

Profile with \* has been updated

**Personal Information**

Title: Director of Quality & Clinical Practice Improvement  
Organization: Kaiser Permanente (Organization)  
Address: 1000 Broadway, San Francisco, CA 94107  
Email Address: [redacted]@kp.org  
Phone Number: [redacted]

**Contact Information**

Email Address: [redacted]@kp.org  
Phone Number: [redacted]

**Address**

Address: 1000 Broadway, San Francisco, CA 94107  
City: San Francisco  
State: CA  
Zip Code: 94107

**Save** **Cancel**



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.

# RWHAP Technical Assistance Resources

- The [RWHAP TA Resources Brochure](#) features information on each RWHAP technical assistance provider, including:
  - RWHAP reports they support
  - Questions they frequently respond to
  - Contact information

**Ryan White HIV/AIDS Program TA Resources**

<p><b>RWHAP Data Support</b></p> <p>Reports: RWHAP, ARIC, DISE, HIVGAP, FTR/Infectious Report, Expedited Report, QIDS, and DISE</p> <p>The Ryan White Data Support team provides support to providers related to data report creation and submission, data validation, and interpretation of the resulting results and HIV/AIDS reporting requirements. They can address such issues as:</p> <ul style="list-style-type: none"> <li>• I don't understand something in the instructional manual</li> <li>• I don't understand a reporting requirement</li> <li>• What is the allowable response for a given data element?</li> <li>• I received a submission message (print, warning, error) and I don't know how to fix it</li> <li>• What is my organization's relationship with our assigned implementation provider?</li> <li>• How do I change my report's submission date?</li> <li>• I need the report returned to me for changes</li> <li>• I don't understand a unique identifier/number change and what variables are included in that category?</li> </ul>	<p><b>DATA SUPPORT</b></p> <p>1-888-468-8386 Hours: 10am-3pm ET, M-F Email: <a href="mailto:DataSupport@hrsa.gov">DataSupport@hrsa.gov</a> Target HIV - Data Support</p>
<p><b>Data Integration, Systems and Quality (DISQ) Team</b></p> <p>Reports: RWHAP, ARIC, DISE, HIVGAP</p> <p>The DISQ team aims to enhance the completeness, accuracy and consistency of RWHAP observational data through capacity building, training and technical assistance (TA) for recipients and providers. They can address such issues as:</p> <ul style="list-style-type: none"> <li>• I'm a new user and I don't know where to start</li> <li>• I need help with my client level data</li> <li>• What is the data reporting schema and how do I use it for my reports?</li> <li>• How do I create an XML file?</li> <li>• How do I use TRAC?</li> <li>• How do I integrate data from multiple sources?</li> <li>• How do I use the latest compression report?</li> <li>• I need help addressing a data issue identified in my system-generated report</li> <li>• How do I check the quality of my data?</li> <li>• I need help to improve my organization's strategy for ongoing monitoring and supporting our data</li> <li>• Is there another organization that uses the same data system that I can talk to?</li> </ul>	<p><b>DISQ</b></p> <p>Data Integration, Systems &amp; Quality TECHNICAL ASSISTANCE</p> <p>Data.Support@hrsa.gov Target HIV - DISQ</p>
<p><b>EHBs Customer Support Center</b></p> <p>Reports: RWHAP, ARIC, DISE, HIVGAP, FTR/Infectious Report, Expedited Report, QIDS</p> <p>The EHBs Customer Support Center assists with reporting, monitoring and navigating the EHBs. They can address such issues as:</p> <ul style="list-style-type: none"> <li>• I can't log into the EHBs</li> <li>• I need help registering in the EHBs</li> <li>• I have a challenge with a challenge who is allowed to complete the report</li> <li>• I need help finding my report in the EHBs</li> <li>• I have a web system error</li> </ul>	<p><b>HRSA Technical Handbooks</b></p> <p>1-888-468-4772 Hours: 10am-3pm ET, M-F EHBs.Support</p>
<p><b>CAREWare Help Desk</b></p> <p>Reports: FTR, ARIC, DISE, HIVGAP</p> <p>The CAREWare Help Desk can assist with generating XML files from CAREWare. They can address such issues as:</p> <ul style="list-style-type: none"> <li>• I need help with CAREWare</li> <li>• How do I generate my complete XML file using CAREWare?</li> <li>• How do I create a custom report in CAREWare?</li> <li>• How do I import data from another system into CAREWare?</li> </ul>	<p><b>jProgr</b></p> <p>1-877-294-2571 Hours: 10am-5pm ET (Mon-Fri) and 10:30-4:30pm ET (Tue-Thu) <a href="mailto:support@jprogr.com">support@jprogr.com</a></p>
<p><b>Contact Your Project Officer</b></p> <p>They can address such issues as:</p> <ul style="list-style-type: none"> <li>• I have questions about an organization's RWHAP program</li> <li>• I need help with my program report</li> <li>• I have a question about my grant funding</li> <li>• I need to meet the report deadline?</li> <li>• My organization is interested, and my provider is not submitting their data on time</li> <li>• My organization did not collect all the required data. What do I do?</li> </ul>	<p><b>HRSA</b></p> <p>Health Resources &amp; Services Administration HRSA Employee Directory</p>

This may feel like a lot to do, but there are several technical assistance resources available to help you. The RWHAP TA Resources brochure outlines information about each technical assistance provider, including the reports they support, frequently asked questions they respond to, and their best contact information. You can find this resource on the TargetHIV website.

Most importantly, please don't forget that there is no wrong door for TA – if we can't assist you, we're happy to refer you to someone who can!



## Connect with HRSA

To learn more about our agency,  
visit

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



Sign up for the HRSA eNews

FOLLOW US:



Finally, to connect with and find out more about HRSA, check out HRSA.gov. Now I will turn it over to Margaret for our Q&A session.

## 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 - And now to your questions – but first, 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 David 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.