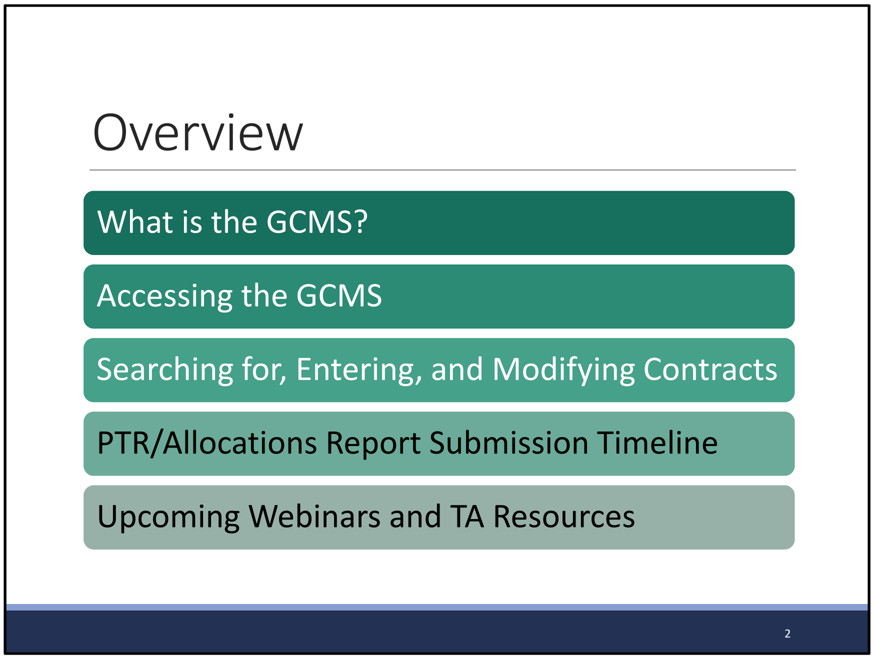
Completing the Grantee Contract Management System (GCMS)

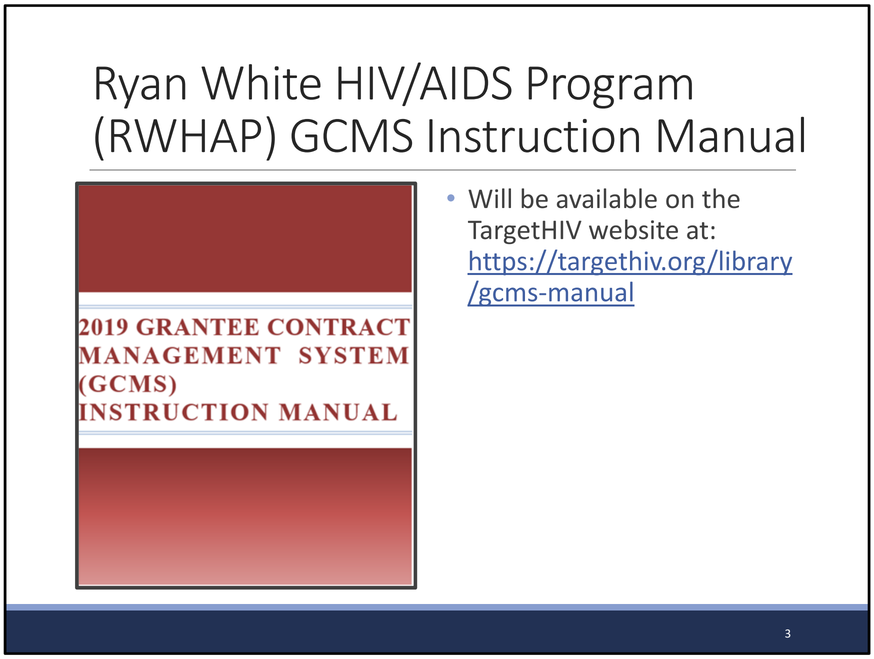
RYAN WHITE HIV/AIDS PROGRAM

HRSA HIV/AIDS BUREAU

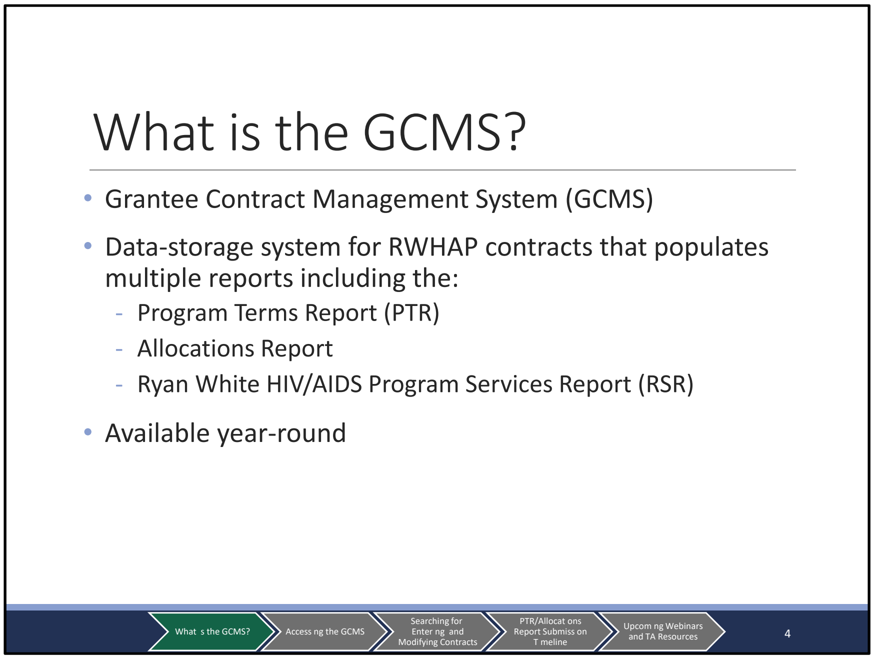
JULY 17, 2019



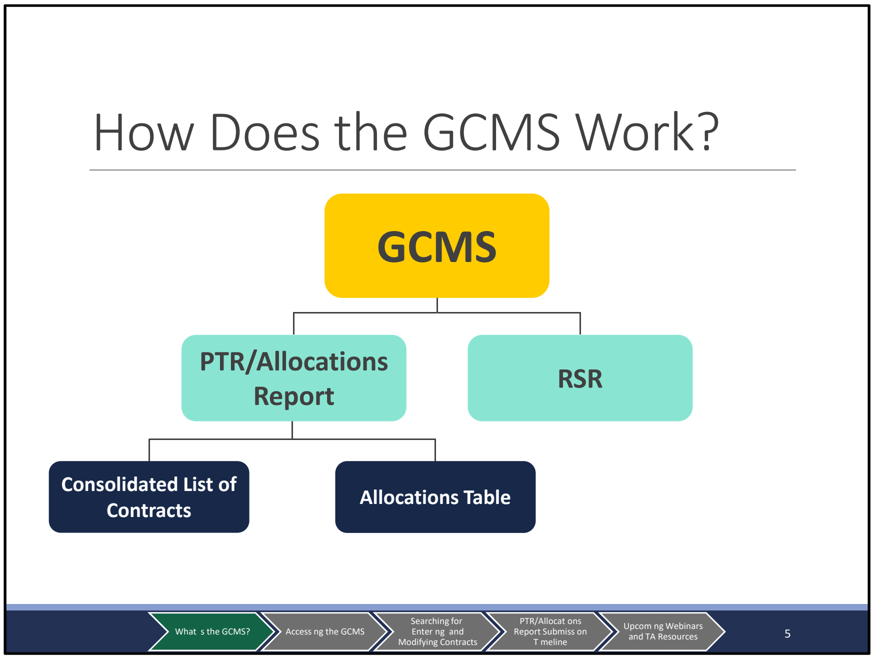
Thanks Rachel. Today we'll be going over how to complete the Grantee Contract Management System, or GCMS. We'll start off by discussing what exactly is the GCMS. Next we'll take a look at how to access the GCMS followed by searching for, entering, and modifying contracts. This section will include updates made to the web system to align with the upcoming change to eligible services reporting. And finally, we'll close out the presentation with a look at the PTR and Allocations Report submission timelines as well as the upcoming webinars and additional TA resources available to assist you.



Before we jump in to the presentation I want to remind everyone of the 2019 GCMS Instruction Manual, which will be available soon on the TargetHIV website at the link shown on this slide. This manual is an incredibly valuable resource when you're working on the GCMS and will contain the instructions presented here today. I definitely recommend checking it out.



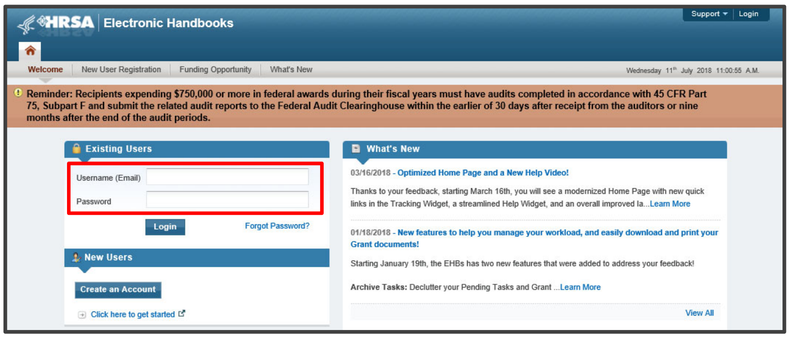
So let's start off with some basic information. As shown previously, GCMS stands for the Grantee Contract Management System. The GCMS is a data-storage system where Ryan White program recipients enter in contract information for their grant funds including service categories and funding amounts. This system helps to save time and decrease reporting burden as the contract details are used to populate multiple reports, including the Program Terms Report (or PTR), the Allocations Report, and the Ryan White Services Report (or RSR). Additionally, the GCMS is available year-round for review and revision.



So, how does this work? Let's say we're a Ryan White program grant recipient and we fund Provider 1 and Provider 2 for a number of services. We take this information and enter it into the GCMS. When we go to start our PTR or Allocations Report, our report will automatically ping the GCMS, grab the contract information we entered, and use it to populate both our consolidated list of contracts and Allocations table. The same contract information will also be pulled when we go to complete our RSR saving valuable time in the submission process. Now that we've got the basics down let's move on to how you access the GCMS.

Log in to the EHBs

- Log in to the Electronic Handbooks (EHBs) at: https://grants.hrsa.gov/2010/WebEPSExternal/Interface/Common/AccessControl/Login.aspx

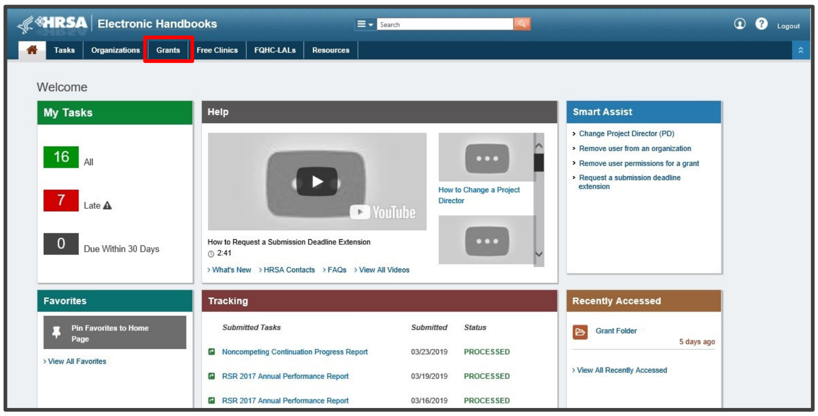


What s the GCMS? | Access ng the GCMS | Searching for Enter ng and Modifying Contracts | PTR/Allocat ons Report Submiss on T meline | Upcom ng Webinars and TA Resources

6

The GCMS is accessed through the HRSA Electronic Handbooks (or EHBs) available at the link on this slide. This link will bring you to the EHBs login page pictured here. Log in to the EHBs by entering your user name and password in the corresponding fields.

EHBs Home Page

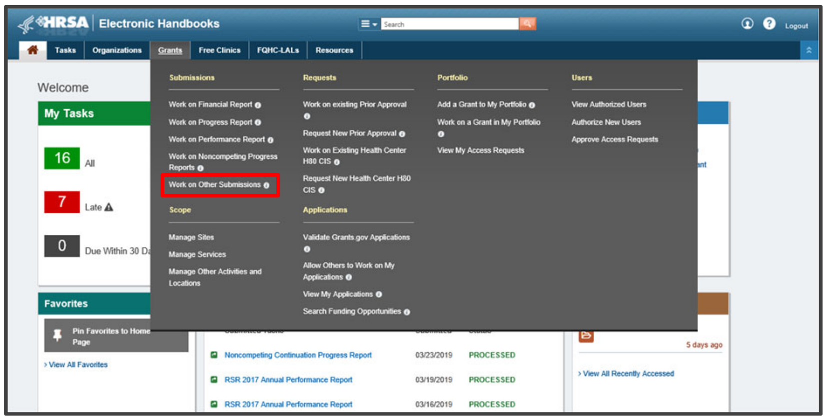


What s the GCMS? | Access ng the GCMS | Searching for Enter ng and Modifying Contracts | PTR/Allocat ons Report Submiss on T meline | Upcom ng Webinars and TA Resources

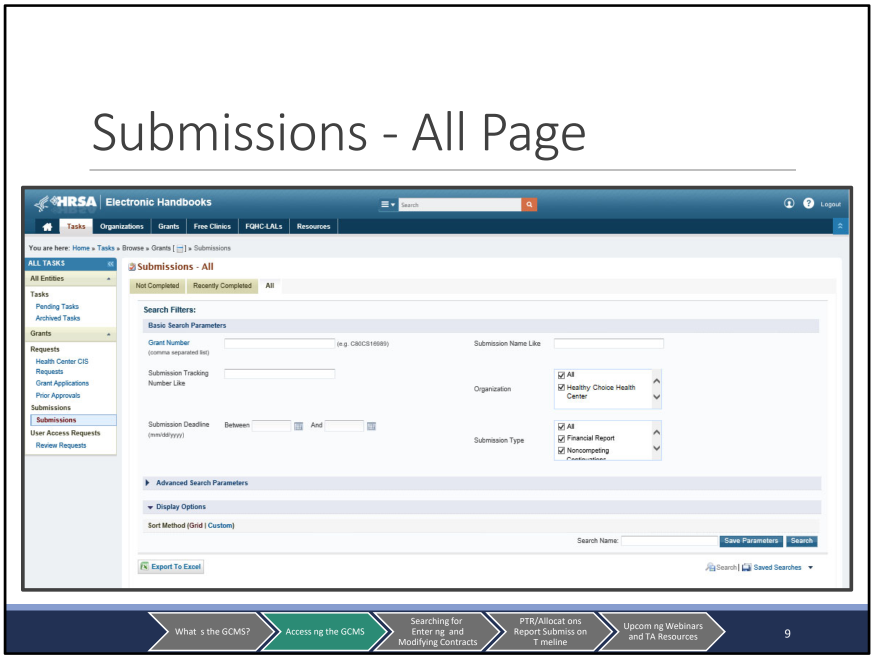
7

Logging in will bring you to the EHBs Home page. You can get to the GCMS by navigating through either the PTR/Allocations Report web application or the RSR web application. But for today's presentation, we'll be focusing on how to access the GCMS through the PTR/Allocations Report. To start, hover over the "Grants" tab at the top of the page.

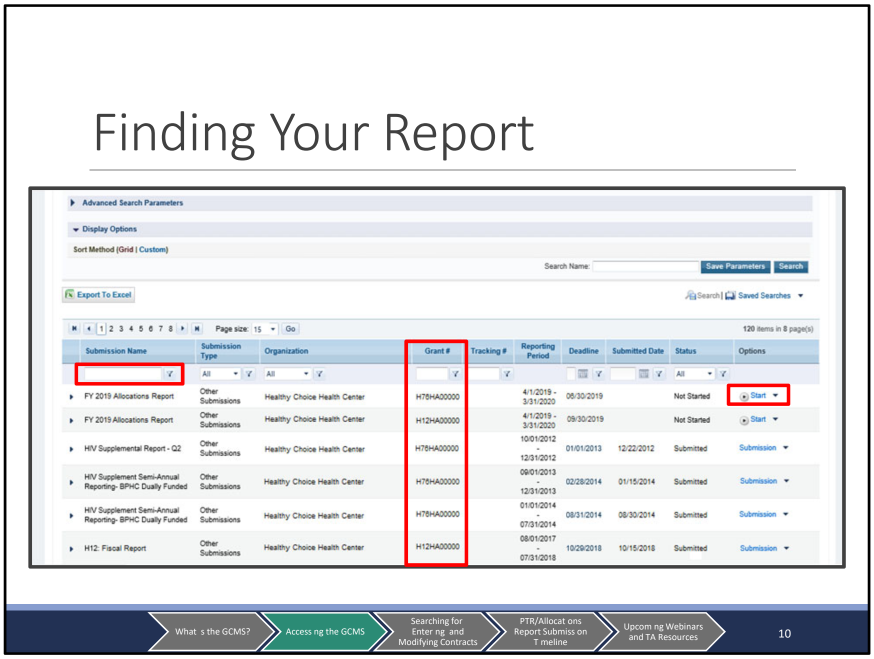
Grants Drop-down Menu



Once you hover over the Grants tab, a drop-down menu will appear. Look for and click on the link labeled “Work on Other Submissions” under the “Submissions” heading.



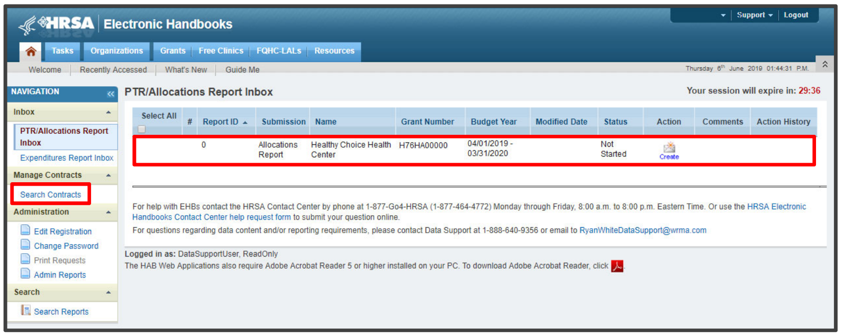
This will bring you to a list of submissions for your agency. At the top of the page you'll see a variety of search fields that you can use to pare down your list of submissions. We'll scroll down past those to get to the full list.



Scrolling down you'll find a full list of submissions for your agency. You want to look for your agency's most recent PTR/Allocations Report deliverable. To make searching easier, you may want to utilize the Filter tool located underneath the "Submission Name" heading. Simply type in all or a portion of the title of the report you're searching for to pare down the submissions list.

As a reminder, you must access the GCMS for each grant your agency receives individually. As an example the example organization in the screenshot on this slide receives both a Part C and a Part D grant. This organization must go through its Part C Allocations Report to enter its Part C contracts and its Part D Allocations Report to enter its Part D contracts. If you have multiple grants, you can identify which report you are entering by looking at the grant number column in the center of the table. For our example, we'll just focus on the first report listed. Once you have found your PTR or Allocations Report, select the "Start" or "Edit" link listed under the far-right column titled "Options." If you haven't accessed the report previously this link will read "Start." But after you have started the report the link will read "Edit."

PTR/Allocations Report Inbox



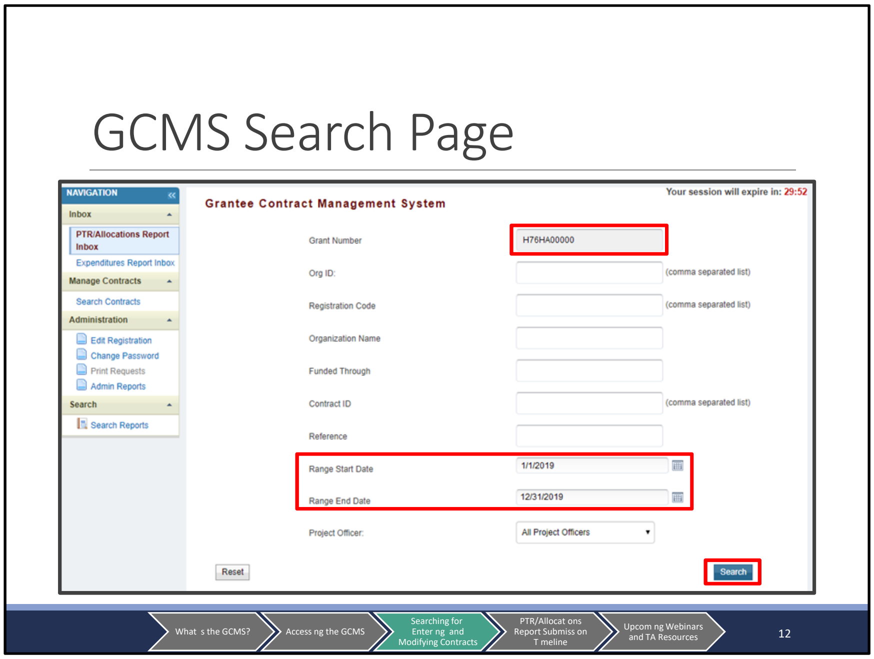
What s the GCMS? | Access ng the GCMS | Searching for Enter ng and Modifying Contracts | PTR/Allocat ons Report Submiss on T meline | Upcom ng Webinars and TA Resources

11

Clicking on start or edit will open a new window with the PTR/Allocations Report inbox. Here you'll see your agency's report in the center of the page in the inbox. Now, today we'll just be going over how to complete the GCMS and not the PTR or the Allocations Report. If you need further instructions for completing either report, I recommend you check out the webinars on those reports. Information for both of those will be displayed at the end of the presentation.

Moving on, it is strongly recommended that you complete the GCMS and fill out all contracts before opening your report. This will save you time later on in the submission process as any changes made to your contracts after opening your report must be individually synchronized.

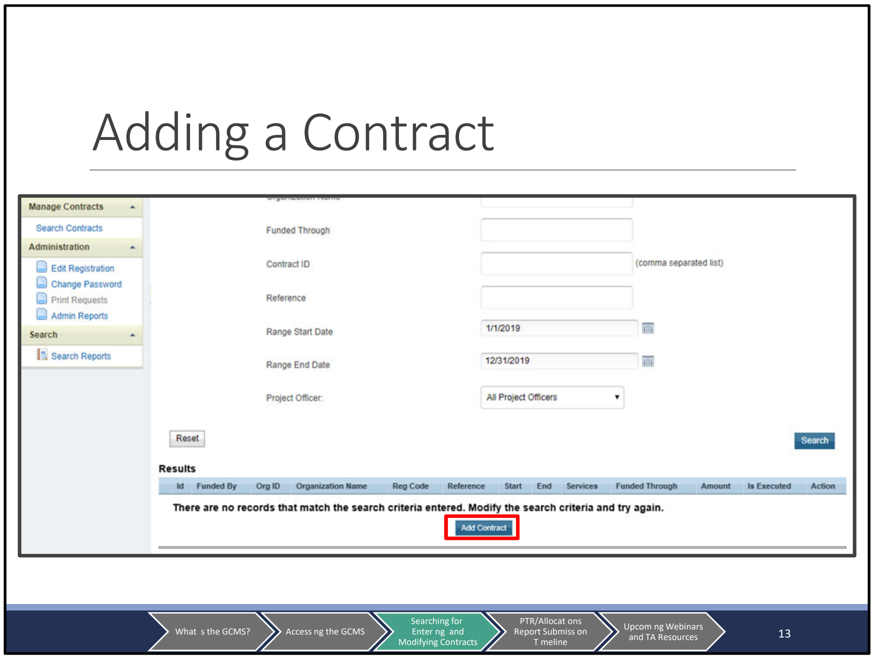
Let's get back to the GCMS. To access it, click on "Search Contracts" in the left-hand navigation panel.



Clicking on “Search Contracts” will take you straight to the GCMS, showing the page displayed on this slide. Here we can see a list of different search fields that we can use to locate our agency’s contracts, including the organization name, registration code, and contract dates. Your grant number will be auto populated in the grant number search field. For our example, we’ll also search using a date range for the 2019 calendar year. By using these search parameters, our search results will only include contracts that were funded at any time during 2019 with this grant. However, you can limit or expand your search by including more or less information in the search fields.

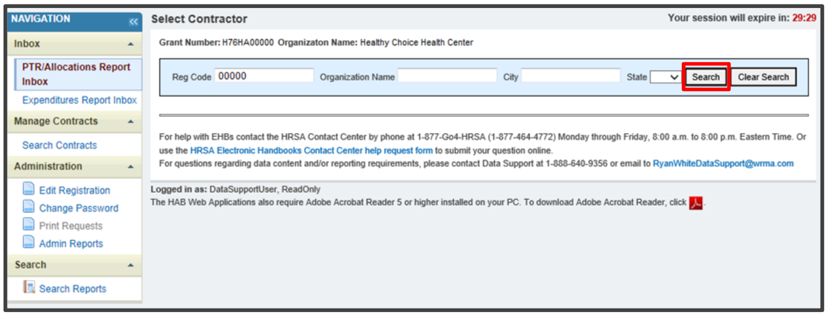
In order to add your agency’s contracts into the system you must perform a search first. It is important to first search for a contract to ensure it has not already been added. Your agency should establish guidelines on who will be responsible for accessing the GCMS to make modifications or enter any new contracts your agency establishes.

After you’ve filled in the criteria you want to search by, click the “Search” button on the bottom right corner of the page.



Once you have searched in the GCMS, you will see all contracts for your agency that match the search criteria you entered. If there are no contracts that meet your search criteria, as is the case in our example, a message like the one on this slide will appear. Once you have performed a search, the “Add Contract” button will appear on the bottom of the page. To add a new contract, start by clicking this button.

Provider Search Page

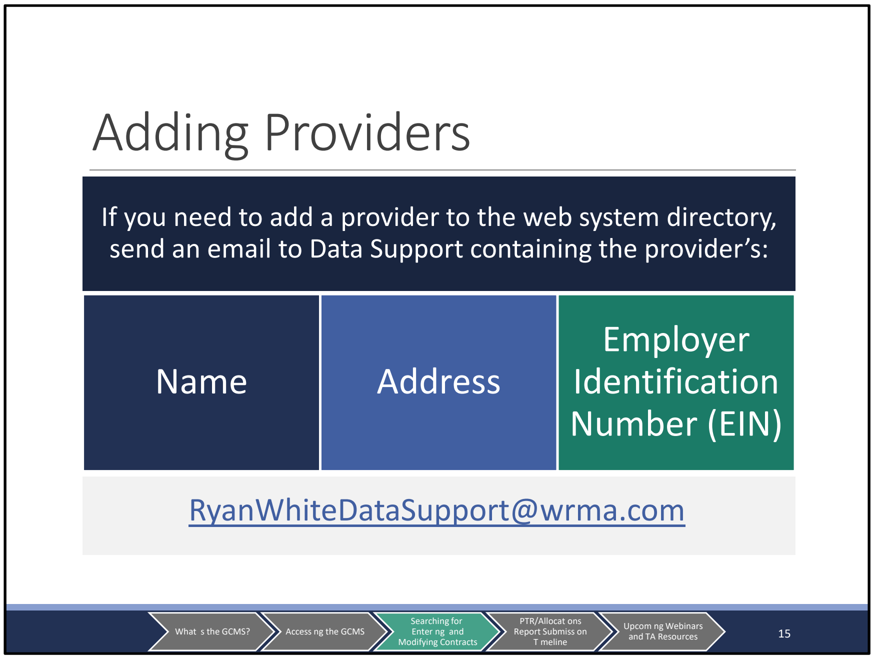


What s the GCMS? | Access ng the GCMS | Searching for Enter ng and Modifying Contracts | PTR/Allocat ons Report Submiss on T meline | Upcom ng Webinars and TA Resources | 14

Clicking on “Add Contract” will bring you to the provider search function. In order to add a contract, you must first select which organization the contract is with. On this page, you’ll see a few search fields that will help you to select your provider including registration code and organization name. You can find your providers’ registration codes by looking at your contract search results or by viewing your own most recent RSR Recipient Report. The registration code is the easiest and most accurate way to search for your providers.

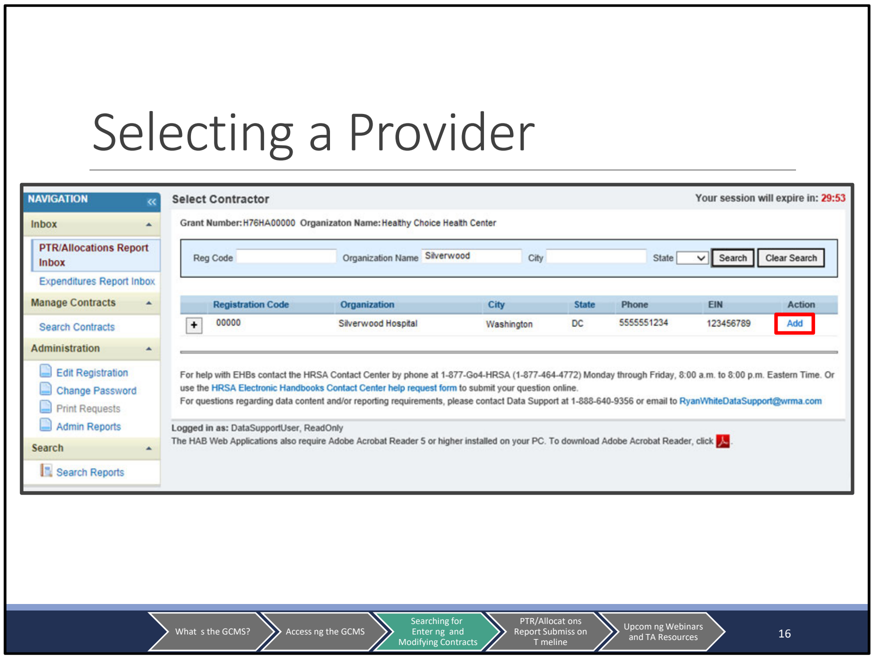
You also may be wondering to yourself at this point, what about the services that I as a recipient provide that I don’t contract with an outside organization for. Well, those services are also entered into a contract in the GCMS. Simply search for your own organization and fill out the contract details using the instructions coming up in the presentation.

For our example, we’ll add a contract with another provider and search using their registration code which we have input into the proper search field. Once you have entered the search criteria you want, click on “Search” to look up the provider.

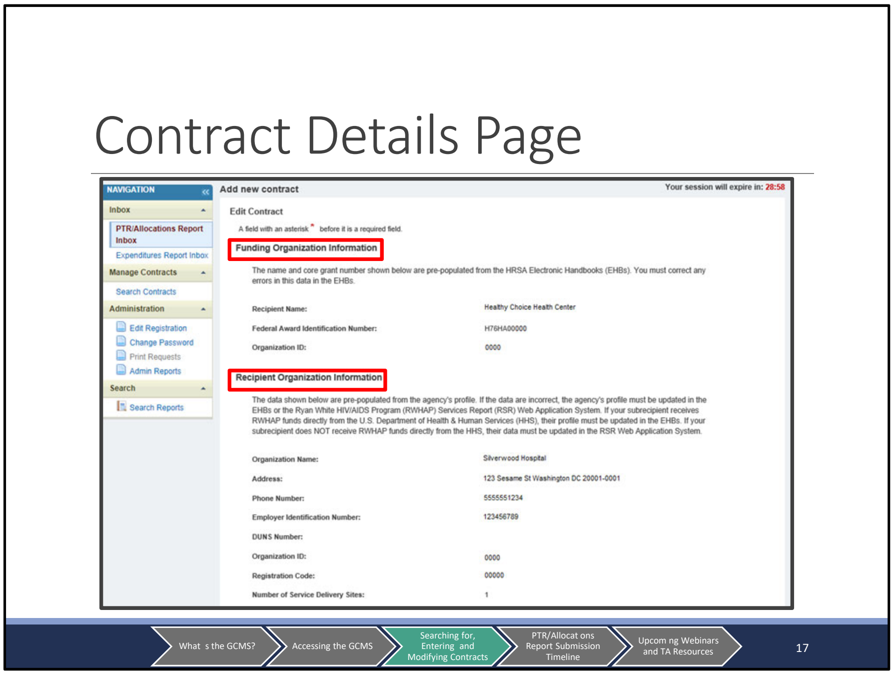


You may also need to add a brand new provider to the web system directory. Start by performing a search as in the previous slide just to make sure that they are not already in the directory. After confirming the provider is not there, send an email to Data Support at the email address listed on this slide and make sure to include the provider name, the address, and the EIN (or tax ID number). This information is needed in order to add the provider to the web system.

Additionally, if you're just struggling to locate a provider with the search function or need help identifying a provider's registration code contact Data Support and we'll be able to help you out. We'll go over contact information for Data Support again at the end of the presentation when we go over the TA resources.

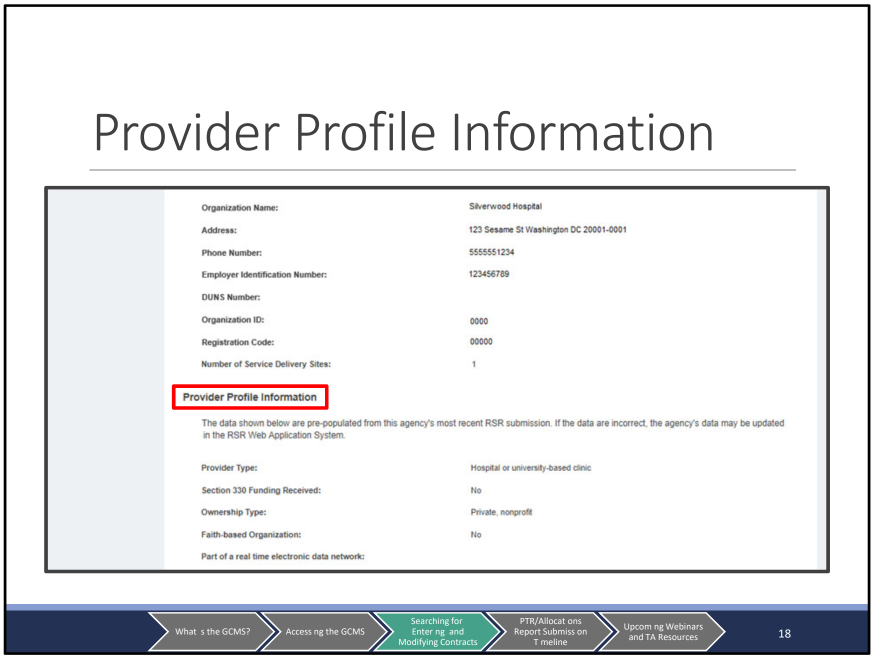


Once you have performed a search, the system will pull up all of the organizations that meet your search criteria. If your search doesn't yield any results, try modifying the search criteria and searching again. Use the information listed in the search result to confirm that it is the organization you are looking for. Once you have found the correct provider, click Add in the far-right Action column.



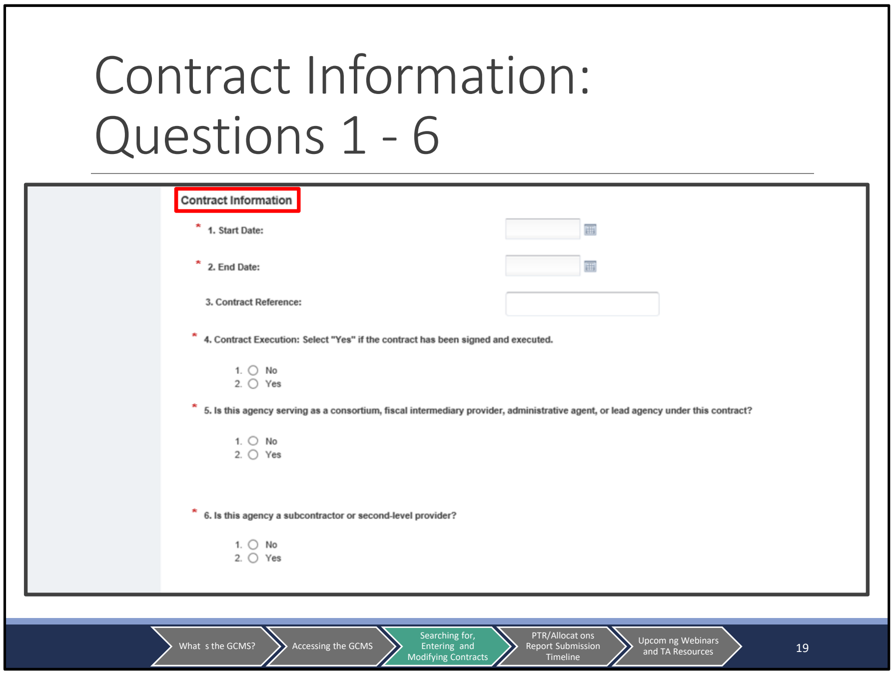
Once you've clicked "Add," a new screen will open showing the contract details page. The first few sections on this screen will contain information prepopulated by the web system, starting with "Funding Organization Information." This section is about your organization, the grant recipient, and includes your recipient name, your grant number, and the organization ID assigned by the web system.

The next section is "Recipient Organization Information." The information here is in reference to the provider that you selected. Included is the provider's organization name, address, phone number, EIN (or tax ID number), the DUNS number (if applicable), the web system assigned organization ID, registration code, and the number of service delivery sites.

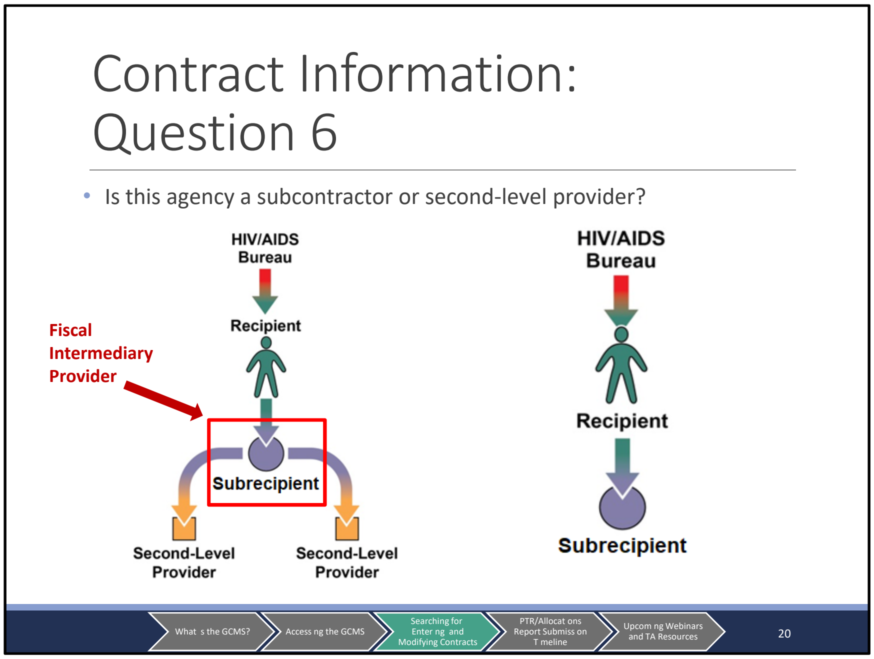


If you scroll down a little farther, you'll come to the last section of pre-populated information which is "Provider Profile Information." This section includes the provider type, whether Section 330 funding is received, the agency ownership type, whether the agency is faith based, and whether or not the agency is part of a real time electronic data network.

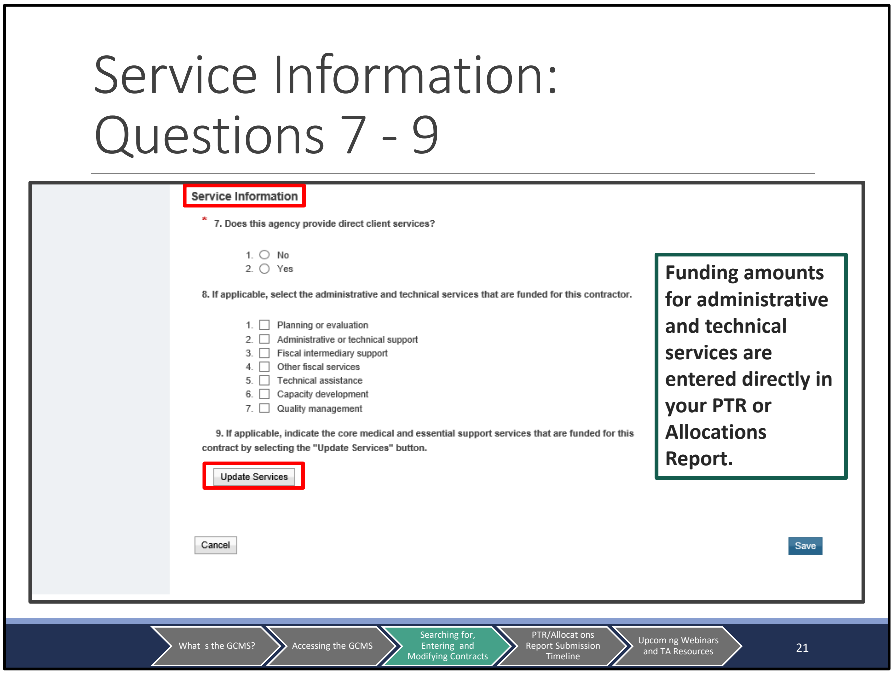
If the provider has completed an RSR Provider Report before, you should find this information prepopulated. If you are adding a new Ryan White provider, this information will populate when the provider completes its RSR Provider Report. If any of the pre-populated information shown is incorrect, the narrative for each of the three sections will direct you to where it can be updated.



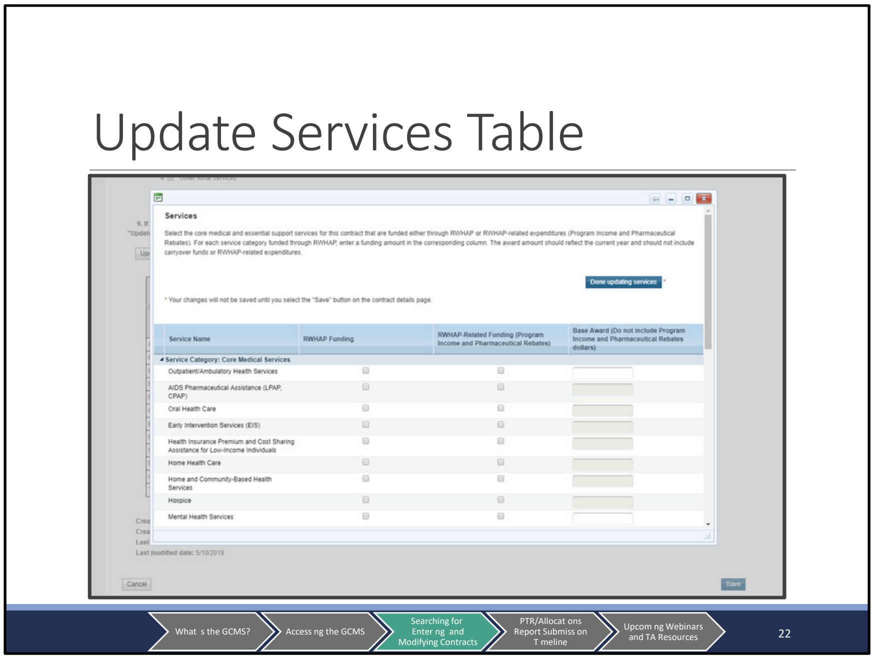
As you continue to scroll down the page, you'll come to the "Contract Information" section, with fields that you can fill out for the provider you are adding. All fields with a red asterisk must be completed, including the contract start and end date; whether the contract has been signed and executed; whether this agency serves as a consortium, fiscal intermediary provider, administrative agent, or lead agency under this contract; and whether this agency is a subcontractor or second-level provider. The optional "Contract Reference" field is a place where you can enter in any additional information to help you distinguish between your different contracts. Now, a couple points to note here: if you are adding a contract with your own agency, you cannot indicate yourself as serving as a fiscal intermediary (which is in Question 5) or as a second-level provider (Question 6).



Additionally, I want to add a little clarification regarding the wording of question 6 since a lot of recipients have indicated issues with this in the past, specifically when it comes to the word subcontractor. The question states, “Is this agency a subcontractor or second-level provider?” If we look at the diagram on the left, we can see an example of this. For the purposes of the GCMS, a subcontractor and a second-level provider are the exact same thing which is an organization that receives their funding through a fiscal intermediary and not directly from the grant recipient. But if your agency as the grant recipient gives funding directly to the provider as in the diagram on the right then that provider is not a second-level provider and you would mark “No” for Question 6.

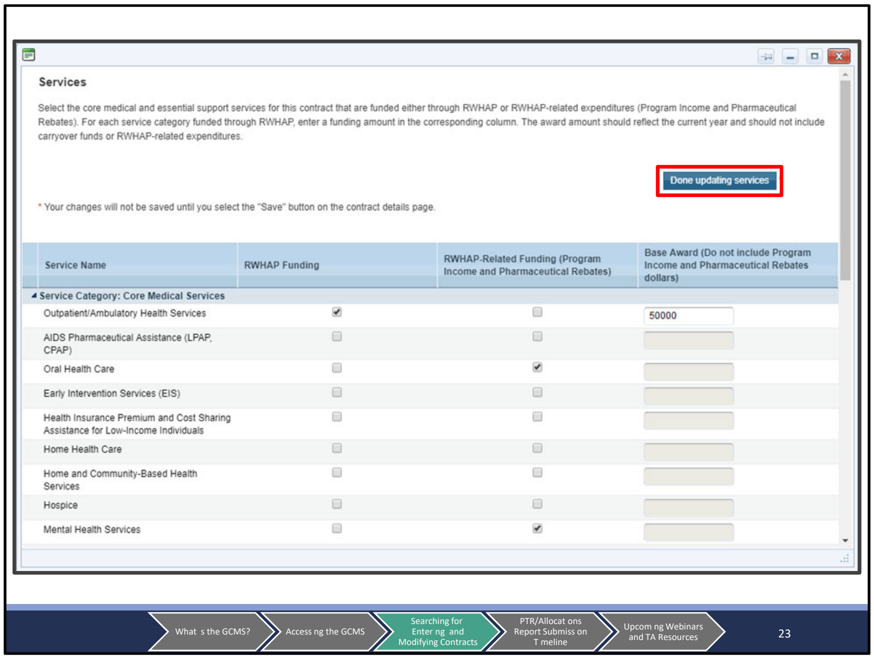


Moving on, once you have completed the “Contract Information” section, you can continue scrolling to the “Service Information” section. In Question 7, indicate if this agency provides direct client services. Questions 8 and 9 are where you will enter additional information regarding the services provided by this agency. In Question 8, check off any administrative or technical services that this provider was funded to provide. Now, as a reminder, funding amounts for these administrative and technical services are entered into your agency’s PTR or Allocations Report and not in contracts in the GCMS. And finally we come to Question 9. This is where you will add the core medical and support services the provider was funded to provide. To begin, you’ll click “Update Services.”



Clicking “Update Services” will open a pop-up window much like the one pictured on this slide. The table will vary based on program part. We’ll go over the differences in the upcoming slides but for our example we’ll proceed through the instructions using this one which is what a Part C or D recipient would see.

You may notice some changes to this table. These changes were made to the system to align with the upcoming eligible services reporting requirement. With these updates, your contracts will now be able to capture information on additional service categories funded through RWHAP-related funding. To progress through our instructions, let’s zoom in on this table a little bit.



There are two new columns on this table to go over. The first is the Ryan White HIV/AIDS Program Funding column. In this column, you'll find a series of checkboxes for each service category. You'll click the checkbox for each service category in this column that is funded by your base award for the specified grant.

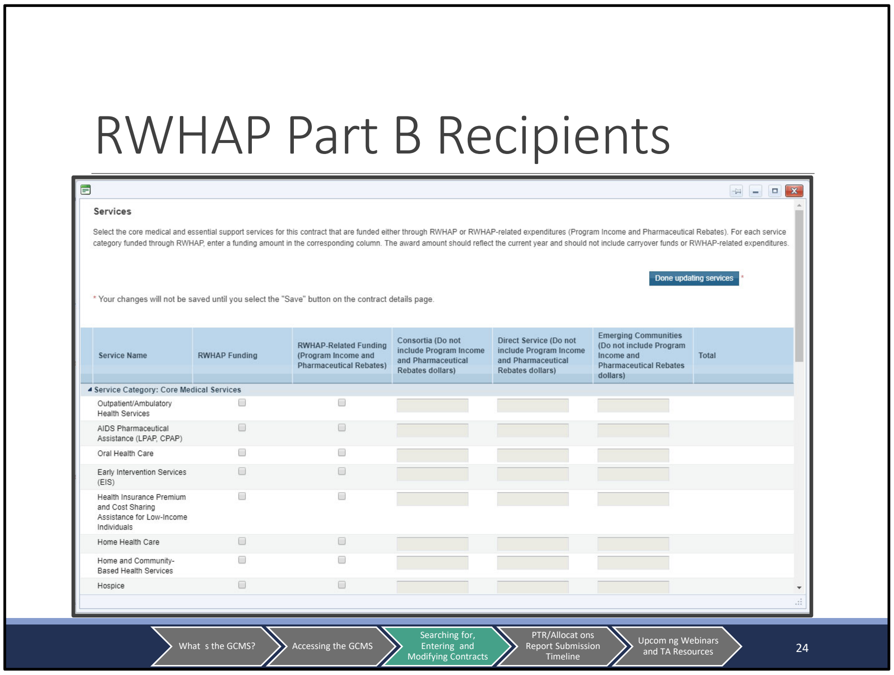
The second new column is the Ryan White-related funding column. This column functions much in the same way as the previous one but in this column, you will only mark the checkboxes for services funded by Ryan White-related funding including program income and pharmaceutical rebates.

The last column on this table is for the actual funding amounts. Parts C and D only have the one base award column for funding amounts which you see here. You'll notice that currently none of the boxes in this column are editable and they are all greyed out. You will only be able to enter funding amounts for the services that you have checked off in the Ryan White funding column. Do not include any funding amounts for Ryan White-related funding such as program income or pharmaceutical rebates in your contracts. And remember to only use whole numbers. Once you have entered in all the service information for your contract, click "Done updating services" to return to the Contract Details page. Let's run through an example to see exactly how this works.

Let's say we give this provider $50,000 for Outpatient/Ambulatory Health Services with our base award and we give them funding from our program income to provide Oral Health Care and Mental Health Services. We'll start by selecting the appropriate checkbox in the Ryan White funding column for Outpatient/Ambulatory Health Services. You'll notice that once we select this checkbox then the funding amount box is no longer greyed out and we can input the $50,000 into the corresponding box in the Base Award column.

Now we also want to add our information regarding the services funded through our program income. We'll select the corresponding checkboxes in the Ryan White-related funding column for Oral Health Care and Mental Health Services. Since we have only marked these services as being funded through Ryan White-related funding, the funding amount boxes in the base award column will continue to be greyed out since you should not enter funding amounts for Ryan White-related funding.

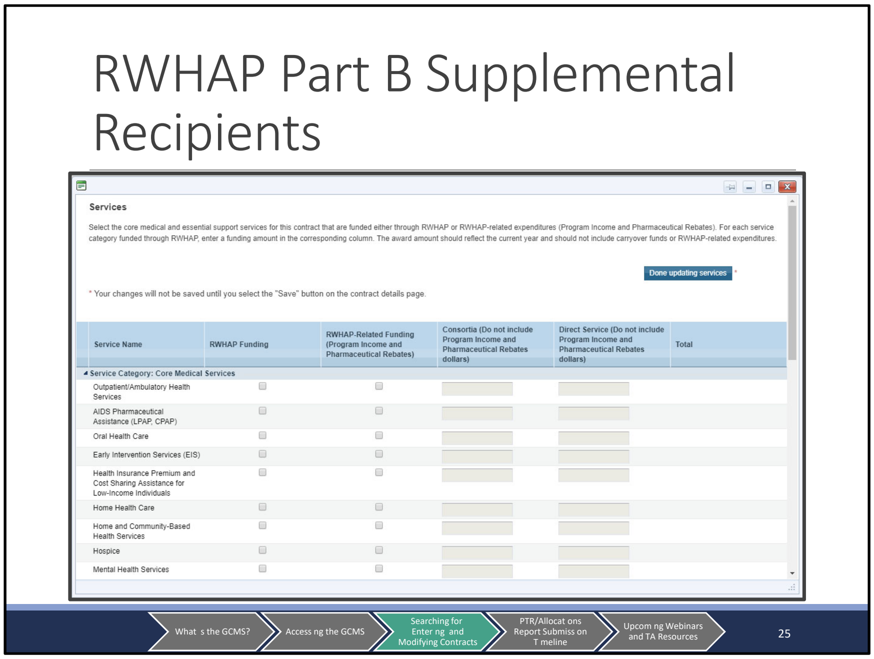
Let's move on and talk about the update services table for the other program parts.



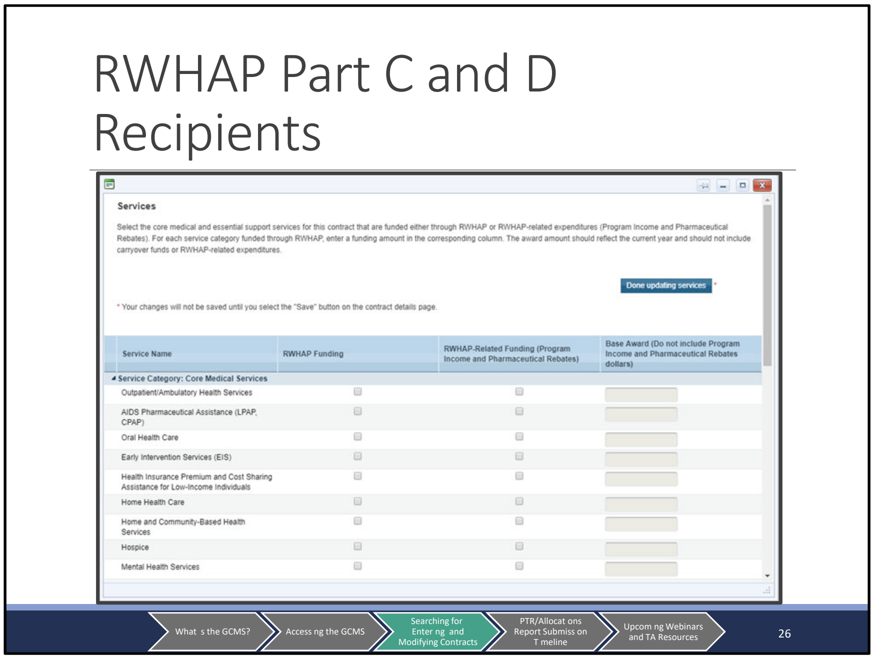
For Part B, instead of the single base award column, you must indicate if the core medical and support services were funded using “Consortia” funds, “Direct Service” funds, or “Emerging Communities” funds. These columns function in the same way as those presented on the previous slide. The Consortia, Direct Service, and Emerging Communities columns start as greyed out and you will be able to enter funding amounts for services that you have checked off in the Ryan White funding column.

There is also an additional Total column in the tables for Parts B and B Supplemental. This column will auto-populate with the summed total funding amount for each service category once you have input values into the appropriate boxes.

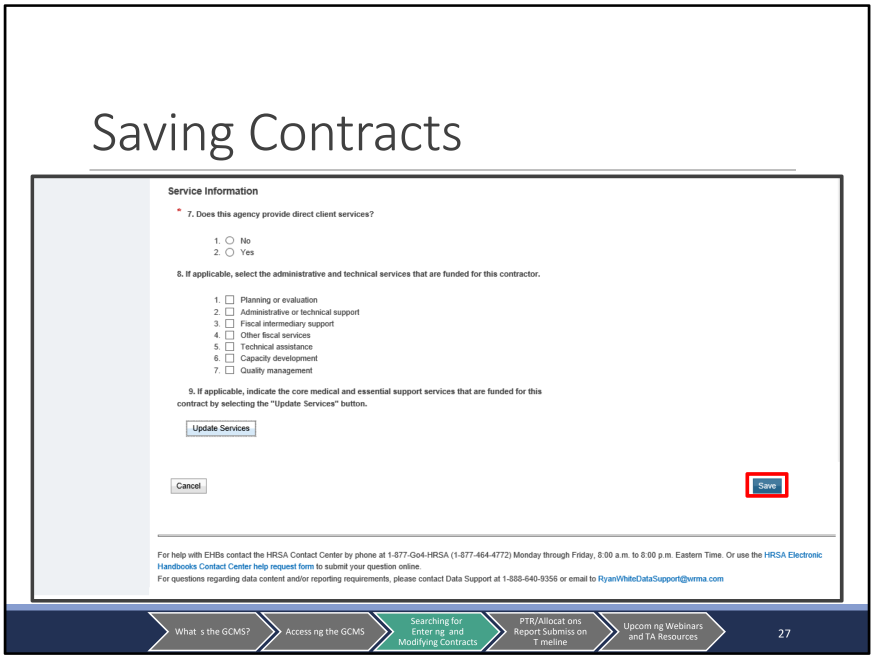
Indicate exactly how much funding went to each service category from your base award and remember to use only whole numbers.



Here is the update services table for Part B Supplemental grant recipients. Again, this table functions as those previously presented. Indicate amounts for all funded service categories using whole numbers and indicate whether they were funded with “Consortia” funds or “Direct Service” funds.

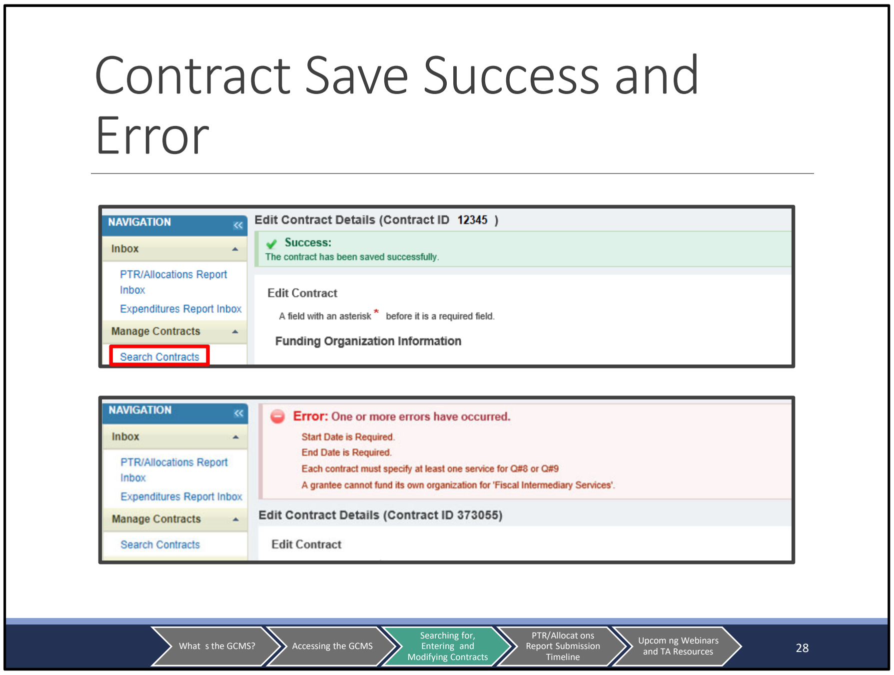


And lastly, this is the Allocations table for Part C and D recipients that we have seen previously. There is only one column, “Base Award” for funding amounts where you will indicate the dollar amount distributed for each service category this organization is funded to provide.



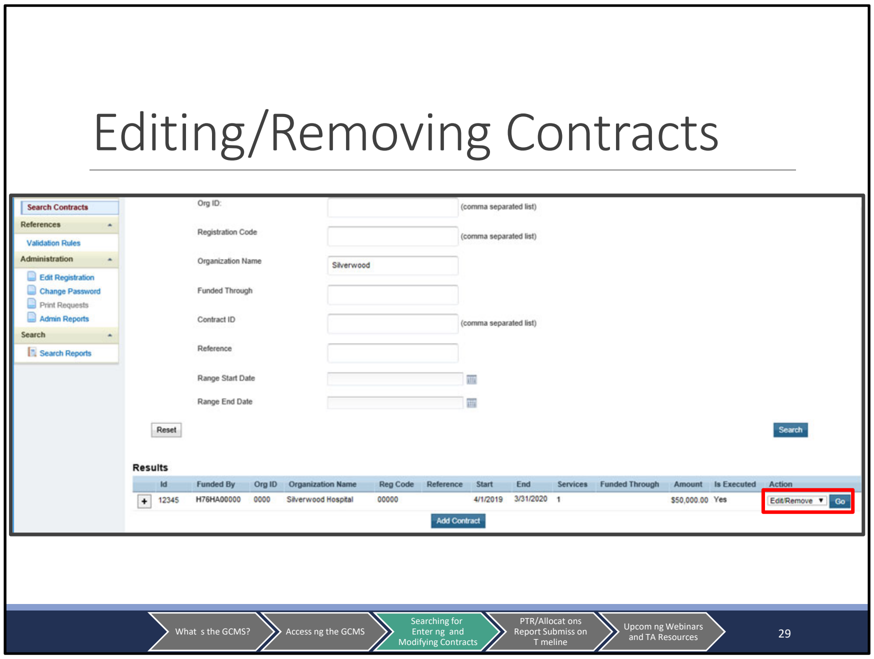
Now getting back to our instructions, after you have entered in all required information to your contract, click the “Save” button on the bottom right of the page. If you skip this step, then your contract will not be saved in the web system.

Additionally, you may have noticed in a previous screenshot a timer on the top right corner of the page. The web system allows for 30 minutes of continuous data entry before the entered data will be lost and your session will expire. This is especially important to consider when filling out your tables of funded service categories which we detailed on the previous few slides as this can sometimes be a time-consuming process. Remember to keep an eye on the timer and if you anticipate taking longer than 30 minutes on a single contract, you can click “Save” to save your work and refresh the timer.

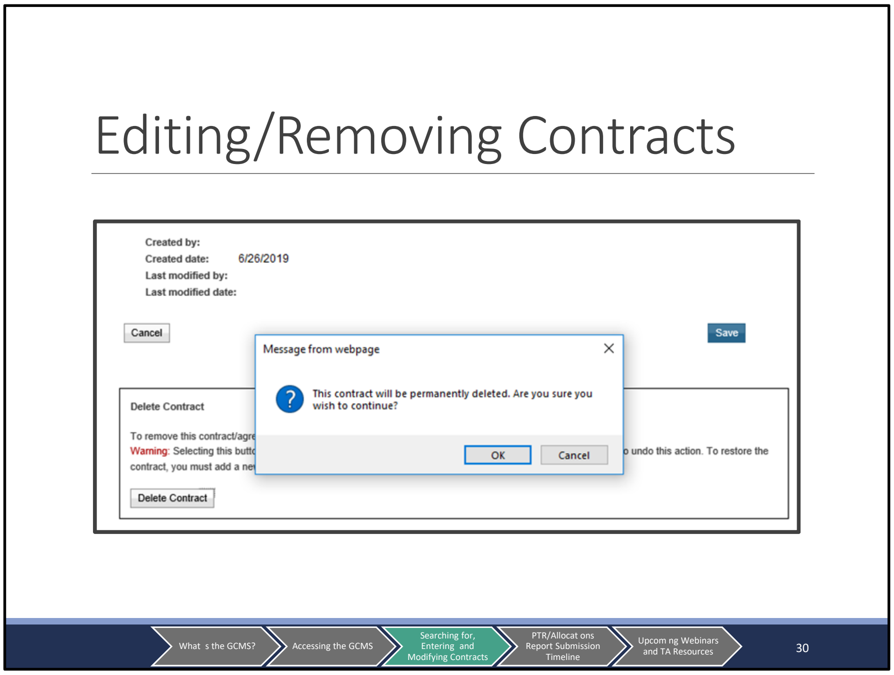


Once you click “Save,” if you have input everything correctly and answered all required questions, then you will see a green “Success” message like the one displayed on this slide and be returned to the contract details page. But if you have any errors, you’ll receive a red “Error” banner. The message in the banner will display the questions triggering the error. Use the instructions detailed earlier to make corrections to the contract details page and save your contract again.

Now let’s say your organization wanted to edit or remove a contract. You’ll start by navigating back to the GCMS. Remember to go back to the GCMS search page at any time, click on the “Search Contracts” link in the left-hand navigation panel.

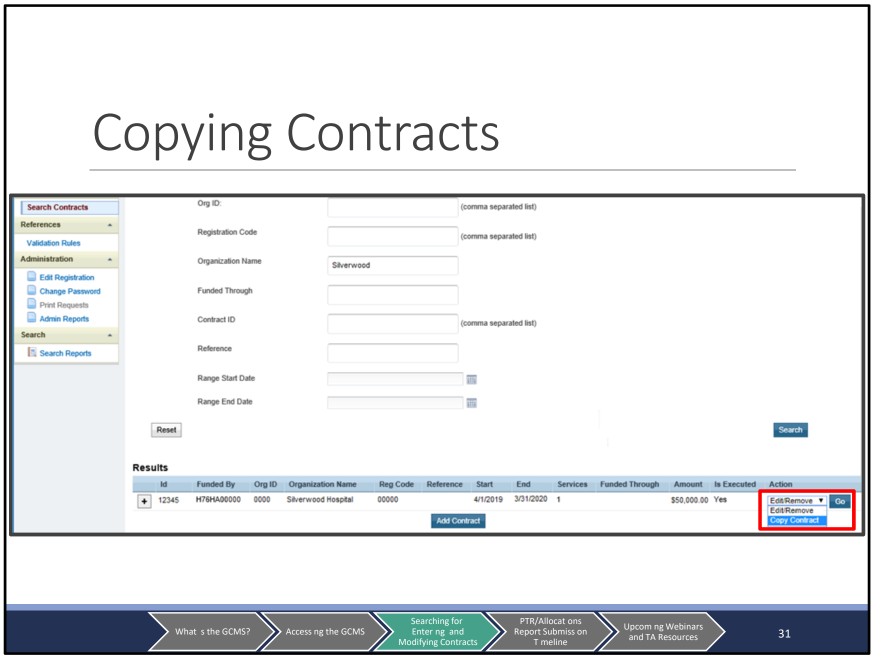


Once back in the GCMS, perform a search using the instructions detailed earlier in the presentation. When you have found the contract that you want to edit listed in the search results, select Edit/Remove in the drop-down menu under the far-right Action column and then click on “Go.”

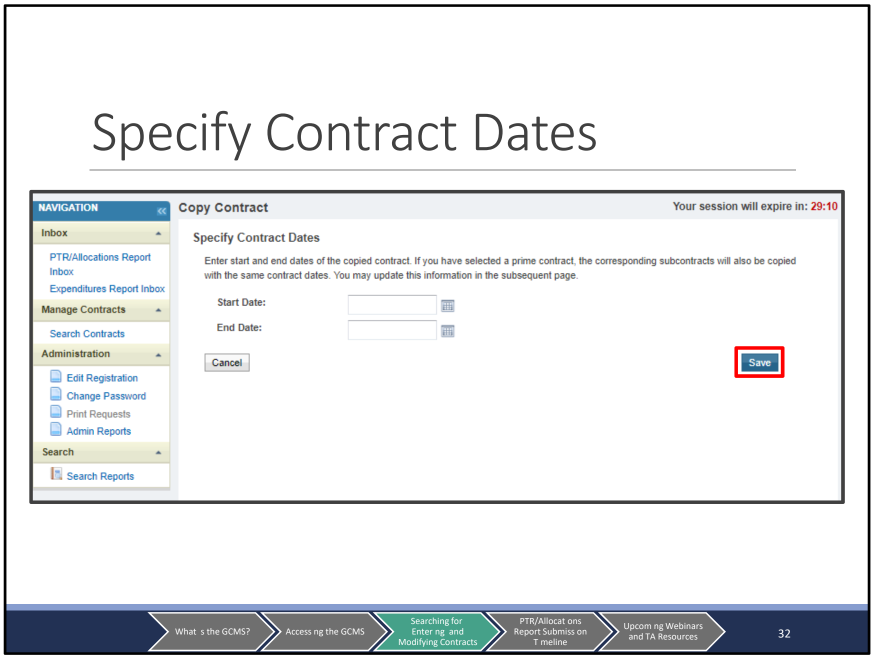


Clicking Edit/Remove will take you back to the Contract Details page seen earlier. If you just need to edit your contract, follow the steps provided earlier in the presentation for updating contract information and filling out contract details and click “Save” to save your changes.

If you need to delete the contract, scroll to the bottom of the contract page, and find this box shown on the slide labeled “Delete Contract.” If you click on the “Delete Contract” button, it will bring up a pop-up box asking if you are sure that you want to delete the contract. Clicking “OK” will permanently remove the contract from the GCMS. This cannot be undone or recovered, so if you are unsure, click “Cancel.”

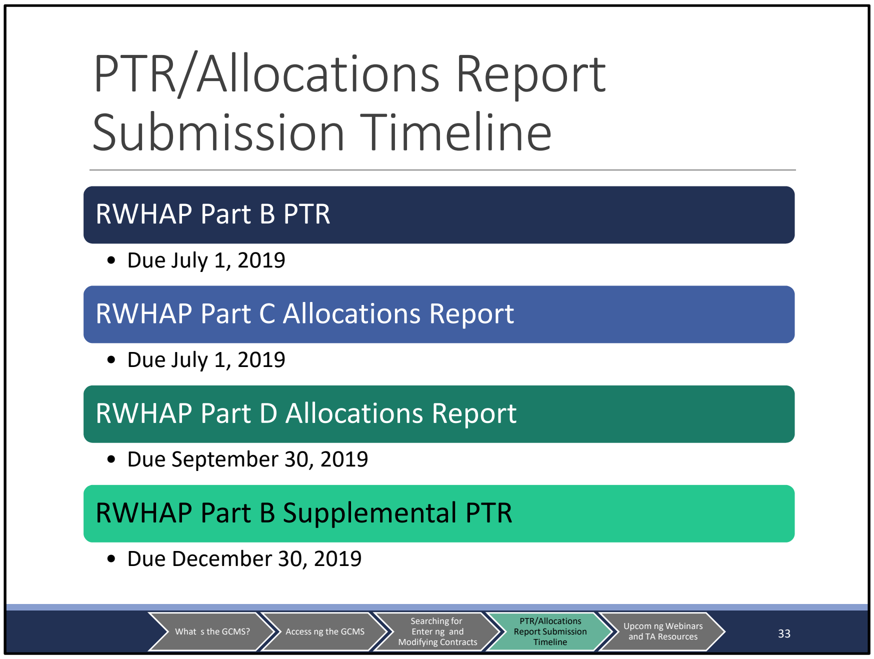


And lastly, there is one new feature I want to go over briefly. As part of the previously mentioned updates to the GCMS, you now have the ability to copy contracts. This feature can save you valuable time adding new contracts every year by streamlining part of the process. As a note, you will not be able to copy contracts for second-level providers. To access this feature, start by performing a search again like I detailed earlier in the presentation. Once you have found the contract that you want to copy, click on the drop-down menu in the far-right Action column and select “Copy Contract.” Then click on Go.

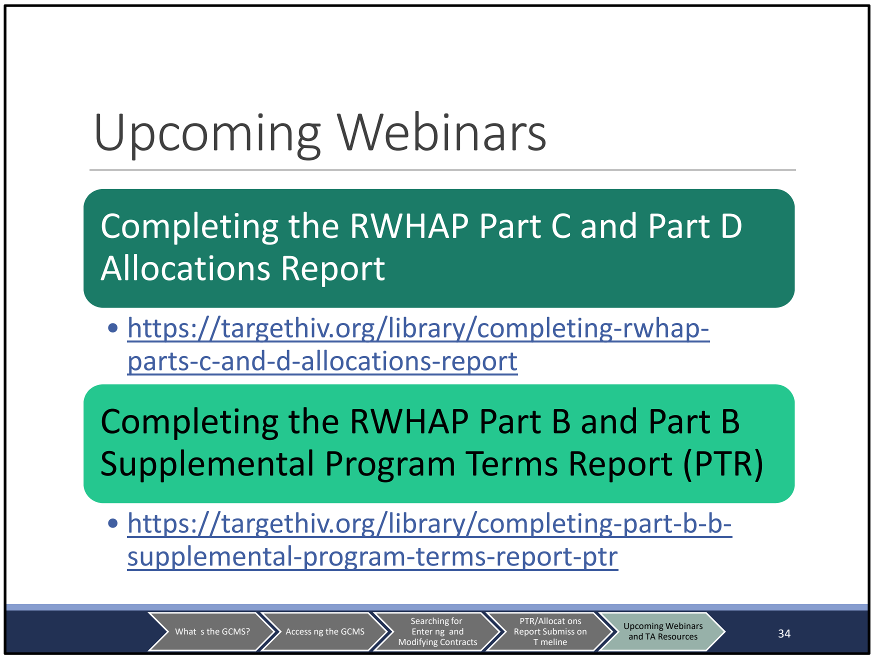


On the next page, specify the new dates for the contract you are copying. Once you have entered the correct dates, click Save on the bottom right. This will then take you to the contract details page which we went over previously. This page will be filled out already with your new contract dates and the rest of the contract details copied over. Make sure to review all fields for accuracy and make any updates as needed using the steps detailed earlier in the presentation.

With that we have come to the end of the GCMS instructions. That was definitely a lot of information that we went over so if there is anything that doesn't make sense or needs further clarification, I definitely recommend chiming in on the Q&A which we will start in just a few minutes at the end of the presentation. But now let's move on to the submission timeline.



The PTR and Allocations Report submission season is well underway. The due date for both the Part B PTR and the Part C Allocations Report has passed. Looking ahead, the Part D Allocations Report and Part B Supplemental PTR are both not quite available but will be very shortly. The Part D Allocations Report will be due on September 30 and the Part B Supplemental PTR will be due on December 30.

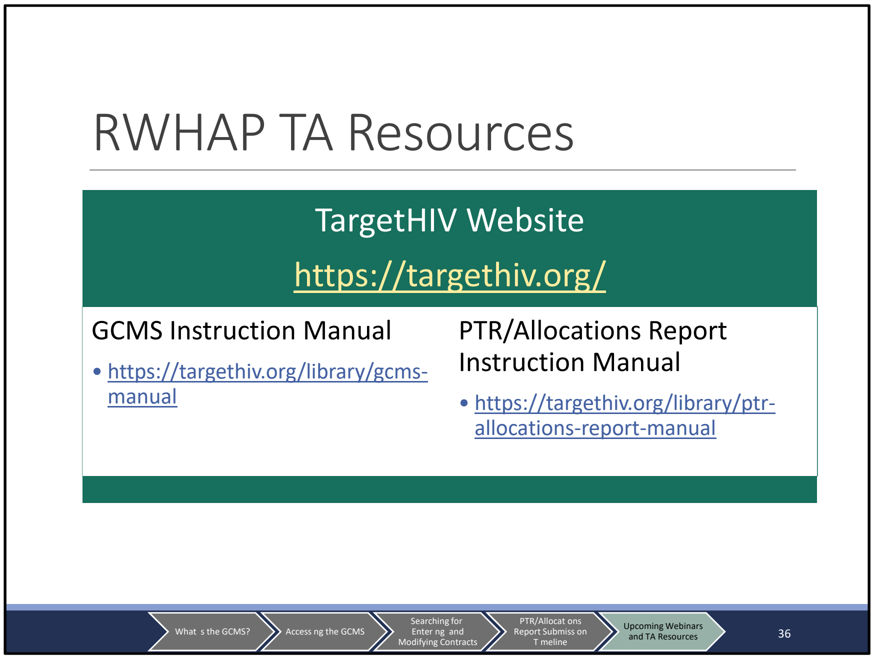


Here are the two upcoming webinars mentioned earlier to assist you in completing both of those reports. Both of these webinars have been presented previously this year and are available at the links on this slide, but we will also be presenting them live again in the upcoming months to coincide with the later reporting periods for the Part D Allocations Report and the Part B Supplemental PTR. Dates for those presentations will be forthcoming so stay tuned.

RWHAP TA Contacts

TA Resource Contact Information	Type of Technical Assistance
Ryan White HIV/AIDS Program Data Support **Phone: 888.640.9356** **Availability: 10 a.m. to 6:30 p.m. EST, Monday through Friday** **Email:** RyanWhiteDataSupport@wrma.com	• GCMS, PTR, and Allocations Report-related content and submission questions • Interpretation of the GCMS and PTR/Allocations Report Instruction Manual and HAB's reporting requirements • Assistance with registration codes • Data validation questions
HRSA Help Desk **Phone: 877.Go4.HRSA (877.464.4772)** **Availability: 8 a.m. to 8 p.m. EST, Monday through Friday** **Web site:** http://www.hrsa.gov/about/contact/ehbhelp.aspx	• Electronic Handbooks (EHBs) software-related questions ○ EHBs navigation ○ EHBs registration ○ EHBs access and permissions
Project Officer	• Program-related issues: ○ Budgets ○ Use of funds

Here is a list of the additional technical assistance resources available to assist you. Data Support addresses GCMS, PTR, and Allocations Report- related content and submission questions; interpretation of their associated manuals; and any general questions related to these systems. The HRSA Help Desk addresses questions related to the EHBs, such as registering for and navigating the EHBs, resetting passwords, and making sure that you have the right permissions to complete your reports. And for program related issues, such as budgets and use of funds, contact your project officer. And as usual, if you are unsure of who to contact, please contact either of the TA resources provided and we will be sure to direct you to where you need to go.

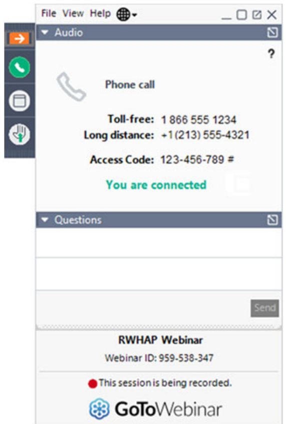


The TargetHIV website is the place to find a wealth of materials related to the Ryan White program and data reporting including the GCMS Manual, PTR and Allocations Report Instruction Manual, as well as archived and upcoming webinars.

Finally, to connect with and find out more about HRSA, check out HRSA.gov.

I’d like to take a moment thank everyone for joining us on today’s presentation and I will now turn it back over to Rachel for the Q&A portion of the webinar.

Questions?



- 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.