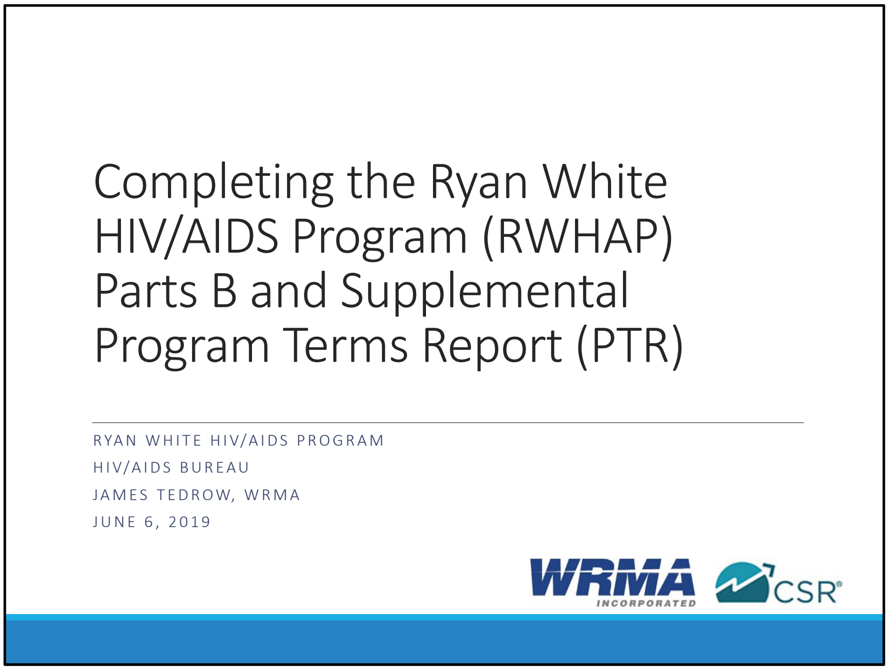


Presented by:
James Tedrow
Ryan White HIV/AIDS Program Data Support
Phone: (888) 640-9356
E-mail: RyanWhiteDataSupport@wrma.com

Presentation Date: June 5, 2019

Session Description:
Welcome to today's webcast. Thank you so much for joining us today!

My name is Rachel Gross. I'm a member of Data Support, the group engaged by HAB to provide training and technical assistance to Ryan White recipients during their sub mission of the Program Terms Report (or PTR).

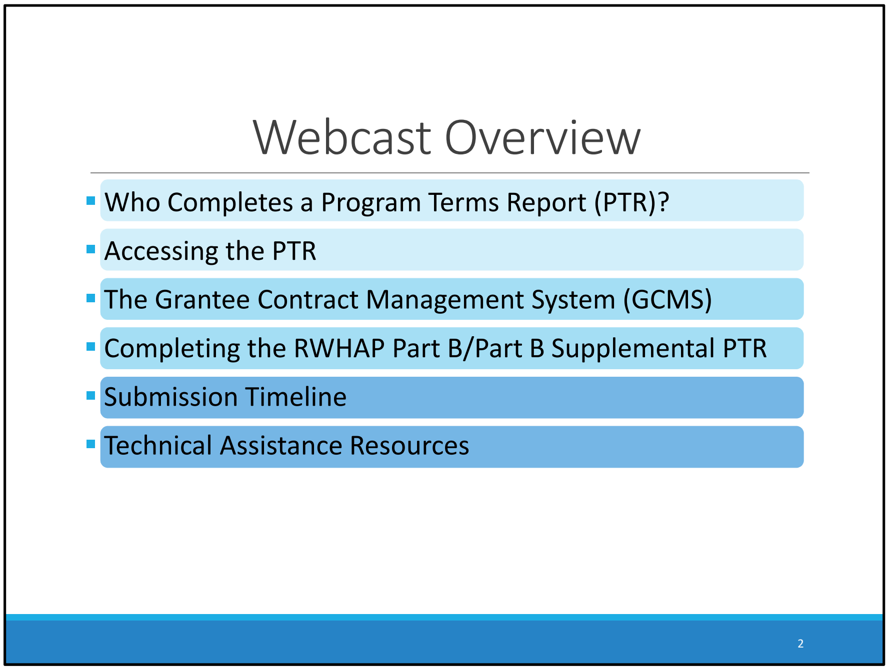
Today's webcast is presented by James Tedrow, from the WRMA/CSR Data Support Team. James will provide step-by-step guidance on how to complete the 2019 Part B and Part B Supplemental Program Terms Report, including accessing the report, completing the required sections, as well as validating and submitting your report.

We're happy to address your questions at any time during the presentation. Simply use the "Question" function on your control panel on the right-hand side of the screen. You also may ask questions "live" at the end of this presentation directly online. Please click the "raise hand" button (on your control panel) and I will conference you in. Alternatively, you can click the "telephone" button and you'll see a dial-in number and code.

We hope you consider asking questions "live," because we really like hearing voices other than our own.

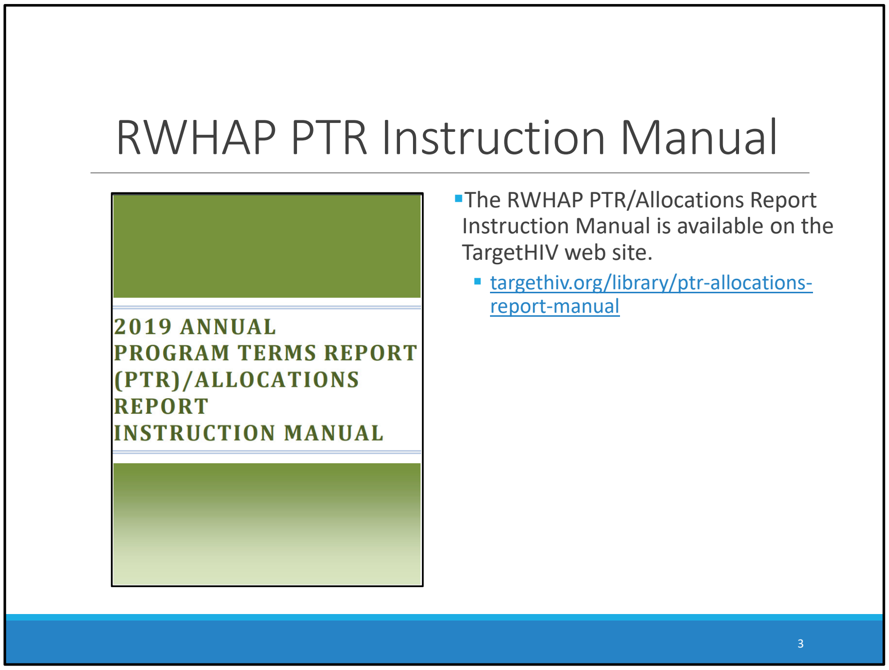
Now I'll turn this over to our presenter, James.

Thank you, Rachel!

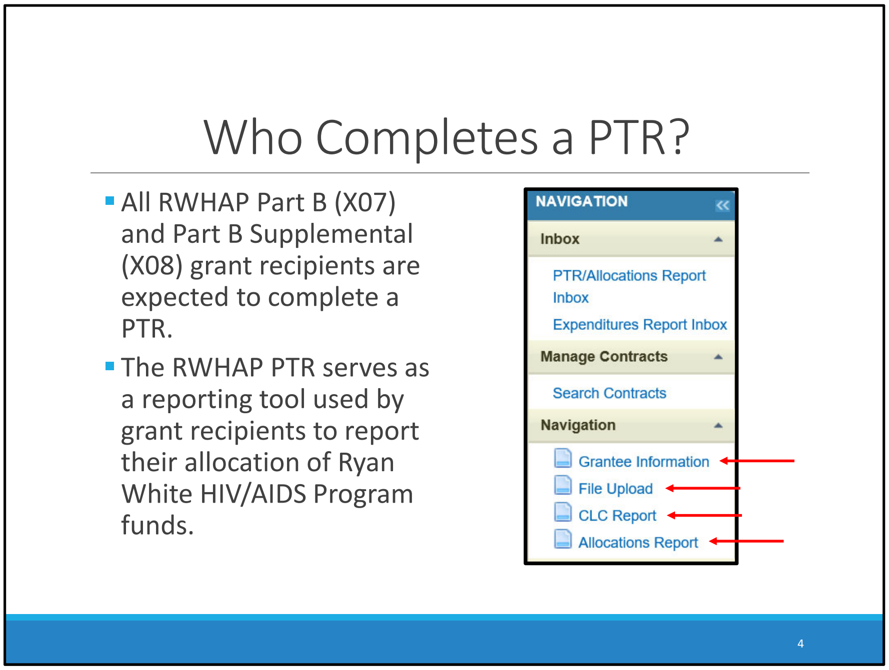


In today’s webcast, I’ll discuss all the details you must know to submit your 2019 Part B X07 and Part B Supplemental X08 Program Terms Report. For the remainder of the webcast, I will refer to the Program Terms Report as the PTR. I’ll begin by explaining who completes a PTR. Then, I’ll go over how to access the PTR followed by a brief description of the Grantee Contract Management System or GCMS. Next, I’ll discuss how to complete the PTR and finally, I’ll review the 2019 PTR Submission Timeline, and the TA Resources available to help you.

Let’s get started!



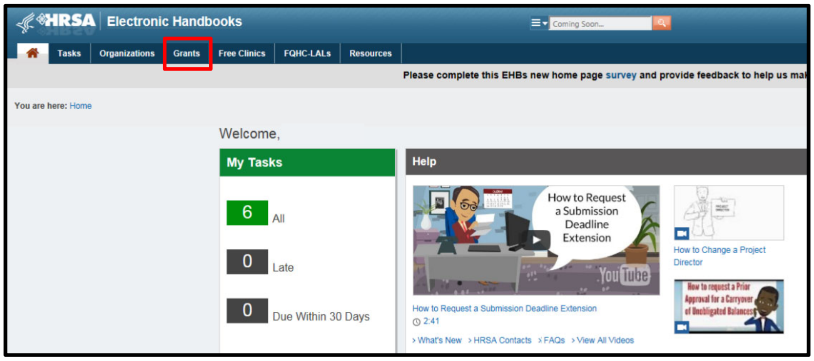
Information from today's presentation is covered in detail in the PTR Instruction Manual. This resource is an invaluable aid for completing your PTR. The guide is available for download on the TargetHIV website. If you still have questions, Technical Assistance resources will be displayed at the end of this presentation.



Let’s start by reviewing who needs to complete a PTR.

- All RWHAP Part B and Part B Supplemental grant recipients are expected to complete a PTR.
- The PTR serves as a reporting tool for grant recipients and is used to document their allocation of Ryan White Program funds, in accordance with the reporting requirements of the Notice of Award (NoA).
- The PTR includes the following: Grantee Information, File Upload, the Consolidated List of Contracts or CLC Report and, finally, the Allocations Report.

Accessing the PTR



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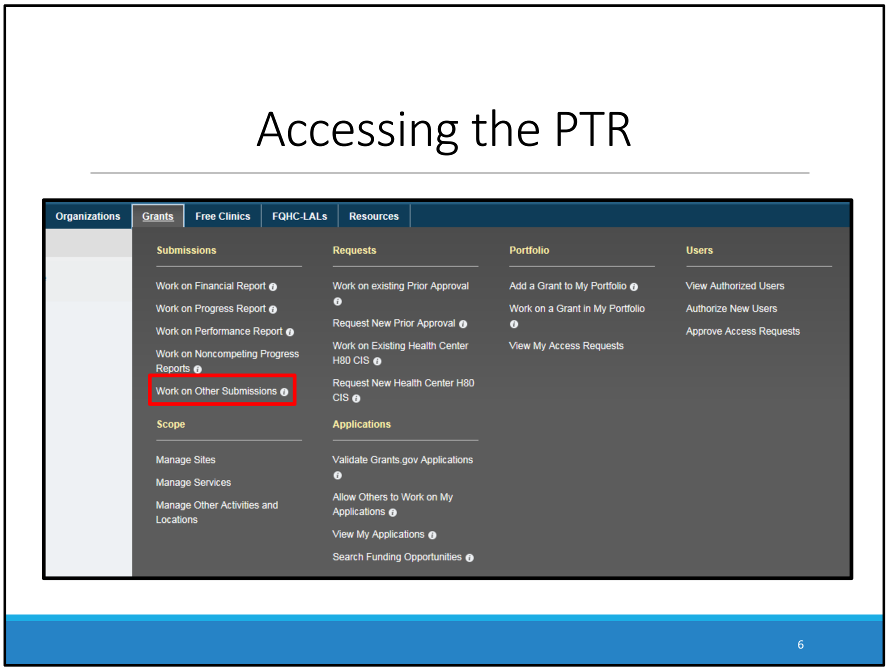
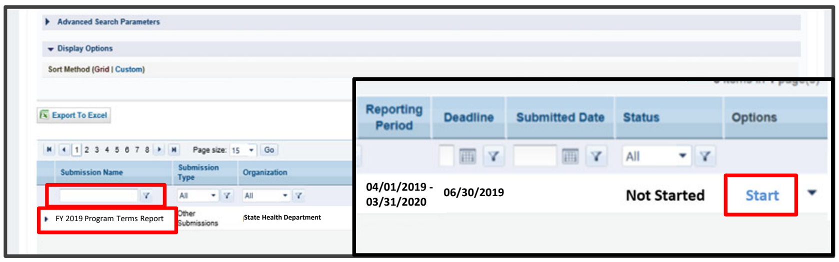
Now let’s go over how to access your PTR.

First, log onto the HRSA EHBs site. From the Homepage, hover your mouse over the “Grants” tab, which is located on the top left-hand side of the screen.



Using the “Grants” drop-down menu, select “Work on Other Submissions,” which is located under the “Submissions” header.

Accessing the PTR



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On the next page, use the “Submission Name” box to locate your most recent PTR submission. To make searching easier, you may want to use the filter tool located beneath the “Submission Name” heading. Simply type in all (or a portion of) the title of the report to pare down the full submissions list. Once you have located your 2019 PTR, select the “Start” or “Edit” link, which appears at the far right-hand side of the page under “Options.” Because this is the first time we’ve accessed this report, the link reads “Start.” Once we’ve started our report the link will read “Edit.”

Accessing the PTR

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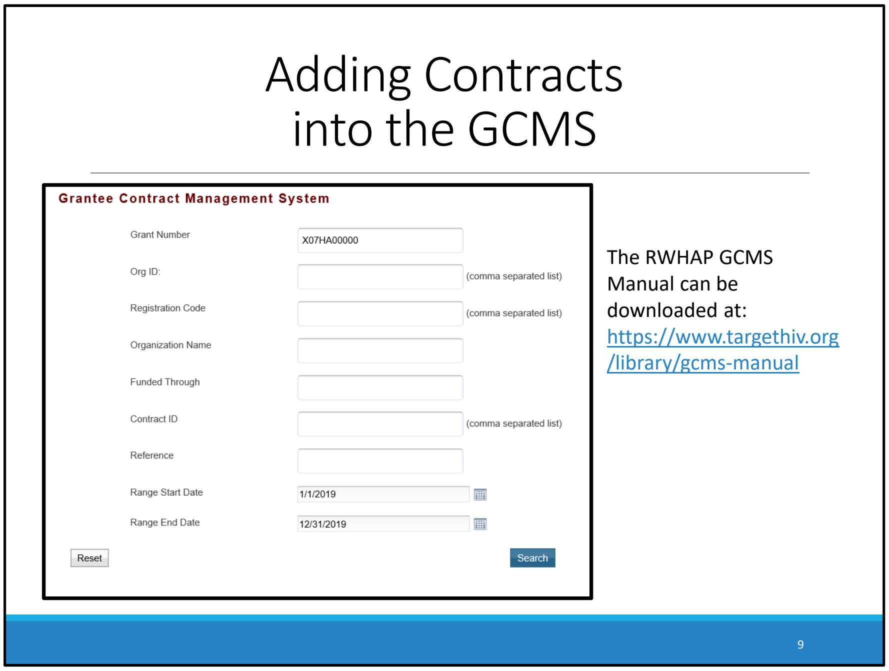
Clicking "Start" will open your PTR Inbox. From here, you will be prompted to create or open your report.

Note: If you have not already created your 2019 PTR, we strongly recommend that you add your contracts with sub-recipients into the Grantee Contract Management System, or GCMS, *before* creating your report. This will make the process much easier. To access the GCMS, click "Search Contracts" in the navigation panel on the left-hand side of the page.

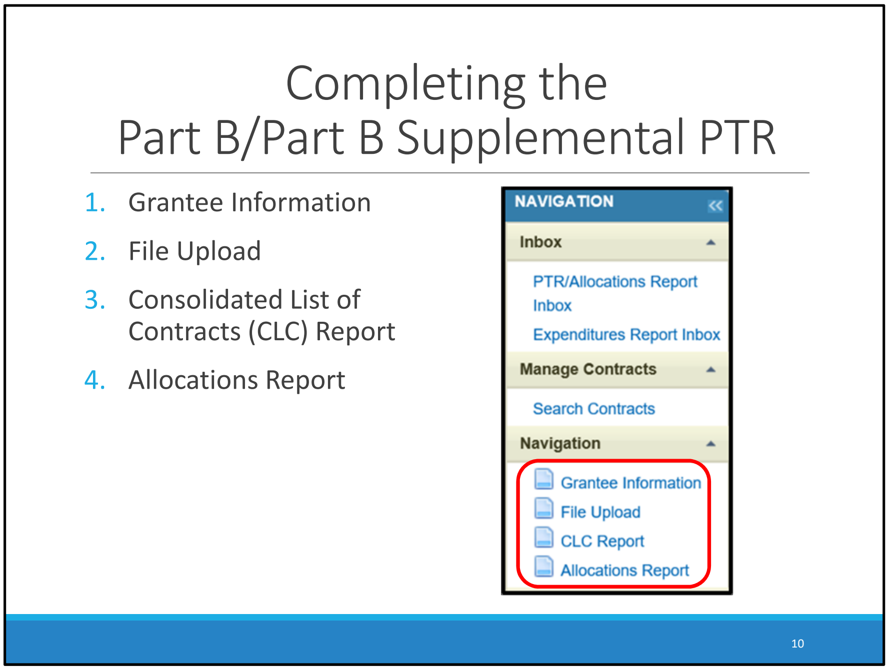


Begin by adding and reviewing your contracts in the 2019 Grantee Contract Management System. For further information, Data Support encourages everyone to attend the Grantee Contract Management System webinar, scheduled for June 26. We recommend too that you review the GCMS Manual. A link to this manual is provided on the screen. Note: The 2019 GCMS manual will be released very soon and will be made available on TargetHIV.

As a reminder, the GCMS is available year-round, allowing recipients to regularly review and update contract information, as needed.

As a brief refresher, let's take a look at the main search screen of the Grantee Contract Management System.

Your grant number will be listed automatically in the box. It's also a good idea to search for your grant using the start and end date range that covers the year 2019. Using these search parameters will produce grant results that include only those contracts funded during 2019. However, you can further expand or limit your search by including more or less information in the search fields.

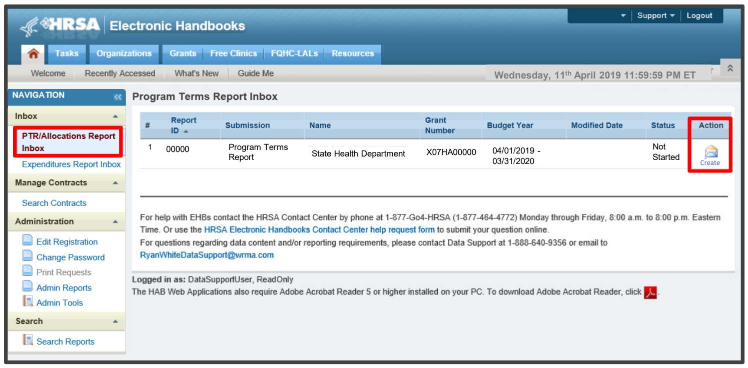


We are now ready to discuss how to complete the Part B and Part B Supplemental PTR.

The 2019 PTR includes 4 sections: Grantee Information, File Upload, CLC Report (or Consolidated List of Contracts Report), and the Allocations Report.

I will discuss each of these sections in detail in the coming slides.

Creating the PTR



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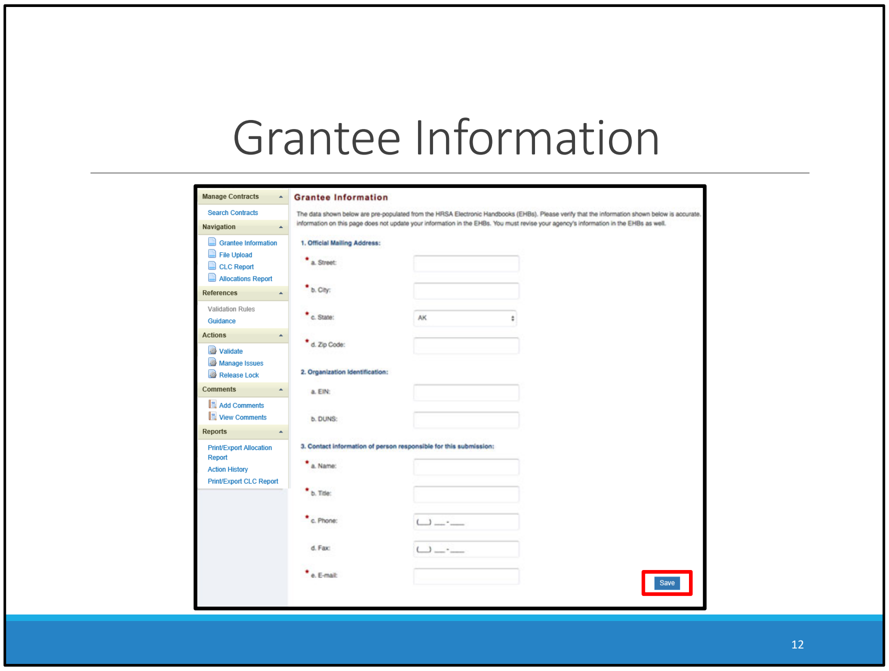
To return to the PTR Inbox, simply click “PTR/Allocations Report Inbox” on the Navigation panel, which is located on the left-hand side of the screen.

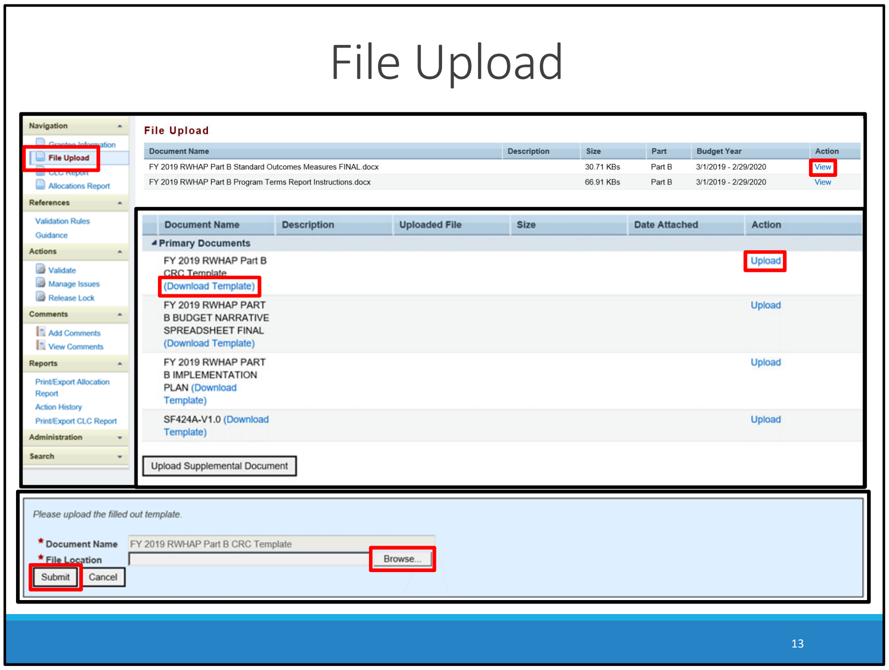
Now, we can create the Report. From your Program Terms Report Inbox, locate the envelope icon under the “Action” column and select “Create.” As noted earlier, if you already have created your report, the envelope icon will read “Open.” If you need a refresher on how to access the PTR Inbox, please refer to slides 5 through 8.



Congratulations! You are now within the PTR. Once the PTR is open, you will see the "Grantee Information" page.

The first section, Official Mailing Address, is already filled in with information from the EHBs. The second section includes your EIN and DUNS number, and the third section includes the contact information of the person responsible for submitting the PTR.

It is vital that you review this information to ensure it is accurate and up to date. To make changes to any information within your EHBs account, please contact the HRSA Help Desk. Once you have confirmed the information is correct, select the "Save" button on the lower right-hand corner of the page.

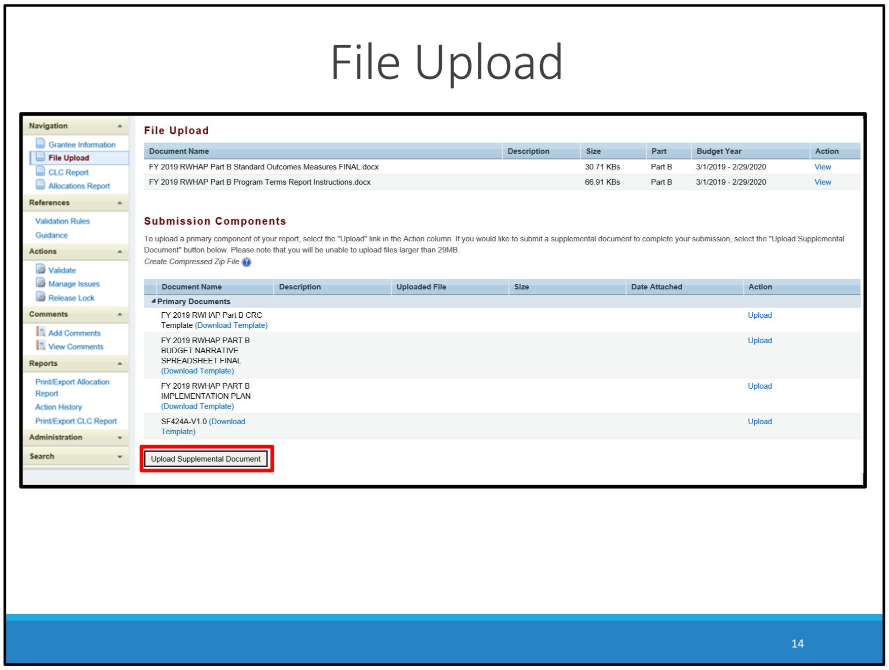


Next we'll look at the File Upload section. To access this section, click "File Upload" under the "Navigation" header, located on the navigation panel on the left-hand side of the page.

At the top of the page, under the red header, click "File Upload." Click "View" to download and review the Part B PTR instructions. This document gives specific Program Part instructions for completing and submitting the PTR.

For Part B recipients, all required PTR documents must be uploaded using the web application. These required documents include the Contract Review Certification (or CRC), the Implementation Plan, the Budget Narrative, and the SF-424A.

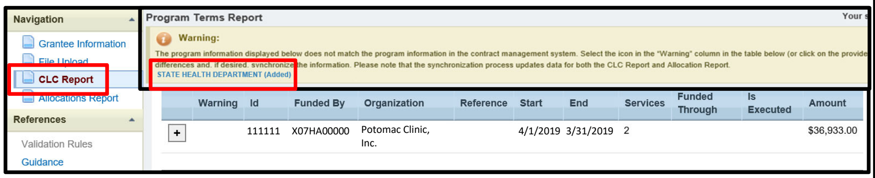
Download the necessary templates for each document listed by clicking "Download Template." Once completed, save each template to your computer in a folder or drive that is easy to access. When you are ready to upload, go to the "Action" column and select "Upload." This will open a new field at the bottom of the page. Select "Browse" to locate and select the completed template. Then click "Submit" to upload the document.



Some agencies will require you to submit documents besides those listed under the “Primary Documents” section. If your Project Officer requires additional documentation, or your agency would like you to upload more information, you must use the “Upload Supplemental Document” link located at the bottom of the page.

Consolidated List of Contracts (CLC) Report

- Any contracts changed or added within the RWHAP GCMS after creating your RWHAP PTR must be synchronized!



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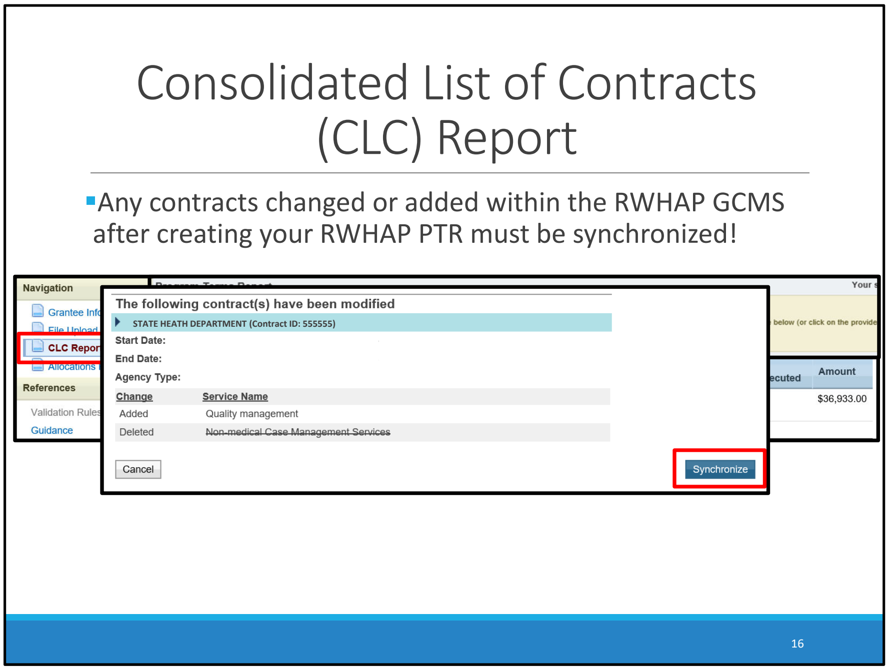
The next section of the PTR is the CLC Report. On the navigation panel, under the "Navigation" header, select "CLC Report" to view a full list of contracts funded by your Ryan White Part B funding.

The Consolidated List of Contracts (or CLC) lists all the Ryan White sub-recipients funded with your agency's Part B grant. The list is generated automatically based on information previously entered into the GCMS. (If you followed the recommended steps and entered your contracts *before* creating your report, you should see your contracts listed.)

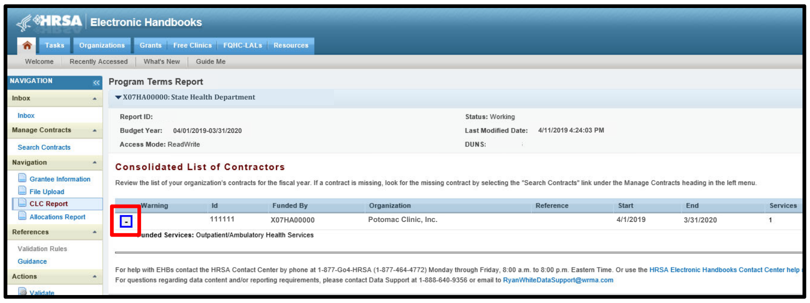
However, if you changed or added any contracts after creating your PTR, you must synchronize the PTR with the GCMS before continuing. Such errors will be denoted by a yellow warning banner, like the one seen here. In such cases, select the agency's name, shown in blue within the banner.



A page will appear with the new information. Once you confirm the changes are accurate, select "Synchronize" on the bottom right-hand side of the page.

As a reminder, your PTR MUST be in "Working" status to synchronize. If you need to synchronize any changes after submitting your report, please contact Ryan White Data Support for assistance.

CLC Report



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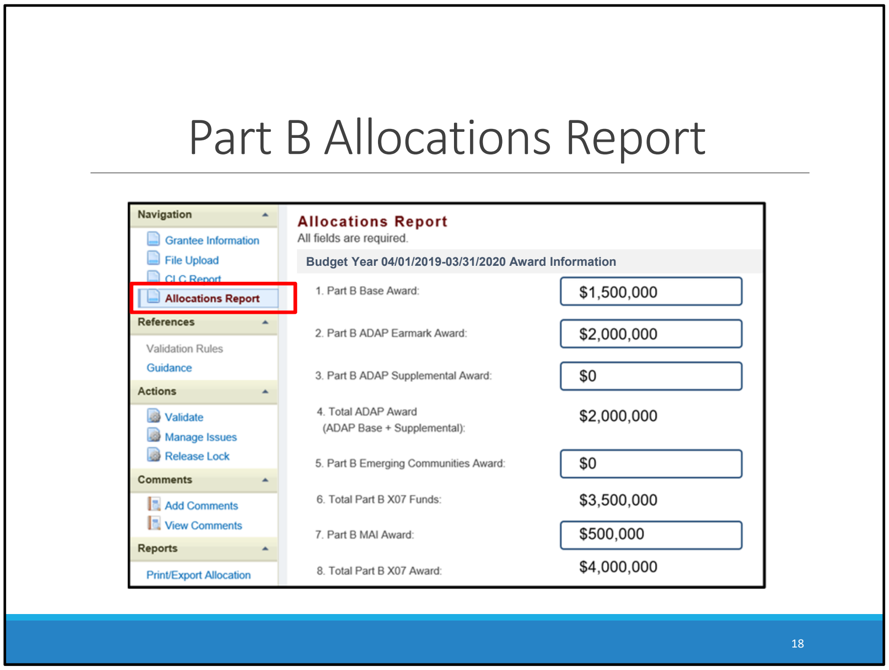
After synchronizing the report, be sure to review each sub-recipient listed under the Consolidated List of Contracts header.

On the left-hand side of each sub-recipient listed, select the expansion button. This will show the services that each sub-recipient has been funded to provide. Confirm that your organization has entered this information correctly. Any changes will need to be made within the GCMS and then synchronized before continuing.



The last section of the PTR is the Allocations Report.

On the navigation panel, located under the “Navigation” header, select “Allocations Report” to view the Part B Allocations Report.

The Allocations Report page has several editable fields that must be completed using your agency’s final Notice of Award (NoA) and your agency’s final budget. As a reminder, when allocating funds within the Allocations Report or in your internal budgets, be sure to use only whole numbers.

Under the Budget Year Award Information section, there are 8 fields:

1. Part B Base Award
2. Part B ADAP Earmark Award
3. Part B ADAP Supplemental Award
4. Total ADAP Award
5. Part B Emerging Communities Award
6. Total Part B X07 Funds
7. Part B MAI Award
8. Total Part B X07 Award

(Note that #4, #6, and #8 are not editable. These totals will be generated based on your other entries within the Allocations Report section.)

Part B Allocations Report

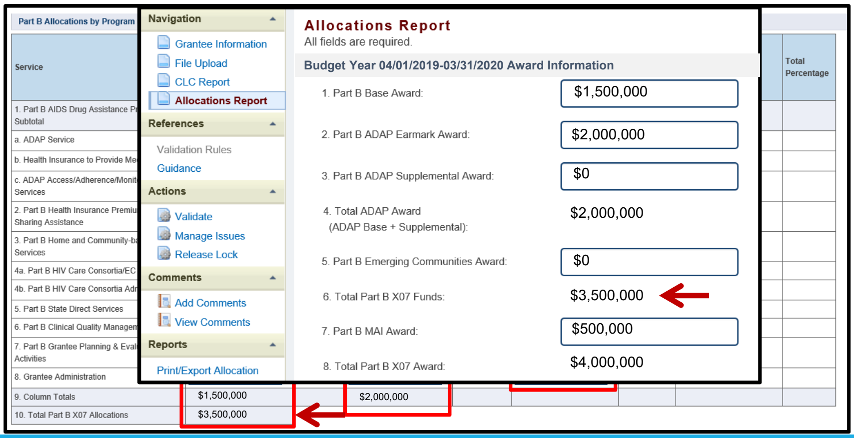
Part B Allocations by Program Component

Service	Base Award Amount	Base Award Percentage	ADAP + ADAP Supplemental Award Amount	ADAP + ADAP Supplemental Award Percentage	Emerging Communities Award(EC) Amount	Emerging Communities Award(EC) Percentage	Total Amount	Total Percentage
1. Part B AIDS Drug Assistance Program Subtotal								
a. ADAP Service			$2,000,000					
b. Health Insurance to Provide Medications								
c. ADAP Access/Adherence/Monitoring Services								
2. Part B Health Insurance Premium & Cost Sharing Assistance								
3. Part B Home and Community-based Health Services								
4a. Part B HIV Care Consortia/EC Services								
4b. Part B HIV Care Consortia Administration								
5. Part B State Direct Services	$1,500,000							
6. Part B Clinical Quality Management								
7. Part B Grantee Planning & Evaluation Activities								
8. Grantee Administration								
9. Column Totals	$1,500,000		$2,000,000					
10. Total Part B X07 Allocations	$3,500,000							

If you scroll down further on the page, you will see the “Part B Allocations by Program Component” section. Here, some text boxes are editable and others will be automatically generated based on your other entries or amounts entered into the GCMS.

For this section, enter the appropriate amounts for each Service. This will depend on which Award is funding the service. The services listed will either be funded by the Base Award, the ADAP + ADAP Supplemental Award, or the Emerging Communities Award.

Part B Allocations Report



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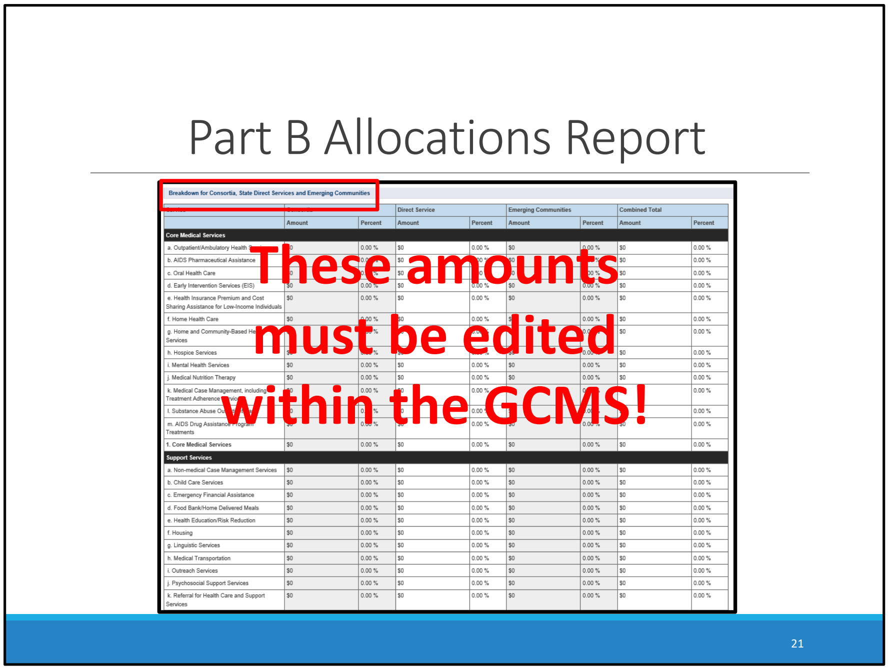
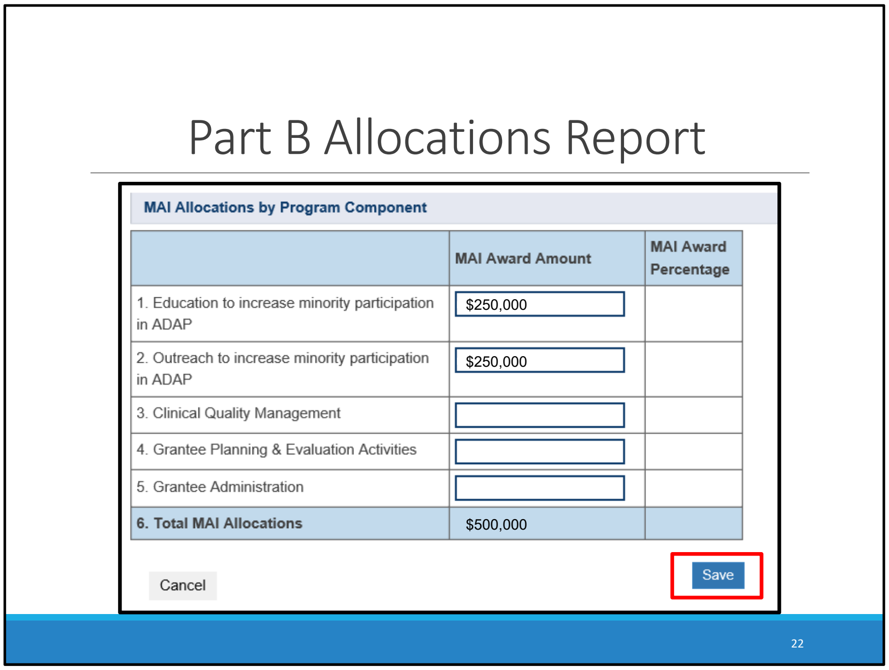
Note: Once you save the Allocations Report, the amount listed in #10 Total Part B X07 Allocations must equal your #6 “Total Part B X07 Funds” from the previous section.



Breakdown for Consortia, State Direct Services and Emerging Communities

Service	Consortia		Direct Service		Emerging Communities		Combined Total	
	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent
Core Medical Services								
a. Outpatient/Ambulatory Health S[illegible]	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
b. AIDS Pharmaceutical Assistance	[illegible]	[illegible]	$0	[illegible]	$0	[illegible]	$0	0.00 %
c. Oral Health Care	[illegible]	[illegible]	$0	[illegible]	[illegible]	[illegible]	$0	0.00 %
d. Early Intervention Services (EIS)	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Health Insurance Premium and Cost Sharing Assistance for Low-Income Individuals	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Home Health Care	$0	0.00 %	$0	0.00 %	[illegible]	0.00 %	$0	0.00 %
g. Home and Community-Based He[illegible] Services	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	$0	0.00 %
h. Hospice Services	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	$0	0.00 %
i. Mental Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Medical Nutrition Therapy	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Medical Case Management, including Treatment Adherence [illegible]	[illegible]	0.00 %	[illegible]	0.00 %	[illegible]	[illegible]	[illegible]	0.00 %
l. Substance Abuse Ou[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0.00 %
m. AIDS Drug Assistance [illegible] Treatments	[illegible]	0.00 %	[illegible]	0.00 %	[illegible]	[illegible]	$0	0.00 %
1. Core Medical Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
Support Services								
a. Non-medical Case Management Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
b. Child Care Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
c. Emergency Financial Assistance	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
d. Food Bank/Home Delivered Meals	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Health Education/Risk Reduction	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Housing	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
g. Linguistic Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
h. Medical Transportation	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
i. Outreach Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Psychosocial Support Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Referral for Health Care and Support Services	$0	0.00 %	$0	0.00 %	$0	0.00 %	$0	0.00 %

The next section of the Allocations Report is the "Breakdown for Consortia, State Direct Services, and Emerging Communities." All fields in this table are automatically generated using the information your organization entered into the GCMS. To modify these service category totals, you must first change the contracts in the GCMS for the sub-recipients providing these services.



Part B Allocations Report

MAI Allocations by Program Component

	MAI Award Amount	MAI Award Percentage
1. Education to increase minority participation in ADAP	$250,000	
2. Outreach to increase minority participation in ADAP	$250,000	
3. Clinical Quality Management		
4. Grantee Planning & Evaluation Activities		
5. Grantee Administration		
6. Total MAI Allocations	$500,000	

Cancel Save

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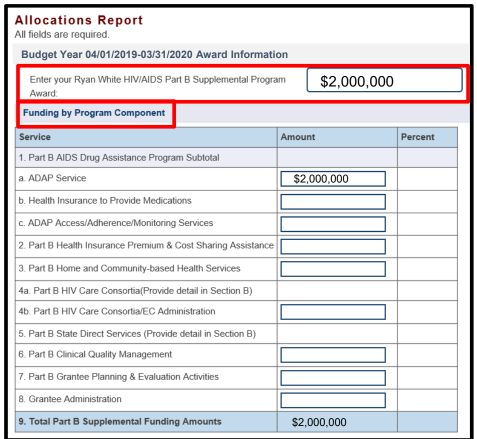
The last section of the Allocations Report is “MAI (or Minority AIDS Initiate) Allocations by Program Component.” As a reminder, the Total MAI Allocations amount must equal the MAI total award found in your NoA.

Once all necessary editable fields are complete, scroll to the bottom of the page. On the right-hand side of the page select, “Save.”

Part B Supplemental Allocations Report



Allocations Report

All fields are required.

Budget Year 04/01/2019-03/31/2020 Award Information

Enter your Ryan White HIV/AIDS Part B Supplemental Program Award: $2,000,000

Funding by Program Component

Service	Amount	Percent
1. Part B AIDS Drug Assistance Program Subtotal		
a. ADAP Service	$2,000,000	
b. Health Insurance to Provide Medications		
c. ADAP Access/Adherence/Monitoring Services		
2. Part B Health Insurance Premium & Cost Sharing Assistance		
3. Part B Home and Community-based Health Services		
4a. Part B HIV Care Consortia(Provide detail in Section B)		
4b. Part B HIV Care Consortia/EC Administration		
5. Part B State Direct Services (Provide detail in Section B)		
6. Part B Clinical Quality Management		
7. Part B Grantee Planning & Evaluation Activities		
8. Grantee Administration		
9. Total Part B Supplemental Funding Amounts	$2,000,000	

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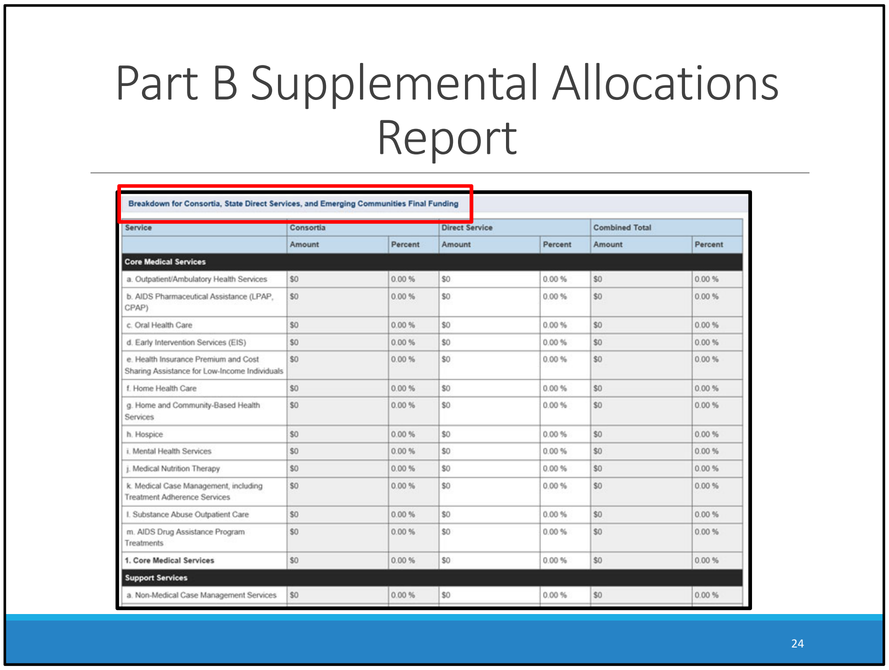
For Part B Supplemental PTRs, the Allocations Report section will include an editable box for your Part B Supplemental Program Award and the “Funding by Program Component” section.

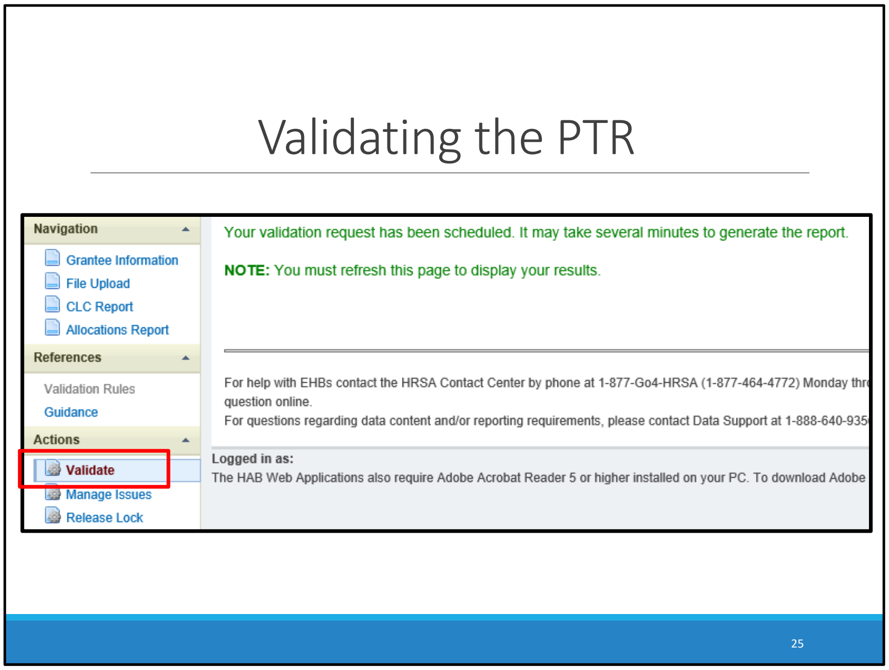


Breakdown for Consortia, State Direct Services, and Emerging Communities Final Funding

Service	Consortia		Direct Service		Combined Total	
	Amount	Percent	Amount	Percent	Amount	Percent
Core Medical Services						
a. Outpatient/Ambulatory Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
b. AIDS Pharmaceutical Assistance (LPAP, CPAP)	$0	0.00 %	$0	0.00 %	$0	0.00 %
c. Oral Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
d. Early Intervention Services (EIS)	$0	0.00 %	$0	0.00 %	$0	0.00 %
e. Health Insurance Premium and Cost Sharing Assistance for Low-Income Individuals	$0	0.00 %	$0	0.00 %	$0	0.00 %
f. Home Health Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
g. Home and Community-Based Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
h. Hospice	$0	0.00 %	$0	0.00 %	$0	0.00 %
i. Mental Health Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
j. Medical Nutrition Therapy	$0	0.00 %	$0	0.00 %	$0	0.00 %
k. Medical Case Management, including Treatment Adherence Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
l. Substance Abuse Outpatient Care	$0	0.00 %	$0	0.00 %	$0	0.00 %
m. AIDS Drug Assistance Program Treatments	$0	0.00 %	$0	0.00 %	$0	0.00 %
1. Core Medical Services	$0	0.00 %	$0	0.00 %	$0	0.00 %
Support Services						
a. Non-Medical Case Management Services	$0	0.00 %	$0	0.00 %	$0	0.00 %

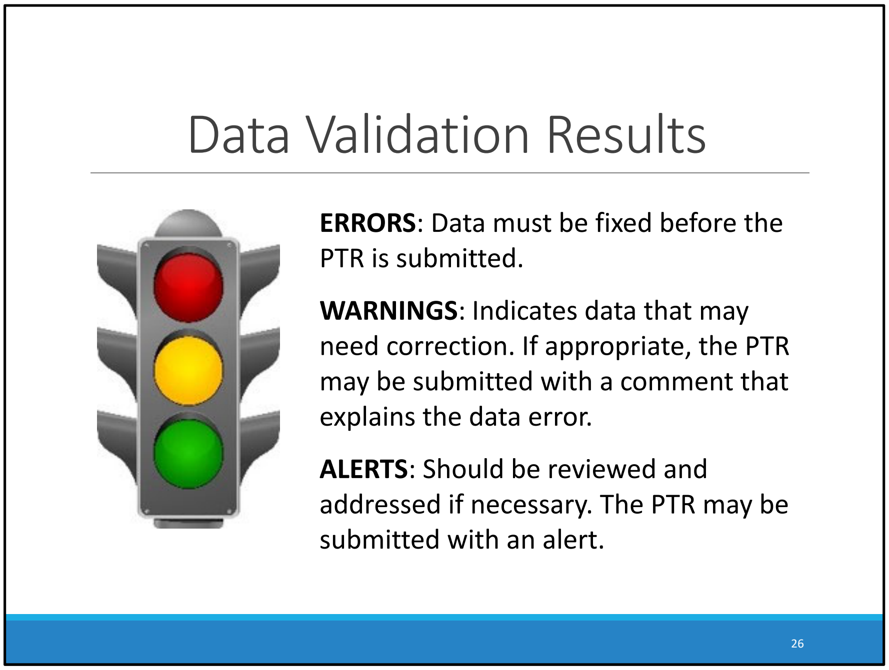
It will also include the "Breakdown for Consortia and State Direct Services" section, which is automatically filled in using information from your GCMS.

All other Part B Supplemental PTR sections will be the same as the Part B PTR sections.



Congratulations! All 4 sections of the PTR have been completed! We are now ready to validate our report.

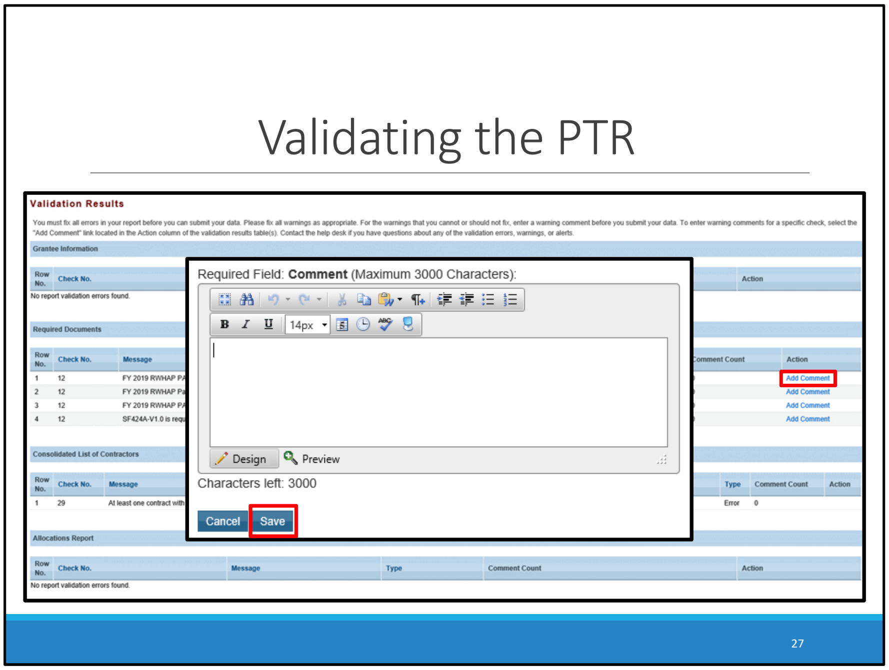
Go to the navigation panel on the left-hand side of the page. Under the “Actions” header, select “Validate” to check and confirm your Part B PTR. Validation may take several minutes to complete. In such cases, a system message will appear to prompt you to “refresh” the page. Refresh by going to the navigation panel and, under the “Actions” header, select “Validate” again. Alternatively, you can use your web browser and simply select the “Refresh” icon. The system will either display your validation results or you will be asked to continue to wait while the PTR web application processes your request.



After validation, you will either receive a congratulatory message stating that your report does not have any issues, or the validation results may show problems that need to be fixed before submission. Data issues will appear as one of three categories: an error, warning, or alert. These results can be traced to a problem with the data that will need to be resolved before the PTR can be submitted to HAB.

Validation warnings often are triggered by inconsistent data entry. You should review and attempt to resolve all the warnings in your report before submitting your PTR/Allocations Report. However, if you unable or unauthorized to fix the data, you may still submit a PT/Allocations Report with a warning in the validation section. Be sure to respond to each warning by including a detailed comment before submitting your report. We recommend that you print out the list of warnings so they may be resolved before the next reporting period. Remember: Warnings may be elevated to errors in future reporting periods.

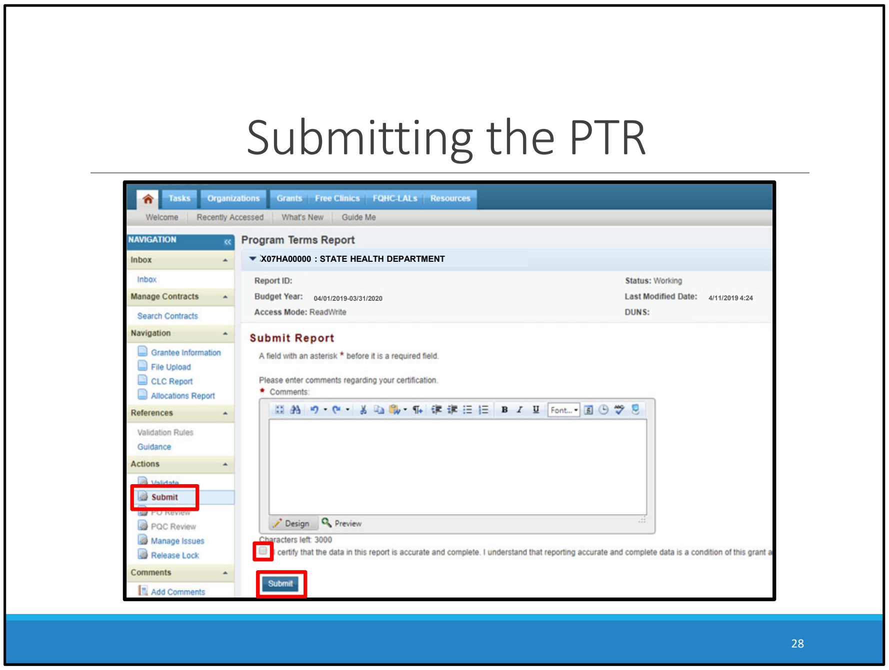
Data checks in the PTR/Allocations Report system also may return “alerts” during validation. Data alerts are typically informative. They are there to help you identify potential issues with your data. However, as with the warnings, I do encourage you to review each alert, because alerts may be reclassified as warnings or errors in future reporting periods.



Validation results can be categorized as errors, warnings, or alerts, as shown on the previous slide.

Use the comment section to address these errors. Select "Add Comment" under the "Action" column. A new window will appear. Using this box, enter text to explain the warning. When complete, select "Save" at the bottom of the text box. Any changes you make to the information in your report must be validated again before completing your submission.

Once all errors, warnings, and alerts have been addressed, you are ready to "Submit" your report.



On the Navigation Panel on the left-hand side of the page, under the “Action” header, select “Submit.” A new page will open and will include a comment box. You must enter a comment. Check the box at the bottom to indicate that the data in your report are accurate and complete. Select “Submit.”

Congratulations! You have now submitted your PTR!

Now, let’s discuss the submission timeline.

Submission Timeline

- RWHAP Part B X07 PTR is due 90 days from the Notice of Award (NoA) issue date.
  - RWHAP Part B X07 PTR web system will close on **July 1, 2019**.
- RWHAP Part B Supplemental X08 PTR is due 90 days from the NoA issue date.
  - RWHAP Part B Supplemental X08 PTR web system will close on **December 30, 2019**.

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The RWHAP Part B X07 PTR and the Part B Supplemental X08 PTR are due 90 days from the Notice of Award (NoA) issue dates.

This year, the RWHAP Part B X07 PTR web system will close on July 1, 2019 and the RWHAP Part B Supplemental X08 PTR web system will close on December 30, 2019.

However, submitting sooner is always better than later, so we encourage you to get working on this as soon as possible!

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	• PTR-related content and submission questions; • Interpretation of the PTR 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
	• PTR software-related questions
	  ○ Electronic Handbook (EHB) navigation;
	  ○ EHB registration;
	  ○ EHB access and permissions;
	  ○ Performance Report submission statuses.

Project Officer	• Program-related issues:
	  ○ Budgets; and
	  ○ Use of funds

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The following Ryan White Technical Assistance Resources are available to you.

Data Support addresses PTR-related content-and-submission questions, including interpretation of the PTR Instruction Manual and HAB's reporting requirements; assistance with registration codes; and data validation questions.

The HRSA Help Desk provides assistance with the EHB, including navigation, registration, access, and permissions.

And for program-related issues, such as budgets and use of funds, please contact your Project Officer.

TA Resources

TargetHIV website

- https://targethiv.org/

RWHAP PTR/Allocations Report Manual

- https://targethiv.org/library/ptr-allocations-report-manual

RWHAP GCMS Instruction Manual

- https://www.targethiv.org/library/gcms-manual

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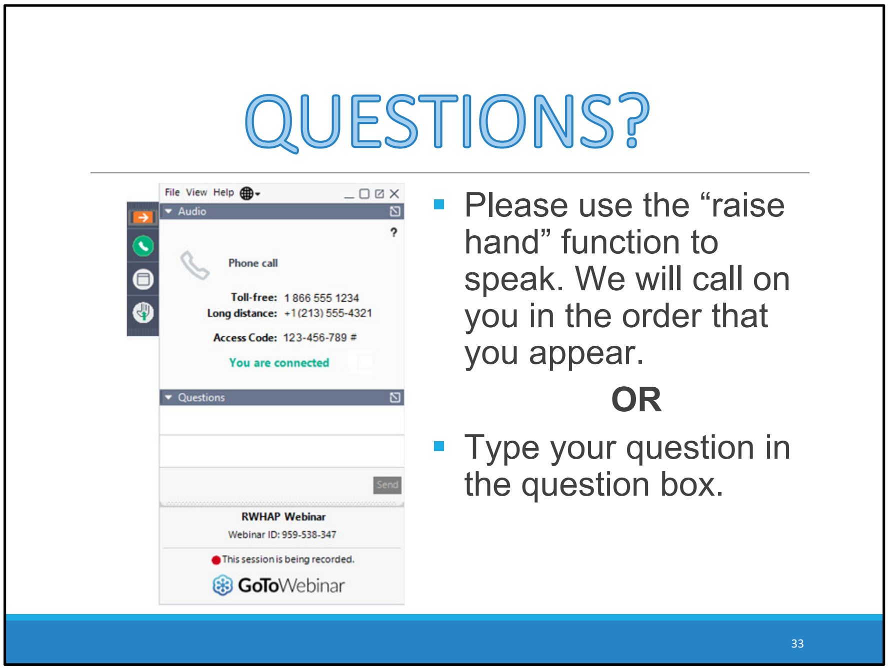
In addition, the TargetHIV website has a wealth of materials and links related to the Ryan White HIV/AIDS Program, including both the PTR and GCMS Instruction Manuals, with links shown here.

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

I’d like to take a moment to 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.



Thank you James

We will now take questions. As a reminder, you can send us questions using the “Question” function on your control panel, located on the right-hand side of the screen. You can also ask questions “live.” You can do this by clicking the raise hand button (on your control panel). If you are using a headset or computer with a microphone, my colleague, Brian, will conference you in; or, you can click the telephone button and you will see a dial-in number and code. We hope you consider asking questions “live,” as we really like hearing voices other than our own.

We want to address all your questions and we also want to stay within our 1-hour timeframe. If you submit a question in the question box and we don’t have a chance to respond today, we will contact you to follow up. We may need to research your question to give you the best response.

As you exit this webcast, please take a moment to complete the evaluation question that appears on your screen. We would appreciate your feedback. It will help us understand how we did and identify information that should be included in future webcasts. Thank you for joining us today!