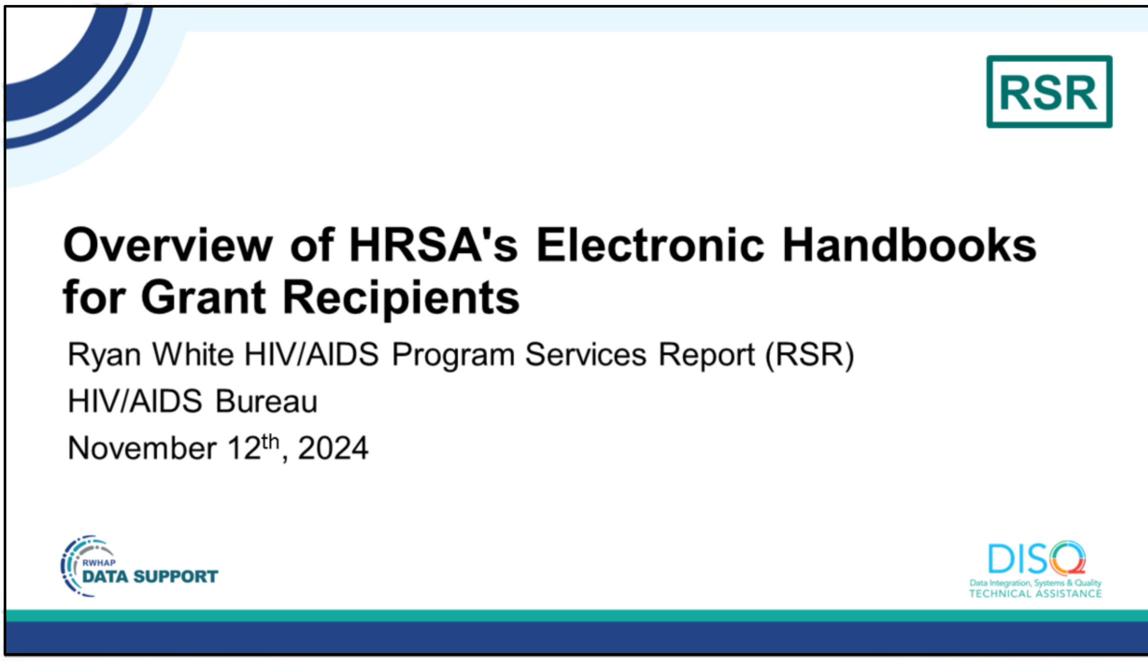


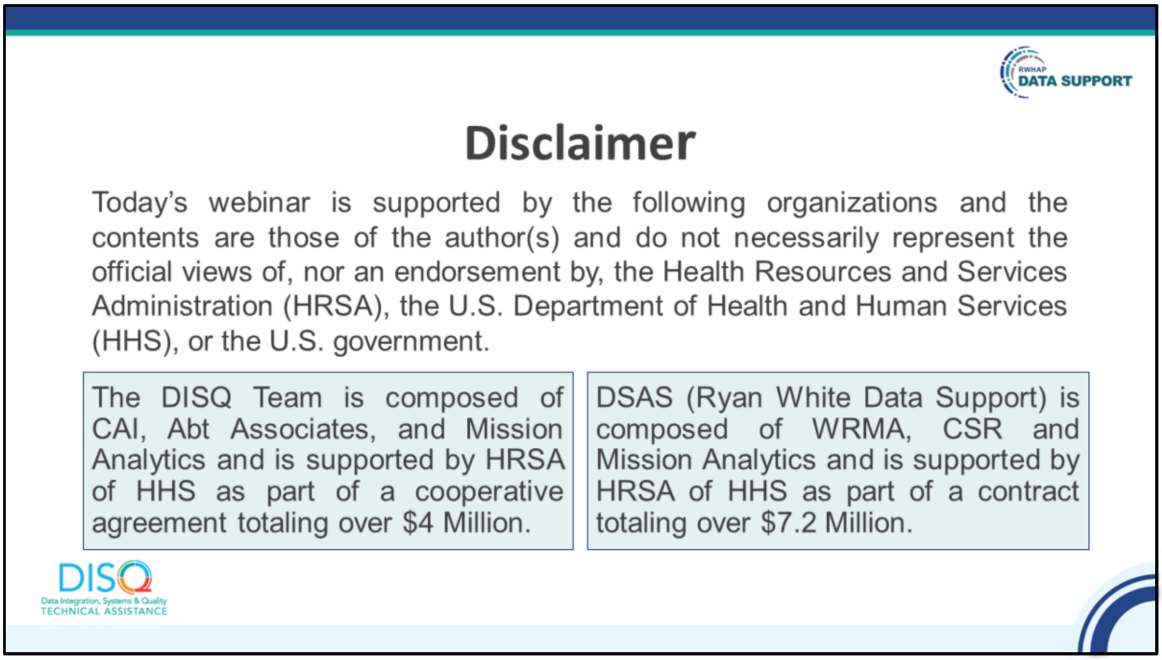
Welcome to today's Webinar. Thank you so much for joining us today!
My name is Margaret. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for the RSR.

Today's webinar 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.



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 29th.

AGENDA

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

HRSA
Health Resources & Services Administration

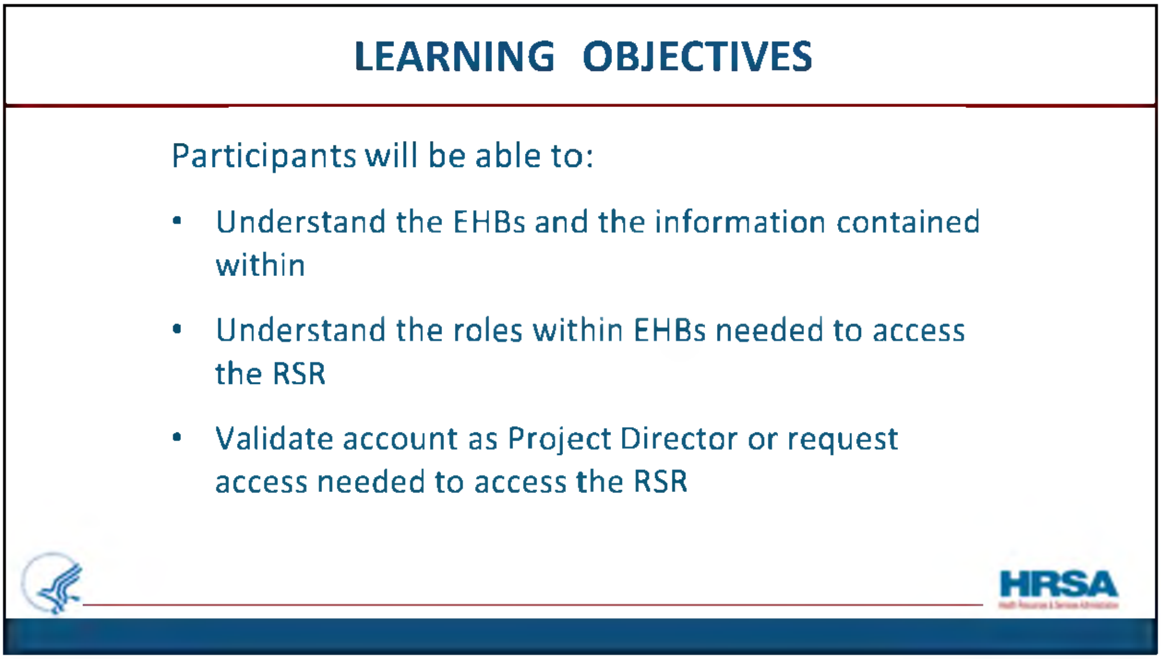
Hello, everyone! During today’s webinar we will cover:

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.

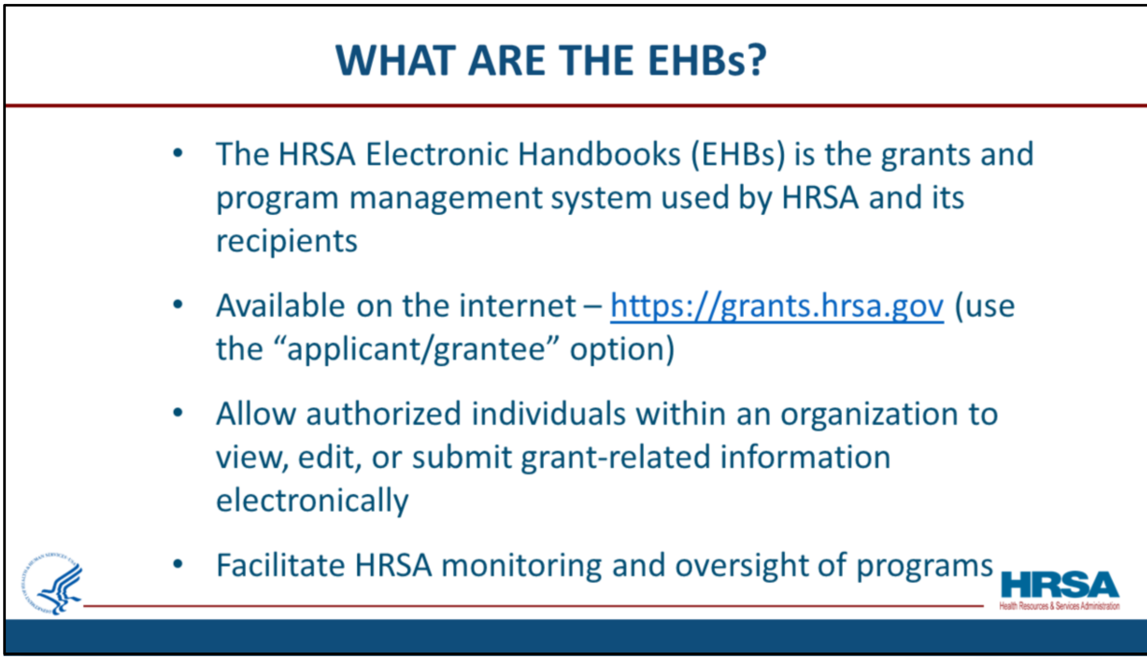


After today's session, participants should be able to:

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

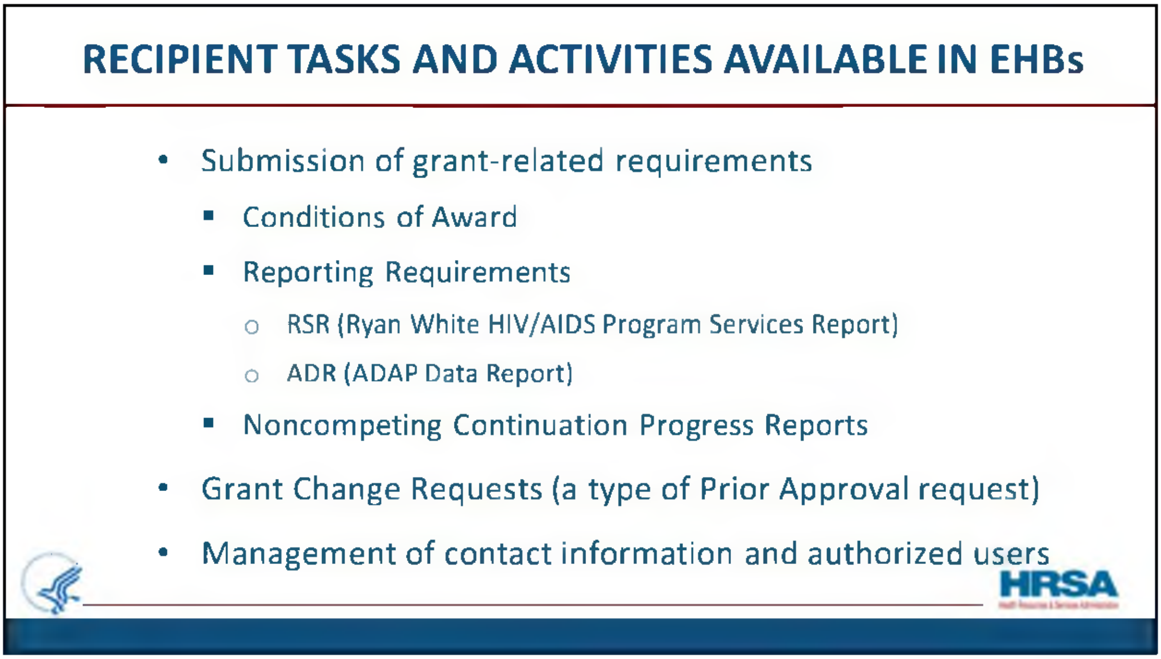
And now, a quick overview of the EHBs…



What are the EHBs?

The HRSA Electronic Handbooks – 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 HRSAs monitoring and oversight of programs.



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

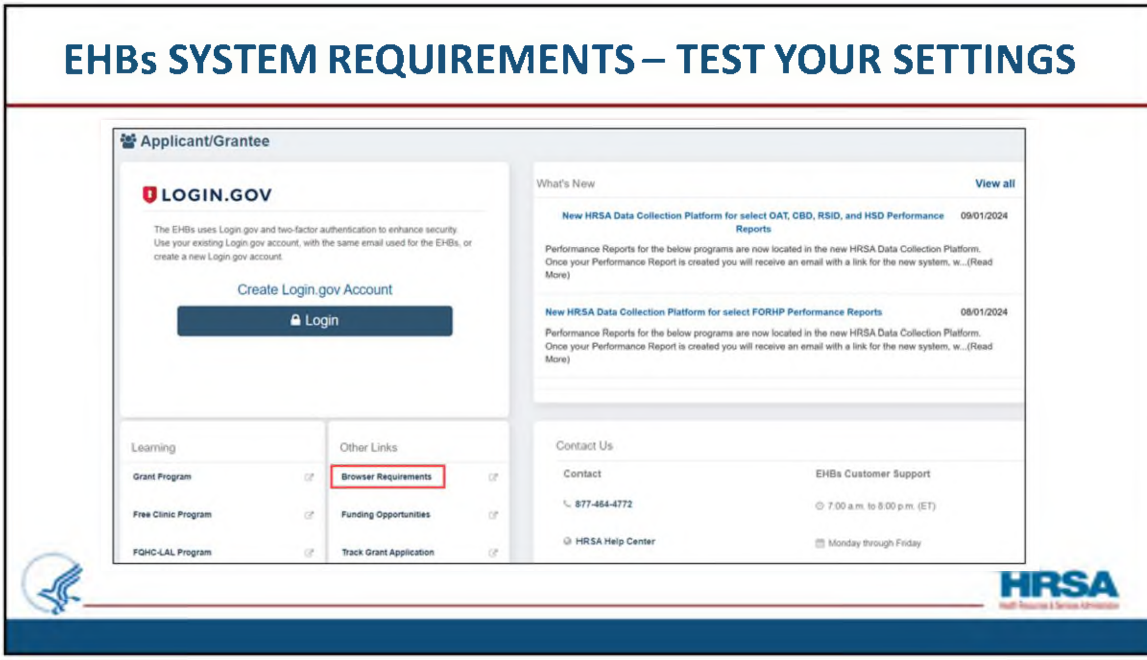
Activity	Location
Competing Application Submission	www.grants.gov
Draw down of federal funds	www.dpm.psc.gov
Submission of Quarterly Federal Financial Report (FFR) to PMS	www.dpm.psc.gov
Changes to Organization Information	www.sam.gov

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 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 29th.

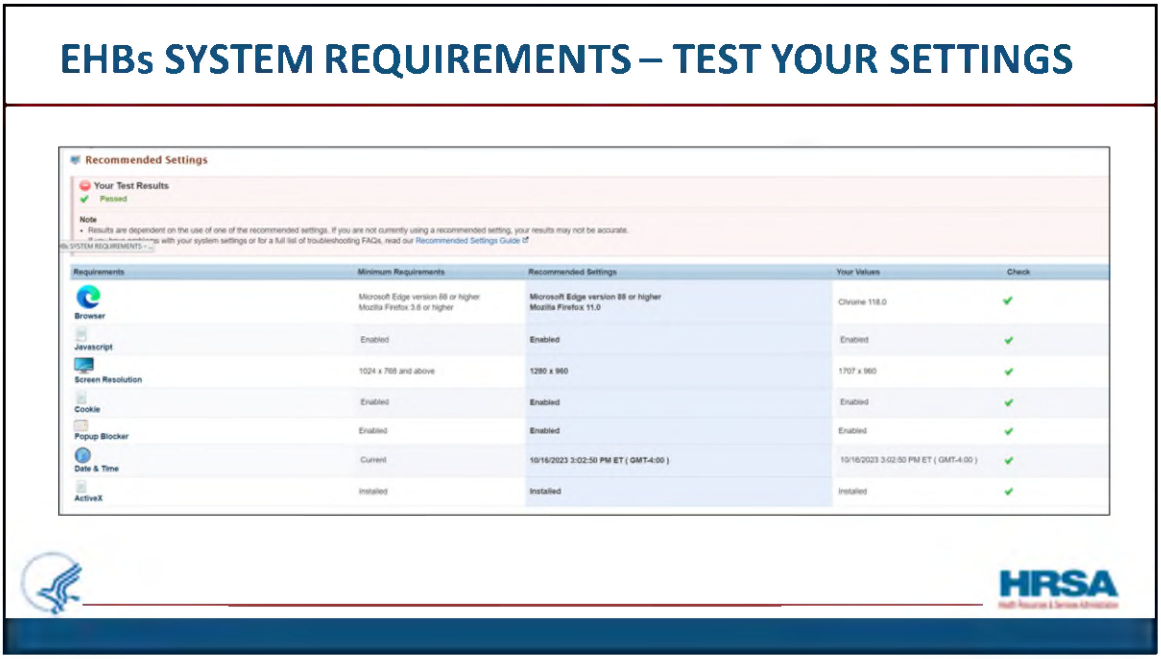


This is a screen shot of the Login.Gov page.   Looking towards the bottom left, locate the Browser Requirements link, shown here in the red box.

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

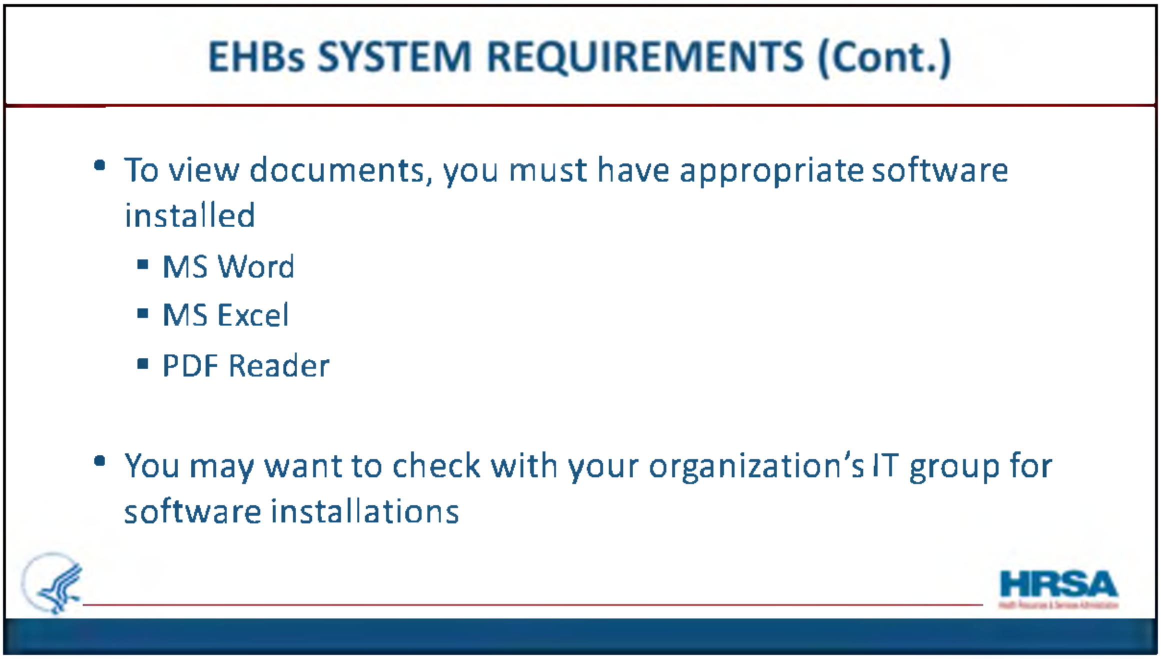
After a quick test is done by your system, the resulting screen will show you how your computer settings compare to the minimum and recommended settings for the EHBs.

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.



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.



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.

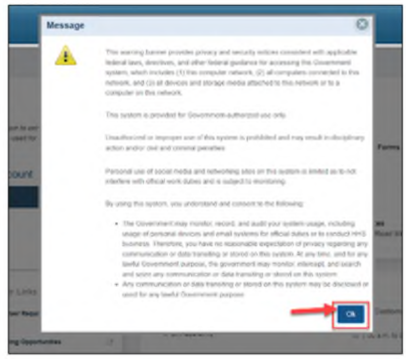
LOGGING INTO THE EHBs

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

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

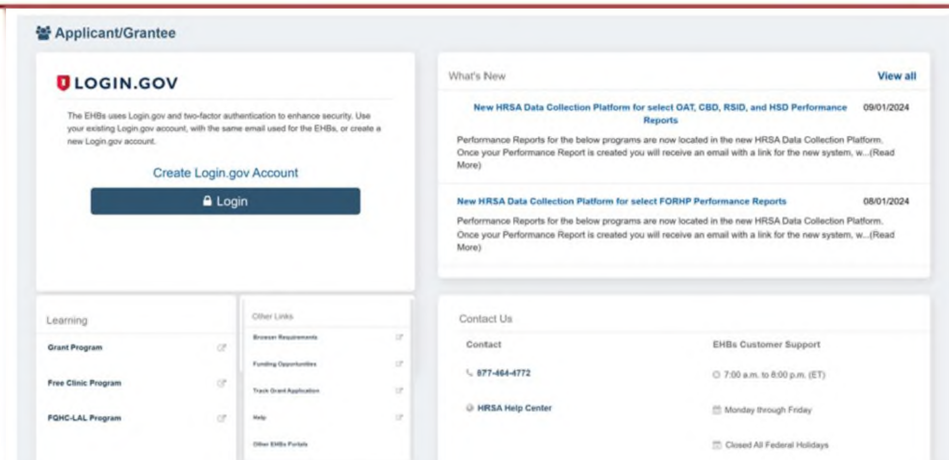
LOGGING INTO THE EHBs

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

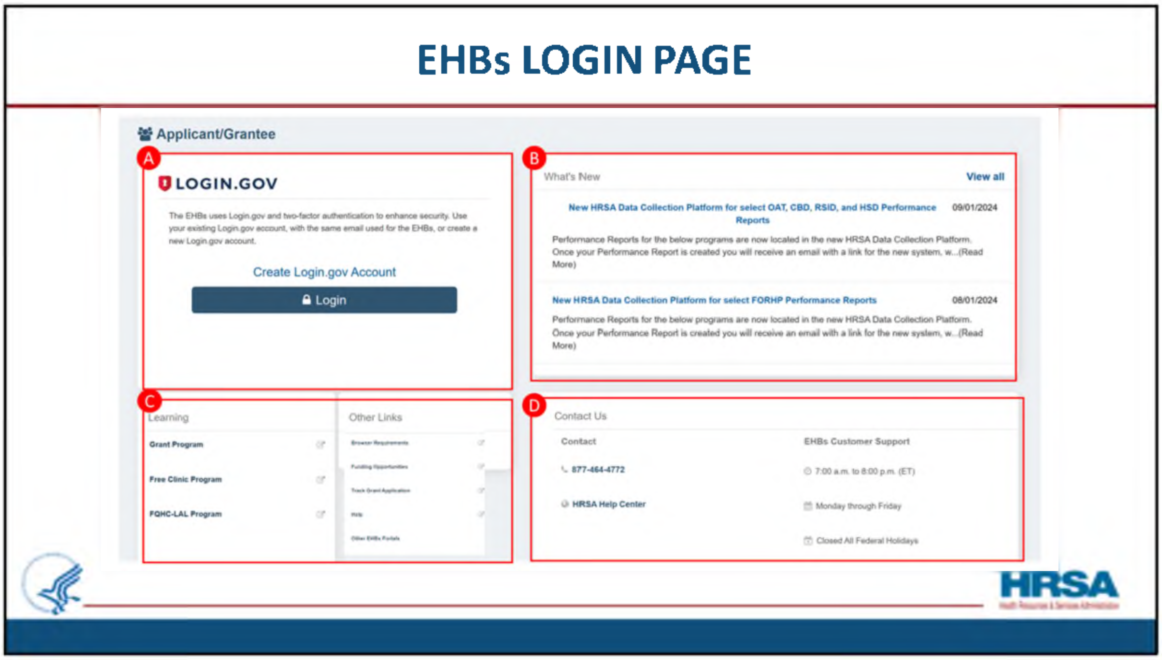


Review the warning banner and select Ok to continue to the EHBs login page.

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.



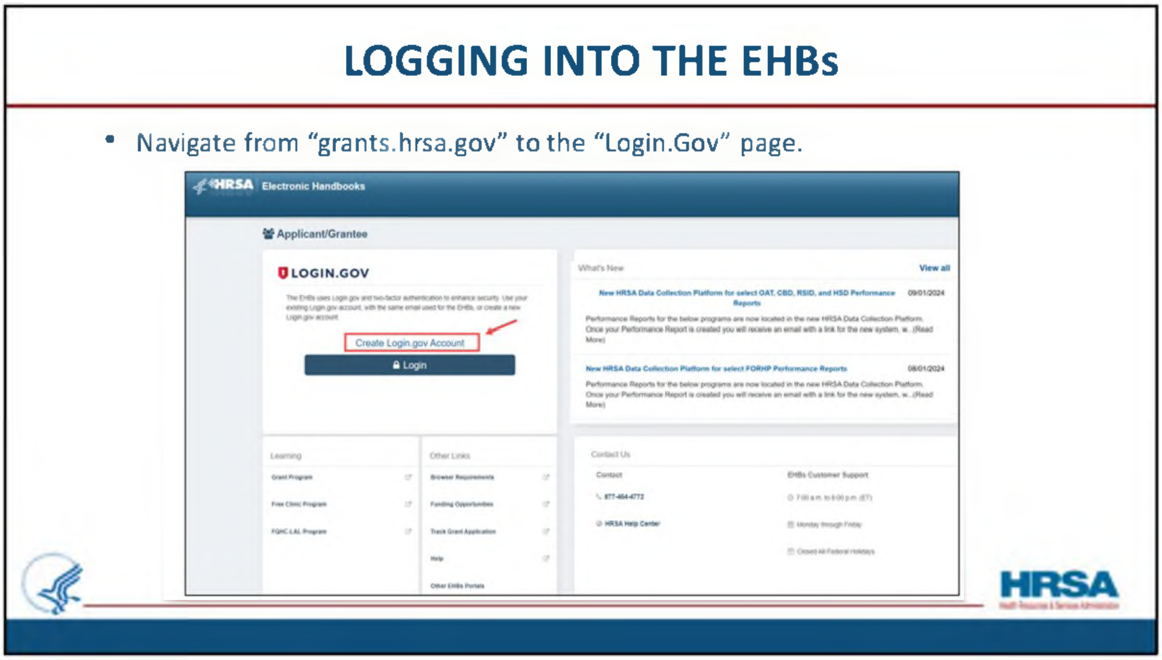
I've broken the page down into 4 sections: A, B, C, and D.

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.



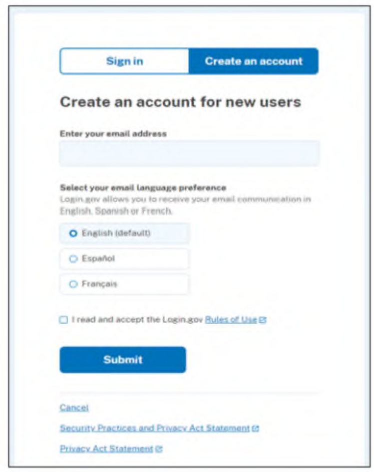
So you'll notice that at the "Login.Gov" page, you'll be given two choices:

- 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



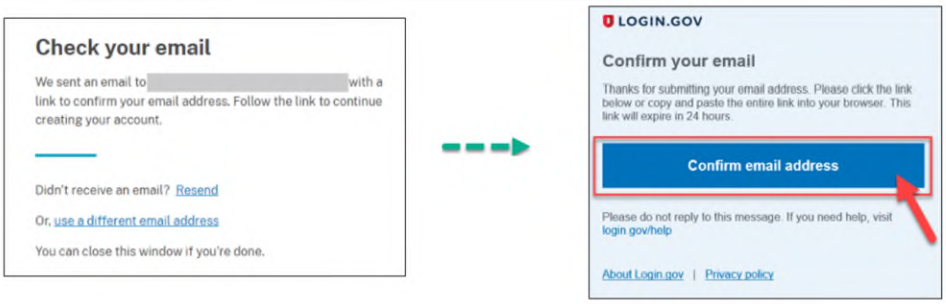
You'll then be prompted to enter your email address, select the preferred language, and read and accept the Rules of Use.

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**.

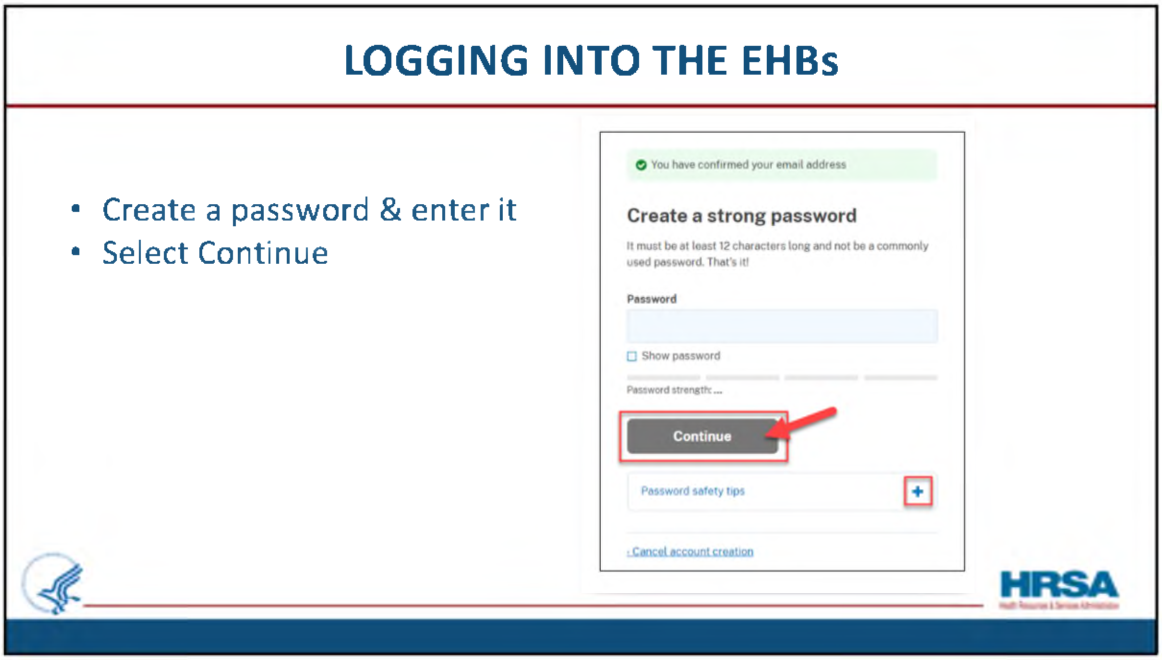
LOGGING INTO THE EHBs

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



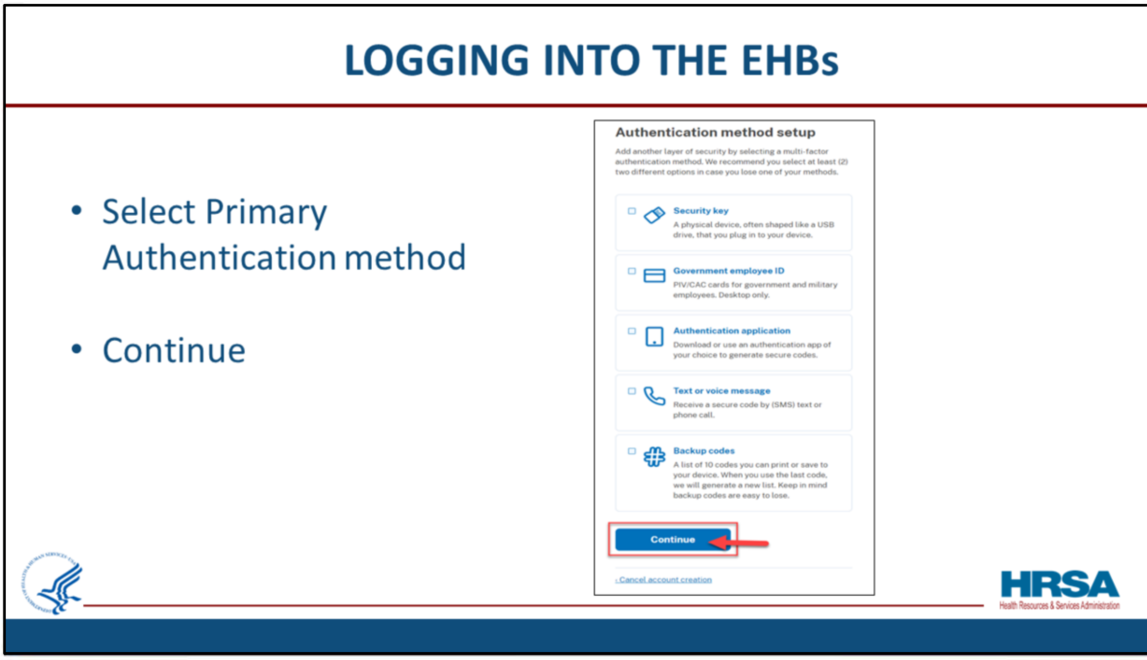
After clicking Submit you will receive a confirmation email to the address used to create the account.

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



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.

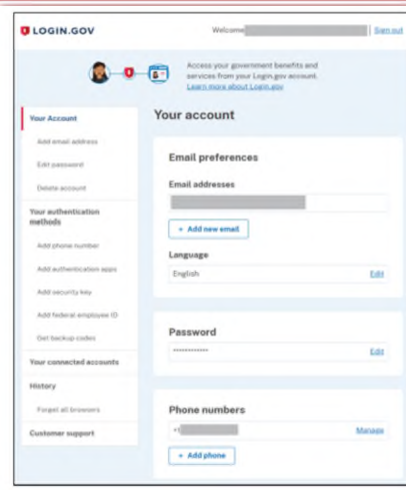


Next select a primary **Authentication method** to be used for two-factor authentication and click **Continue**.
The authentication method helps ensure your account is secure.

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"

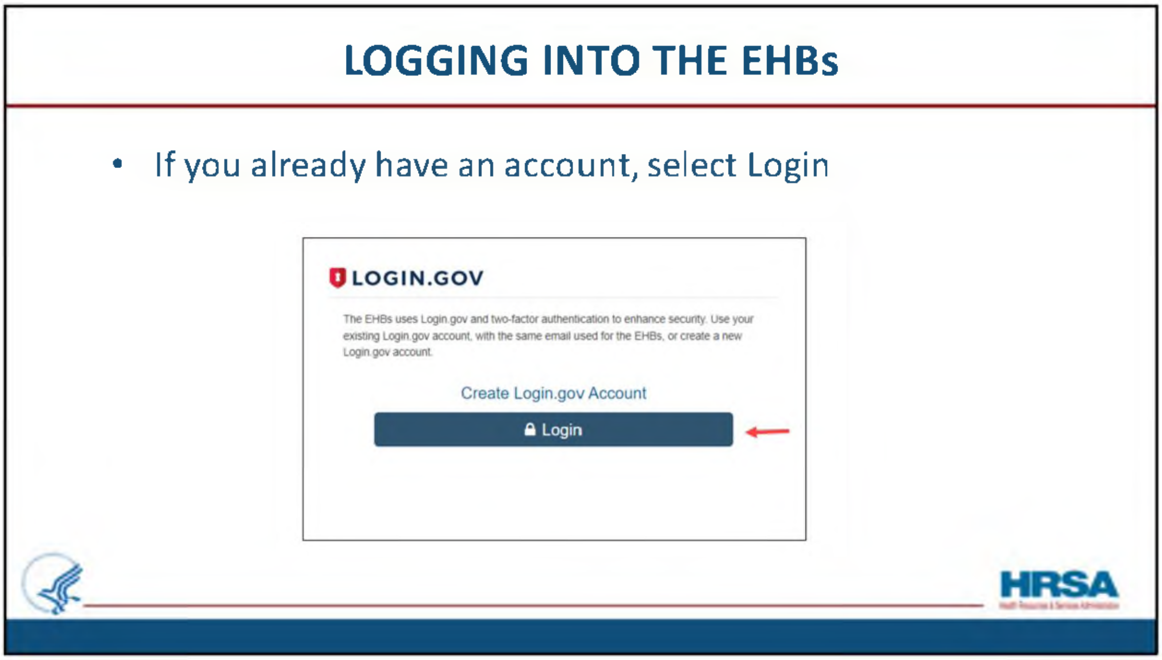


After completing the steps, you will land on "Your account" page.

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

You can add or edit any information as needed.

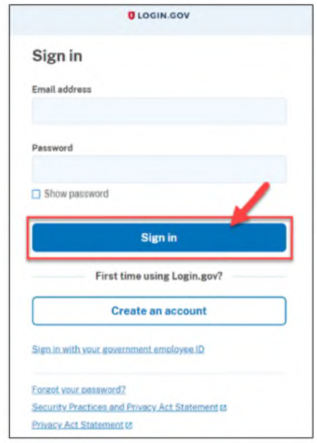
When done, simply go back to "grants.hrsa.gov" to select the "Applicant/Grantee" card.



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



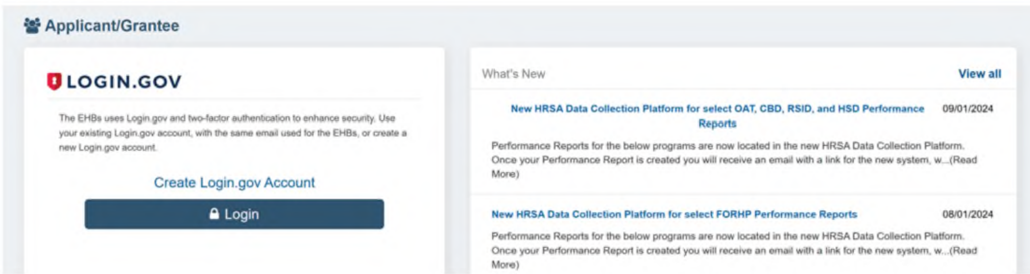
Enter your email address and password.

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

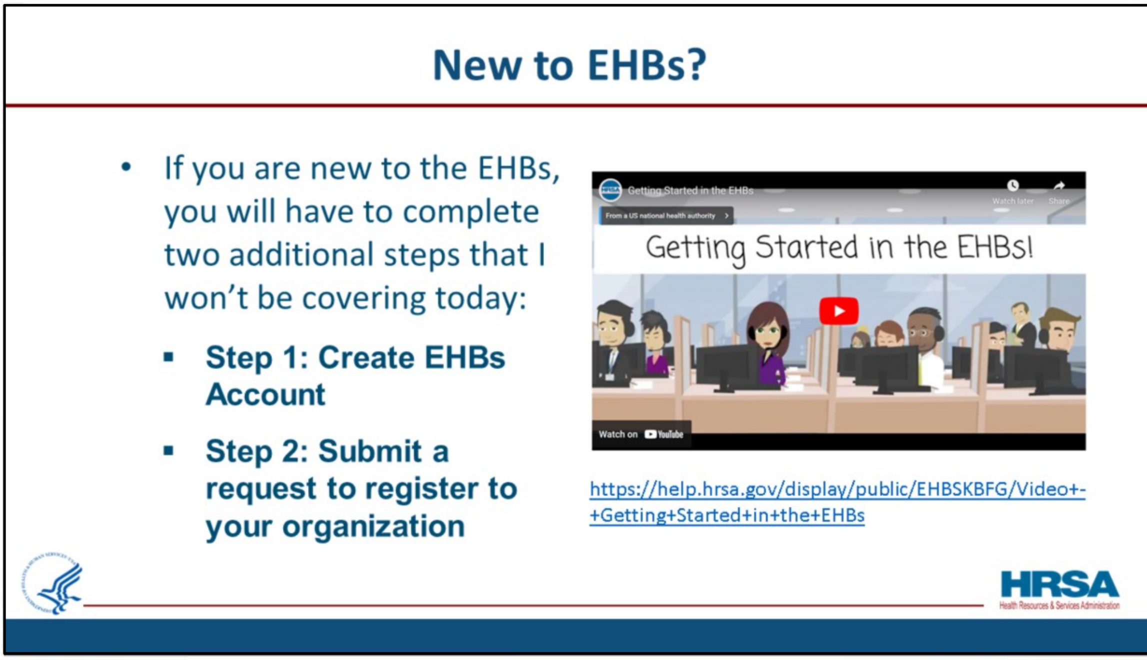
After typing in your password, select Sign in.

EHBs LOGIN PAGE

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



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

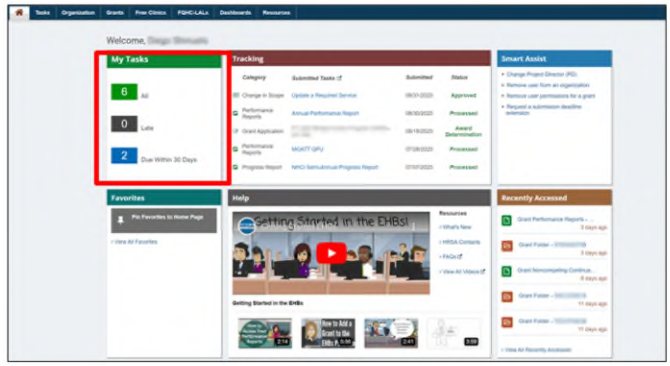


If you are new to the EHBs, you'll have to create an EHBs account and also submit a request to register to your organization. I won't be covering these steps today but don't worry. The video **Getting Started in the EHBs** is less than 5 minutes and will provide step by step guidance on completing these 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.

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



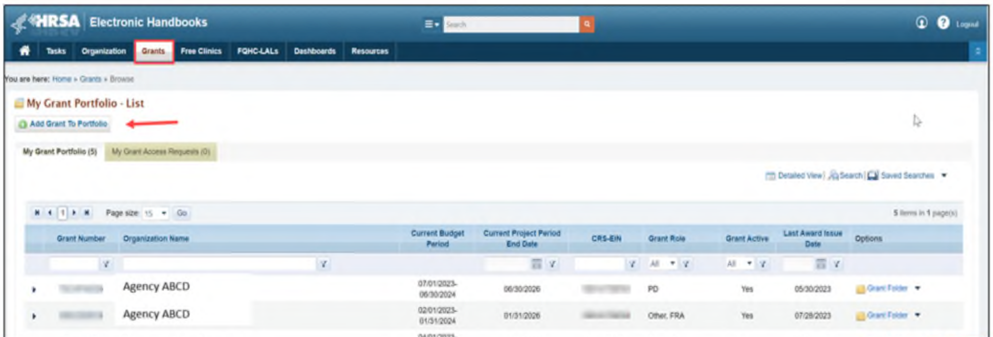
This is a screen shot of the EHBs landing page, or home page, the screen you see when you first log in each time.
After creating your EHB account and adding your organization to your portfolio you'll need to Add your Grant to your Portfolio, which we will discuss next.

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.

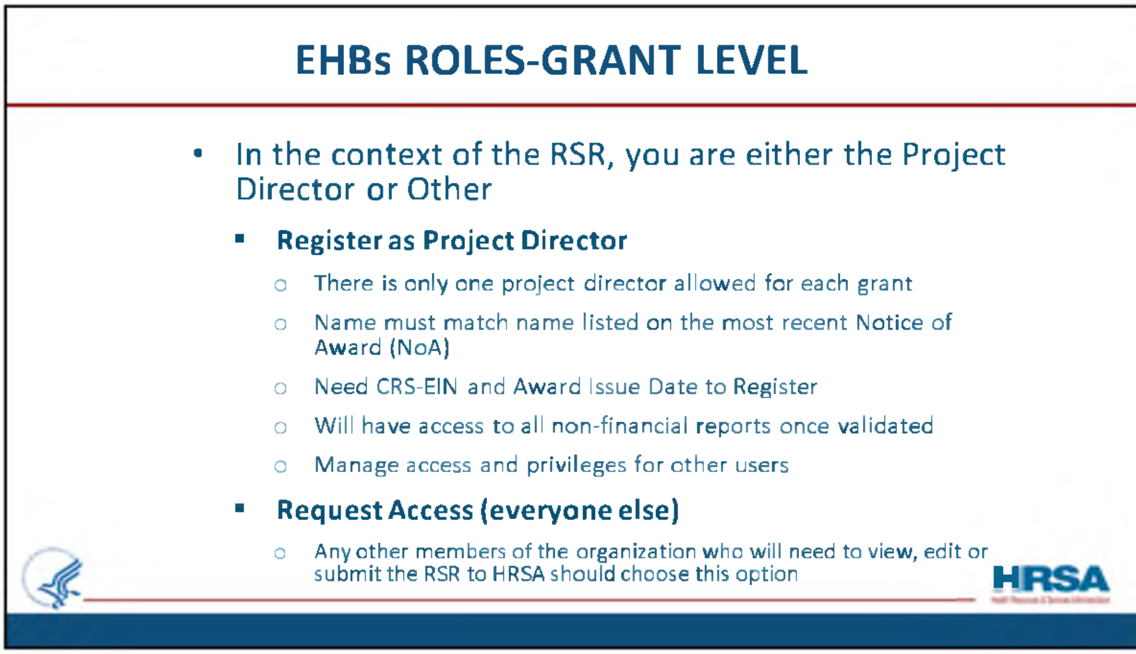
GRANTS TAB

- 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.



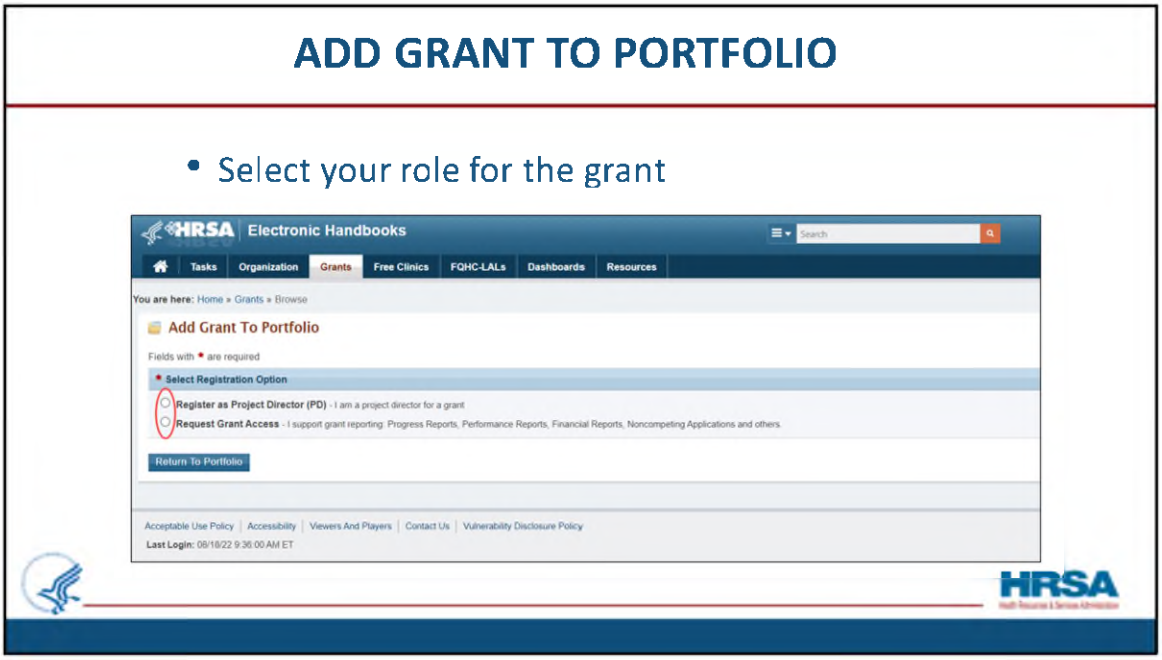
Before we look at how to "Add a Grant to Portfolio", let's look at the EHBs' roles at the Grant level.
In the context of the RSR, you are either the Project Director or Other Employee.

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

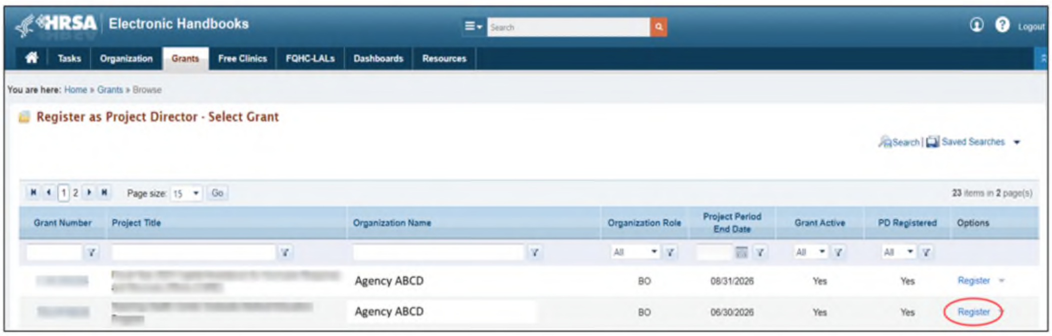


Now, here is the Add Grant to Portfolio screen, the page that results when you click the “Add Grant to Portfolio” button we looked at two slides ago.

Here, you will select your role for the grant:

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

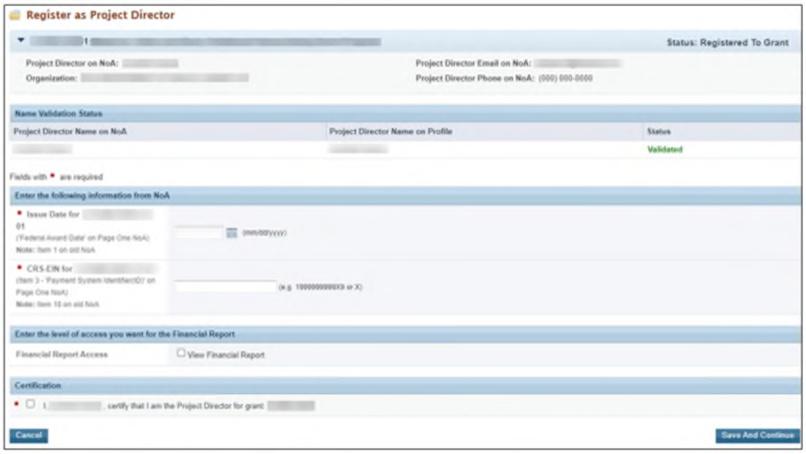
ADD GRANT TO PORTFOLIO (Cont.)



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.)



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

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

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

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

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

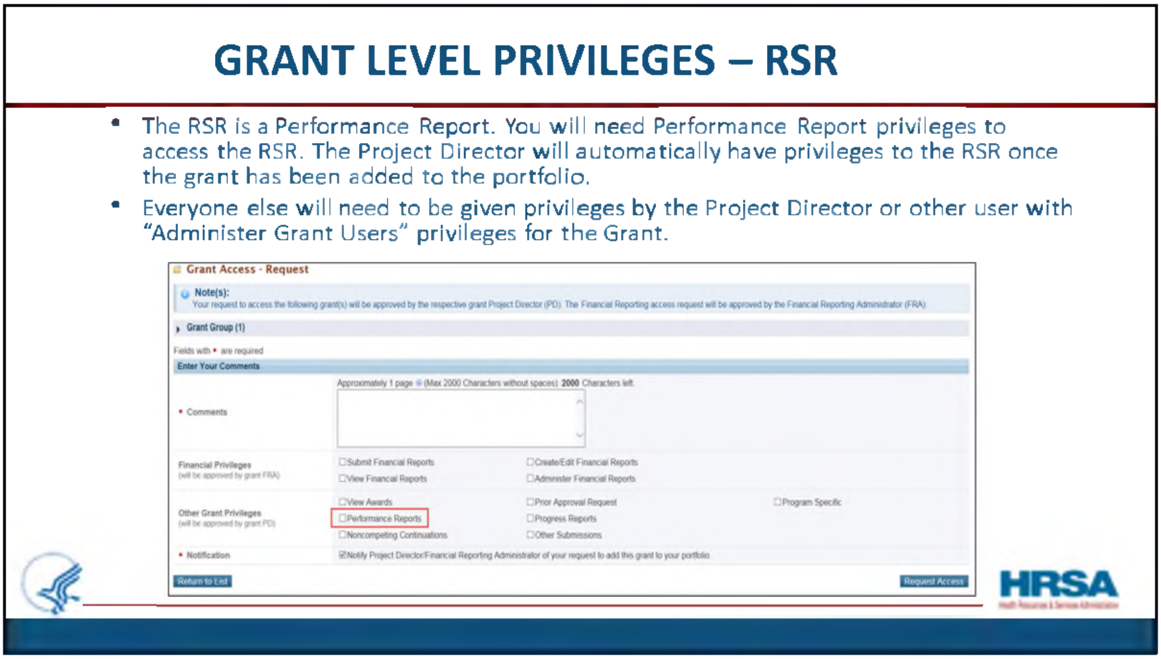
You will then see a Success banner stating that you have successfully added the grant to your portfolio.

TASKS ADDED TO HOME PAGE

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

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

GRANT LEVEL PRIVILEGES - RSR



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					☐
Grant Users				☐	
Awards	☐				
Requests					
Prior Approval Request	☐	☐	☐		
Submissions					
Financial Reports	☐	☐	☐	☐	
Performance Reports	☐	☐	☐		
Progress Reports	☐	☐	☐		
Noncompeting Continuations Reports	☐	☐	☐		
Other Submissions	☐	☐	☐		

Cancel Approve

HRSA

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

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

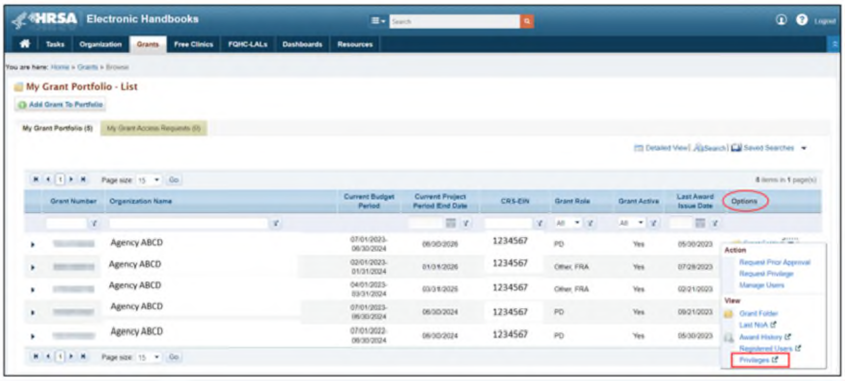
You can learn how to change your project director by going to the link displayed.

The project director is listed on the Notice of Award. Any change to the project director needs to be noted on that Notice of Award.
The organization may submit a prior approval request in the EHBs to make the change.

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

VERIFY YOUR PRIVILEGES

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

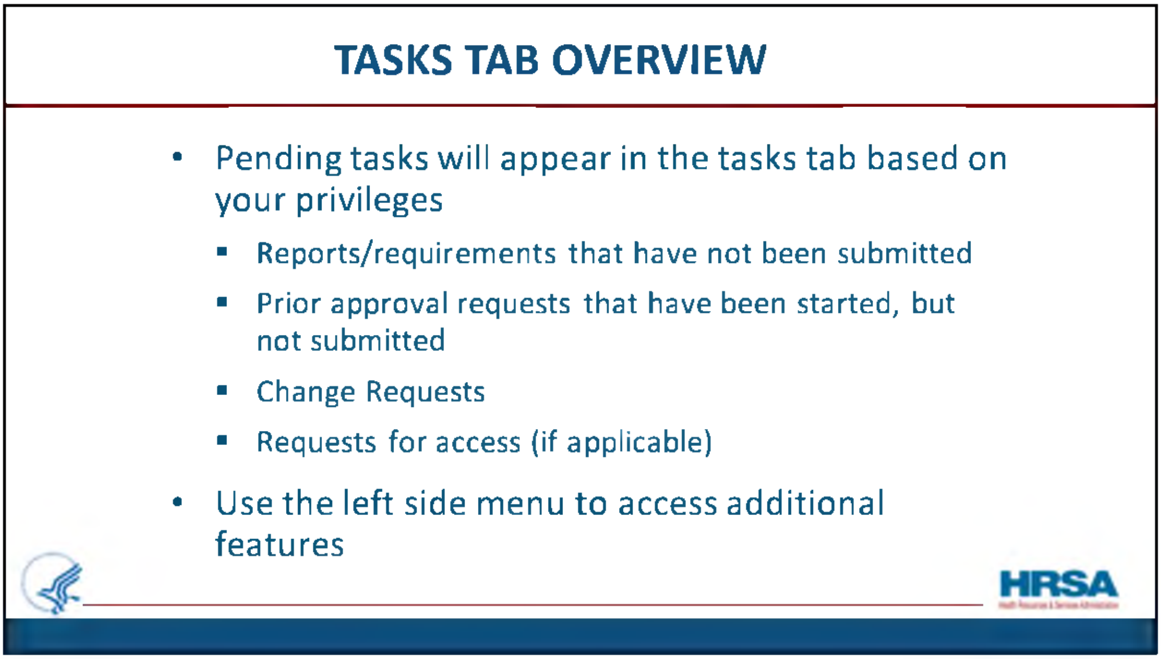


To verify that you have the privileges to access the RSR, check to see if you have privileges for performance reports for the grant.

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

On the right side of the screen, you'll see both the 'Options column as well as the "Privileges" option highlighted in red.

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



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.

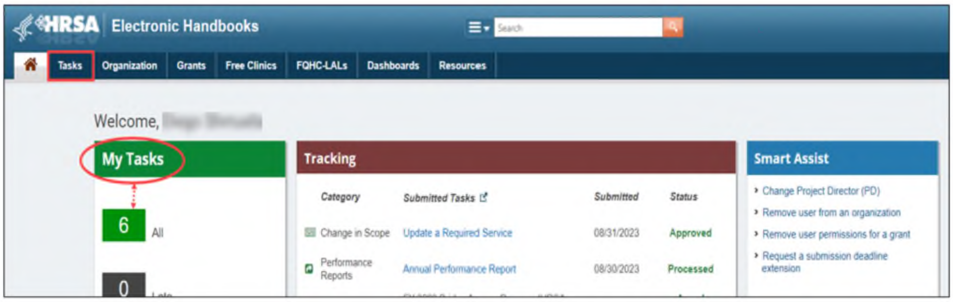
Pending tasks include:

- 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

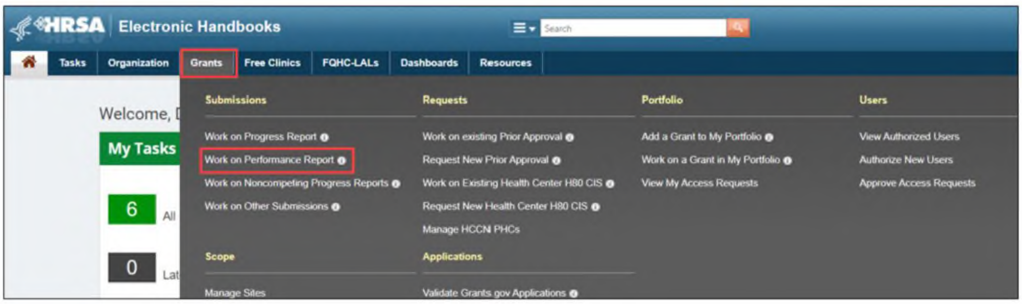


Accessing your Tasks can be done either at the top of the menu bar, or under the My Tasks section.

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



HRSA

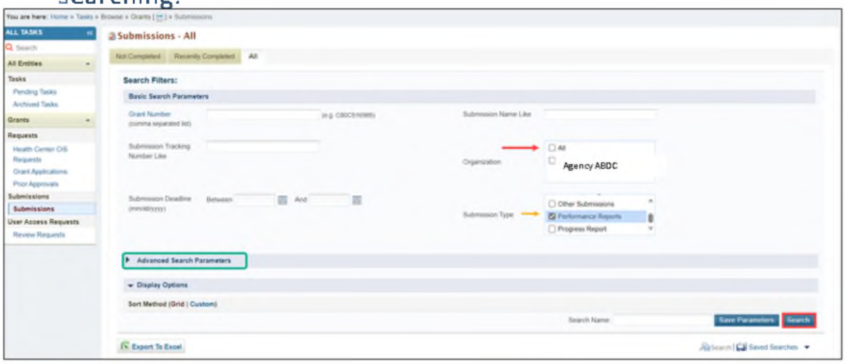
Although Reports can be had through the Tasks Tab, they can also be viewed through the Grants Tab.

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.



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 <u>UN</u>check the “All” box in the Organization area, shown here next to the red arrow.

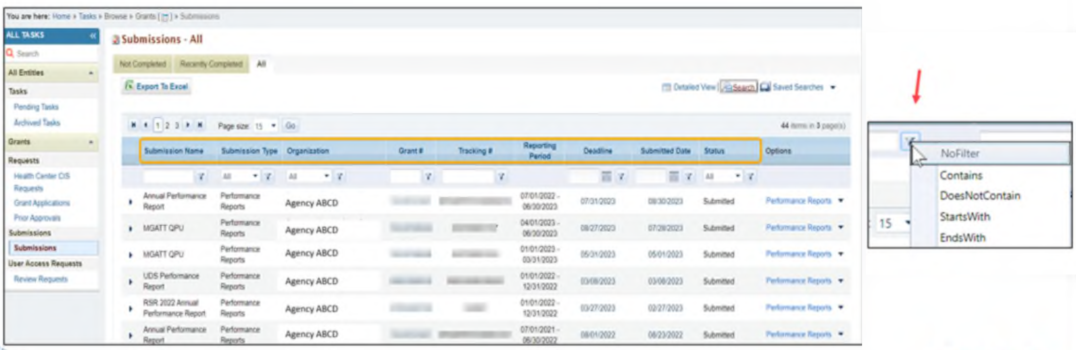
Doing this, and checking the Performance Reports box, will yield quicker and more efficient results.

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.

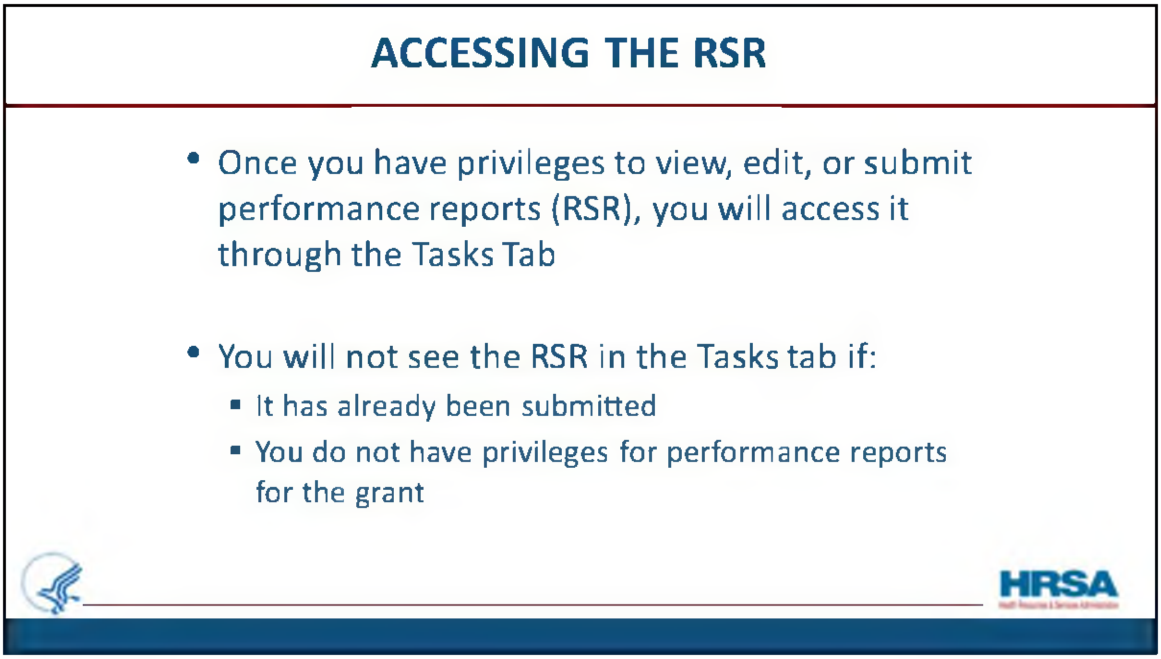


HRSA

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.



Now let’s talk about accessing the RSR.

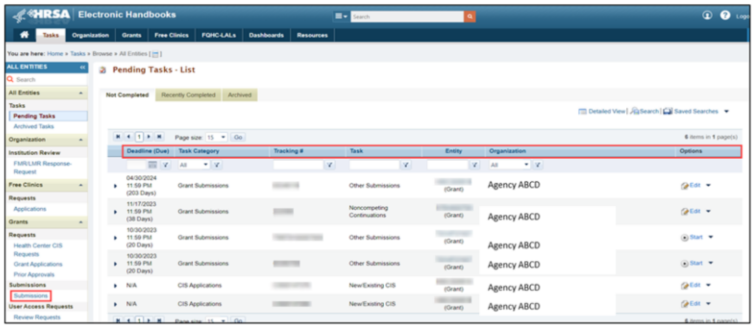
Once you have privileges to view, edit, or submit performance reports, like the RSR, you will normally access it *through* the Tasks Tab.

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.



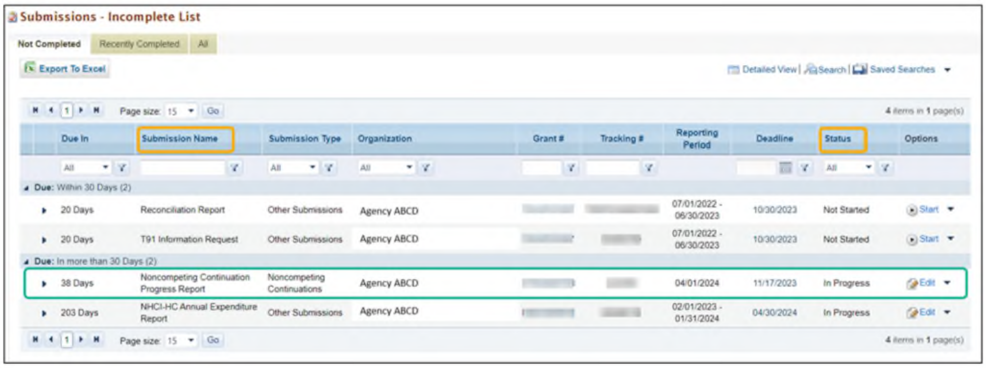
The Pending Tasks section of the Tasks Tab is where you will find the RSR Reports. If you have a long list of submissions required, you may use the search and filter options at the top of the page, shown here outlined in red, for easy navigation.

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

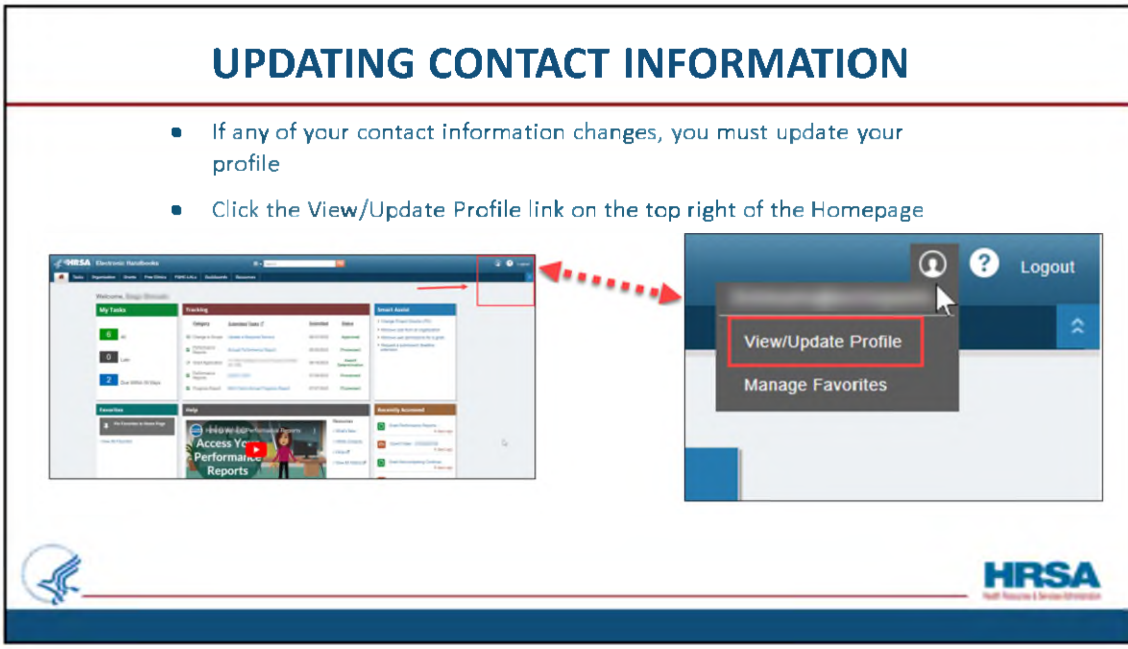
- Navigating to the Submissions section provides additional features like Submission Name.



HRSA

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.



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.

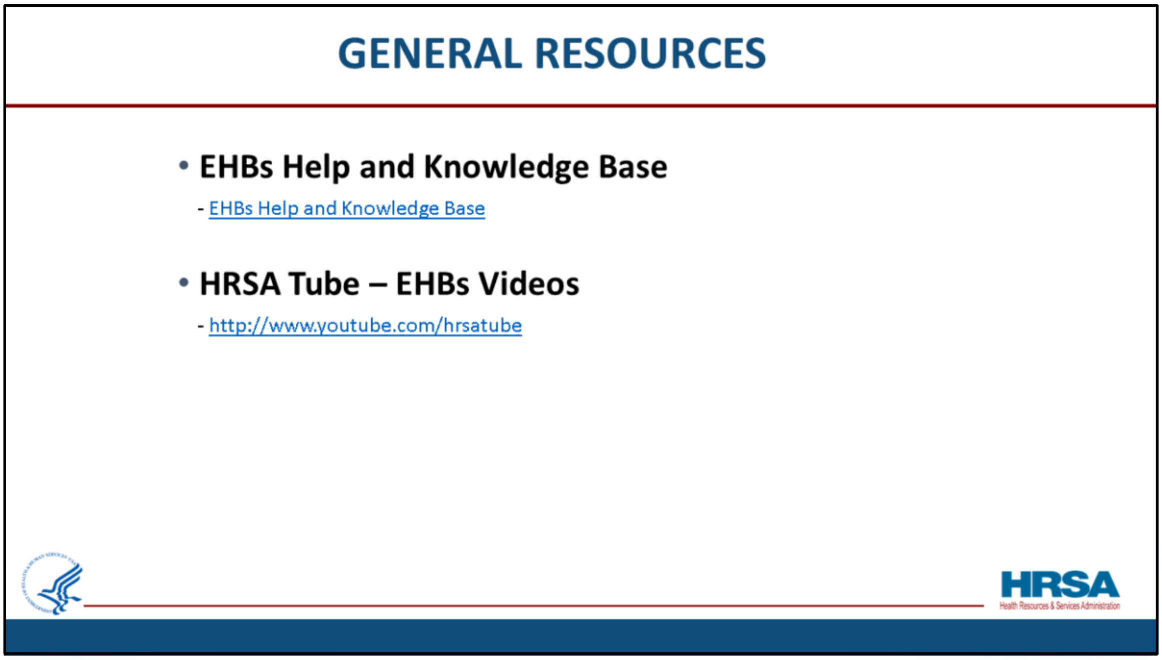
After hovering on your Username icon in the top right corner of the page, click the "View/Update Profile" link as shown outlined in red, to view or update your information.

VIEW/UPDATE PROFILE PAGE

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

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.

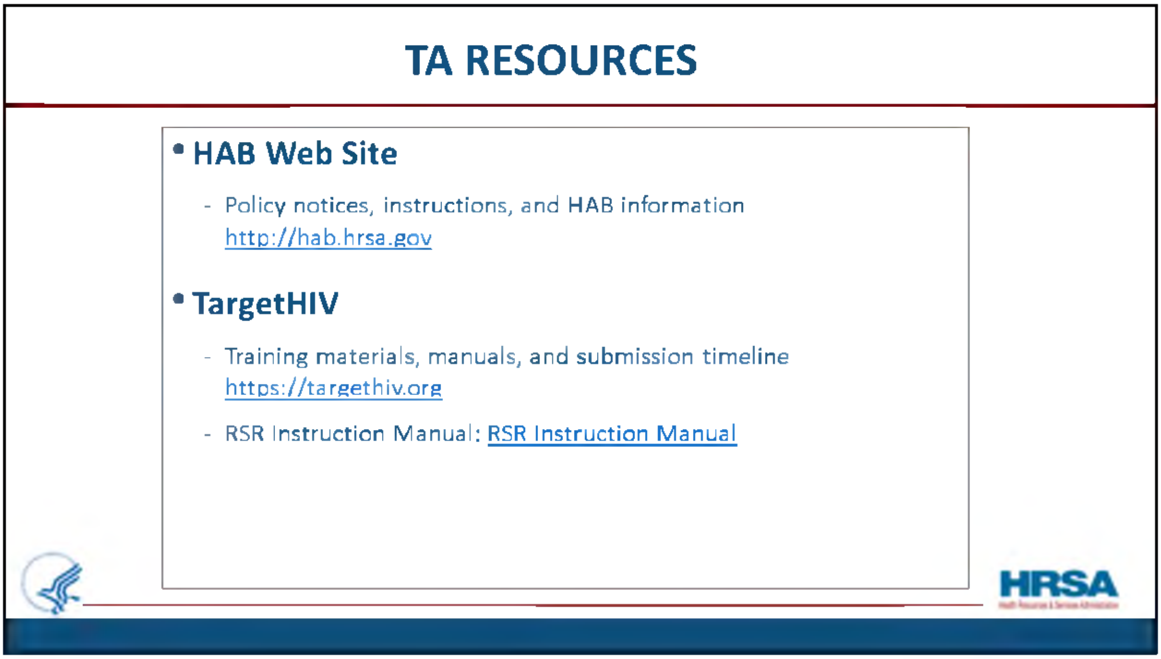
Let’s review some available resources.



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.

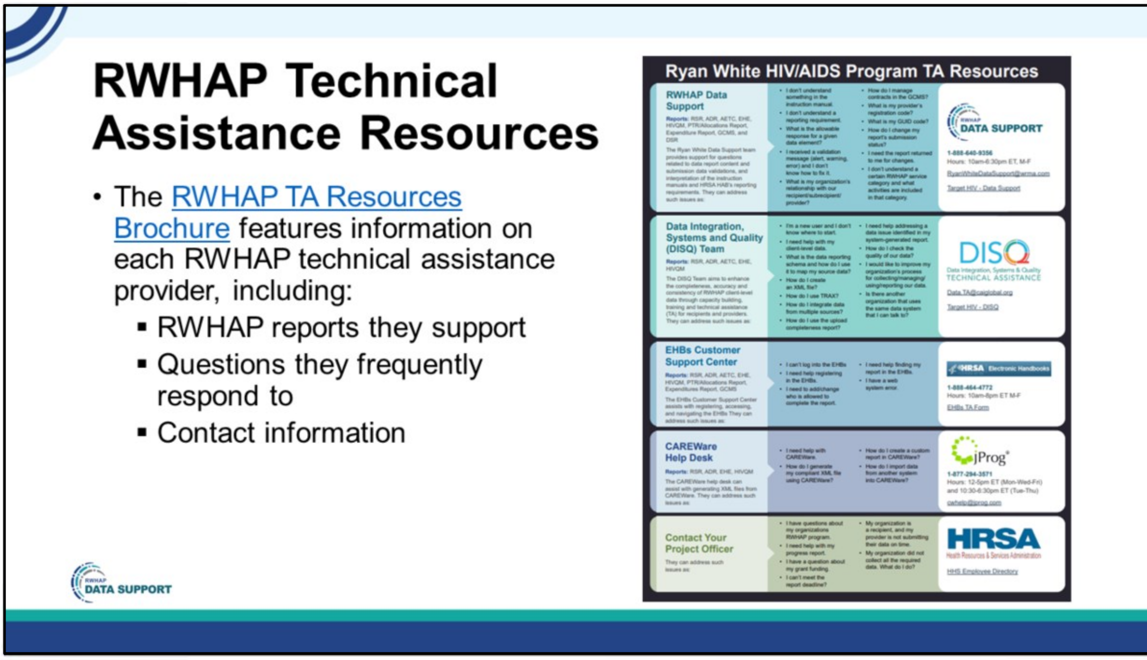
We also have a wealth of videos to help you navigate the EHBs available at youtube.com/hrsatube.



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.

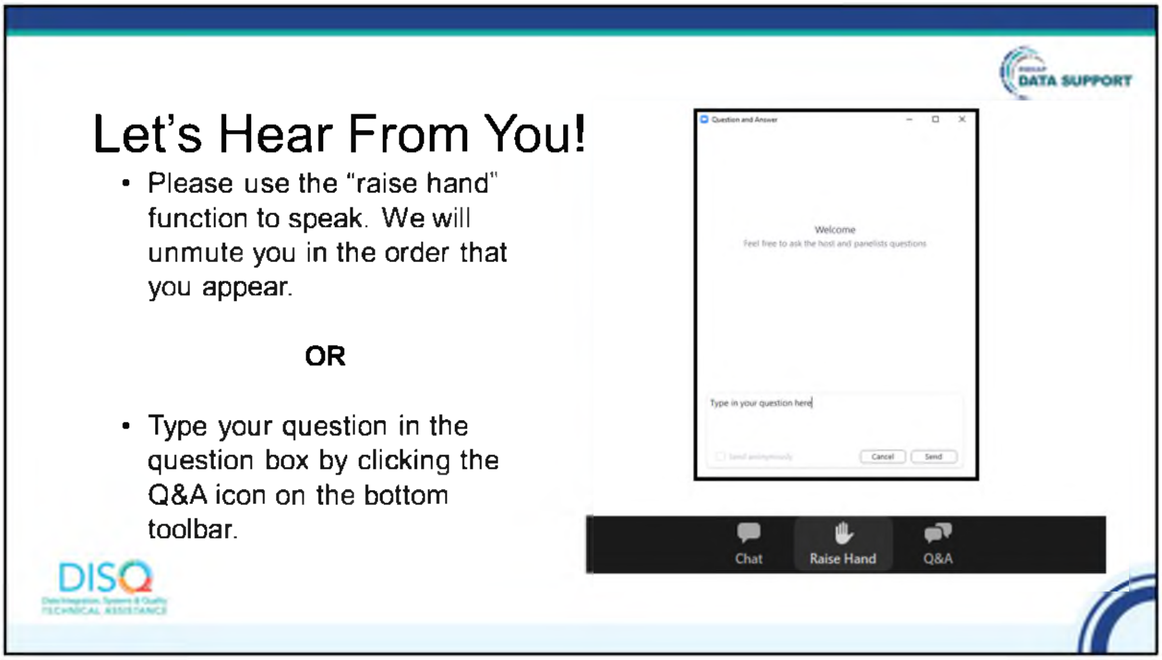
On the TargetHIV web site you can find the submission timeline, the listserv, past webinars, the 2023 RSR Instruction manual, and a wealth of other materials related to the RSR.



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!

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.



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.