



An Overview of Health Resources & Services Administration's (HRSA'S) Electronic Handbooks (EHBs) for Recipients

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

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A project of  CAI in partnership with  and  MISSION ANALYTICS

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Welcome to the webcast about using the Electronic Handbooks or EHBs for RSR reporting. This webinar will introduce the Electronic Handbooks (EHBs) and is intended for direct recipients of Ryan White funding.

Today's Webinar is Presented by:



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

AGENDA

- Learning Objectives
- EHBs Overview
- New User Registration
- Grant Level Registration
- Accessing the Ryan White Services Report (RSR)
- Resources
- Questions



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During today's webinar we will cover:

Learning Objectives,

Provide an EHBs Overview,

Discuss New User Registration and Grant Level Registration.

We will then review the steps for accessing the RSR, provide available resources, and take any questions you have.

LEARNING OBJECTIVES

Participants will be able to:

- Understand the EHBs and the information contained within
- Understand the roles within EHBs needed to access the RSR
- Validate account as Project Director or request access needed to access the RSR



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

1. Understand the EHBs and the information contained within
2. Understand the roles needed in the EHBs to allow them access to the RSR
3. And either validate their EHBs account as a Project Director or request the privileges needed for them to access the RSR

WHAT ARE THE EHBs?

- The HRSA Electronic Handbooks (EHBs) is the grants and program management system used by HRSA and its recipients
- Available on the internet – <https://grants.hrsa.gov> (use the “applicant/grantee” option)
- Allow authorized individuals within an organization to view, edit, or submit grant-related information electronically
- Facilitate HRSA monitoring and oversight of programs



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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 HRSA’s monitoring and oversight of programs.

RECIPIENT TASKS AND ACTIVITIES AVAILABLE IN EHBs

- Submission of grant-related requirements
 - Conditions of Award
 - Reporting Requirements
 - [RSR](#) (Ryan White Services Report)
 - [ADR](#) (ADAP Data Report)
 - Noncompeting Continuation Progress Reports
- Grant Change Requests (a type of Prior Approval request)
- Management of contact information and authorized users



Here are some Recipient tasks and activities that are available in the EHBs:

Recipients use the EHBs to submit grant-related requirements such as Conditions of Award, Reporting Requirements (like the RSR and ADR), and Noncompeting Continuation Progress Reports. They can also submit Grant Change Requests, which is a type of Prior Approval request, and Manage grant contact information and user access and privileges.

RECIPIENT TASKS AND ACTIVITIES NOT AVAILABLE IN THE EHBs

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



Some recipient tasks and activities that are NOT available in the EHBs are: competing application submissions, draw down of federal funds, submission of quarterly federal financial reports – FFRs – to PMS, or changes to organization information. For those items, please go to the location listed in the chart.

EHBs AND THE RSR

- Recipients, including those who are also providers should use the EHBs to access their RSR Report(s).
- **New for 2020 RSR**
 - Provider Only Organizations will access the RSR through the EHBs
 - This change will be implemented in Fall 2020
 - Be in the lookout for further information



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

In a new update for the 2020 RSR, provider ***only*** organizations will also access the RSR through the EHBs. This differs from previous years' processes so please be on the lookout for further information from HAB.

EHBs SYSTEM REQUIREMENTS – TEST YOUR SETTINGS

The screenshot shows the EHBs login page. On the left, there are sections for 'Existing Users' (with Username and Password fields, a Login button, and a Forgot Password? link), 'New Users' (with a Create an Account button and a Click here to get started link), and 'Contact Us' (with contact information for HRSA). On the right, there is a 'What's New' section with two news items and a 'View All' link. At the bottom right, there is a 'Learn About' section with links for Grant Program, Free Clinic Program, and FQHC-LAL Program, and an 'Other Links' section with links for Browser Requirements, Funding Opportunities, Track Grant Application, and Help. The 'Browser Requirements' link is highlighted with a red box.



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Now, let's take a look at how to make sure your browser is set up to allow you to experience the full functionality of the EHBs.

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

Click this link to verify that your computer's settings meet the EHBs requirements. When you click this link, a very quick test will be done, just a few seconds, don't worry and 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 or not 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. Some of the Browser Requirements include having Internet Explorer 8.0 or greater, and allowing pop-ups.

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

EHBs REGISTRATION

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



The screenshot displays the HRSA EHBs registration interface. It is divided into two main sections: 'Existing Users' and 'New Users'. The 'Existing Users' section includes input fields for 'Username (Email)' and 'Password', a 'Login' button, and a 'Forgot Password?' link. The 'New Users' section features a 'Create an Account' button, which is highlighted with a red border, and a link that says 'Click here to get started' with an external link icon.



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

All members of the recipient organization who are responsible for viewing, editing or submitting grant-related information *must* register in the HRSA EHBs.

If you have previously created an EHBs account, you do not have to register again.

If you are not sure if you have previously registered, Click the “Create an Account” button on the login screen, shown here, outlined in red.

NEW USER REGISTRATION SCREEN (Part 1)

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

You are here:

Registration - Have an EHBs Account?

I have never had an account.

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

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

I have an account and...

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

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

I have an account, but...

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

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

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



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

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

NEW USER REGISTRATION SCREEN (Part 2)

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

You are here:

Registration - Have an EHBs Account?

I have never had an account.

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

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

I have an account and...

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

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

I have an account, but...

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

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

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



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

NEW USER REGISTRATION SCREEN (Part 3)

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

You are here:

Registration - Have an EHBS Account?

I have never had an account.

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

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

I have an account and...

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

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

I have an account, but...

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

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

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



Use one of the additional options only if one of those specific scenarios applies to you. Most of you here will probably benefit from using the first option I mentioned– the “I am Not Sure! Check if I have an account” option.

FORGOT PASSWORD?

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

You are here:

Registration - Have an EHBs Account?

I have never had an account.

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

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

I have an account and...

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

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

I have an account, but...

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

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

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



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

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

REGISTRATION STEP 1: CREATE AN ACCOUNT

- Complete registration form with your information

You are here: Home > New User Registration

User Account - Create

Registration Status

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

Fields with * are required

User Information

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

Contact Information

- * Email Address (username@domain.com)
- * Phone Number - Ext.
- Fax Number



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

Registration is a 3-step process.

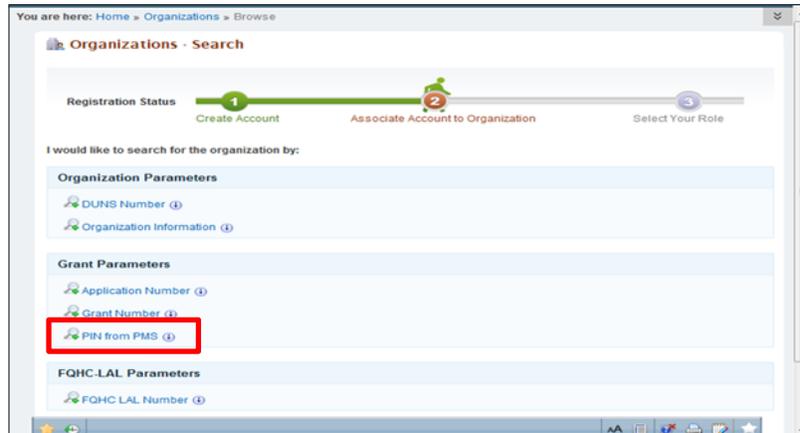
Step 1 is to create an account by filling out the fields in the forms shown on the screen.

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

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

STEP 2: ASSOCIATE ACCOUNT TO ORGANIZATION

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



The screenshot shows a web interface for "Organizations - Search". At the top, there is a breadcrumb trail: "You are here: Home > Organizations > Browse". Below this is a progress bar with three steps: "1 Create Account", "2 Associate Account to Organization" (which is highlighted with a red circle), and "3 Select Your Role". The main content area is titled "I would like to search for the organization by:" and contains several search categories, each with a magnifying glass icon and a help link:

- Organization Parameters**
 - DUNS Number (i)
 - Organization Information (i)
- Grant Parameters**
 - Application Number (i)
 - Grant Number (i)
 - PIN from PMS (i)** (This option is highlighted with a red rectangle)
- FQHC-LAL Parameters**
 - FQHC LAL Number (i)

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

Step 2 is to associate this account to your organization.

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

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

STEP 2: ORGANIZATIONS LIST

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

The screenshot displays the 'Organizations - List' page in the HRSA system. At the top, there is a 'Notes(s)' section and a 'Registration Status' progress bar with three steps: 'Create Account', 'Associate Account to Organization', and 'Send Your Note'. Below this is a search bar with the criteria 'Organization Name like: University of Maryland'. The search results are shown in a table with the following columns: Organization Name, City, State, CERS ID#, DUNS, and Options. The first row of results is highlighted with a red box around the side arrow icon in the 'Options' column.

Organization Name	City	State	CERS ID#	DUNS	Options
UNIVERSITY OF		MD		1	Register
UNIVERSITY OF		MD		7	Register
UNIVERSITY OF		MD		6	Register
UNIVERSITY OF		MD		1	Register
UNIVERSITY OF		MD		1	Register



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

STEP 2: ORGANIZATIONS LIST (Cont.)

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

You are here: Home » Organizations » Browse

Organizations - List

Note(s):
You cannot create new organization records in EHRs. If your organization is an existing HRSA grantee, its record already exists. If you have submitted an application in Grants.gov and have received notification from HRSA, your organization record should already exist. If you cannot find your organization, you will need to create it in CCR/SAM (2) and then import it into EHRs. If you have questions, reach HRSA Contact Center.

Registration Status: 1 Create Account → 2 Associate Account to Organization → 3 Select Your Role

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

Search Criteria: Organization Name like: University of Maryland

Page size: 15 Go

Organization Name	City	State	CRS-EN	DUNS	Options
UNIVERSITY		MD			Register

Registered AD: Grants Funded: Location Address: 2 Other Programs: Not Available

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

STEP 3: CHOOSE YOUR ORGANIZATION ROLE

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

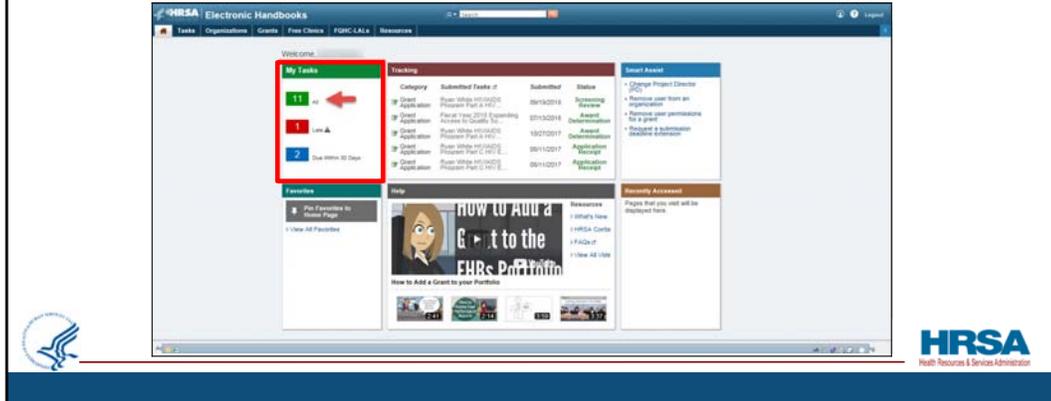
The screenshot shows a registration progress bar at the top with three steps: 1. Create Account, 2. Associate Account to Organization, and 3. Select Your Role. Below the progress bar, it displays the user's name: "You are registering as: Jillian Gregory (jgregory@)". Below that, it shows the organization: "You are registering to: UNIVERSITY". A note indicates "Fields with * are required". The main section is titled "Choose a role from the following that best describes your participation in the HRSA grants management process". Under the heading "Role", there are three radio button options: "Authorizing Official (AO)", "Business Official (BO)", and "Other Employee (Project Director, AO Designee, Staff)". Below this, there is a checkbox for "Financial Grant Reporting" with the text "I am also responsible for Approving/Submitting the Financial Grant Reports" and a note: "Note: Only Authorizing Official (AO) or Business official (BO) can be responsible for Financial Grant Reporting." At the bottom of the form, there are "Go Back" and "Save and Continue" buttons. The HRSA logo is visible in the bottom right corner of the slide.

Next, choose your role within the organization – that is -- your role at the *Organization Level*. Your organization role can be changed later, if necessary. Most users are “Other Employees” and should select that option when selecting their role. Please note that the role selected here does not determine your access to the RSR specifically. *That* access will be addressed in the next few slides.

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

EHBs HOME PAGE

- When you first log in to the EHBs, you will not have access to organization information or tasks assigned as shown, until account is validated by Adding Grant to Portfolio

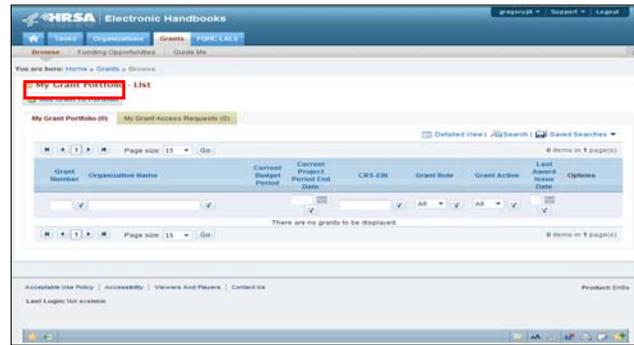


This is a screen shot of the EHBs landing page, or home page, the screen you see when you first log in each time. The very first time you log in to the EHBs, you will not have access to organization information, and you will not until your account is *validated* by Adding your Grant to your Portfolio, which we will discuss next. So, until that is done, when you log in, you will see you have no tasks assigned to you.

Note: This page was re-designed in 2017. A Help section, Smart Assist section, and Favorites section are now 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.



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

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 with red outline. That will allow you to search for the grant and add it to your portfolio so that it will show on this screen going forward.

EHBs ROLES-GRANT LEVEL

- In the context of the RSR, you are either the Project Director or Other
- **Register as Project Director**
 - There is only one project director allowed for each grant
 - Name must match name listed on the most recent Notice of Award (NoA)
 - Need CRSEIN and Award Issue Date to Register
 - Will have access to all non-financial reports once validated
 - Manage access and privileges for other users
- **Request Access (everyone else)**
 - Any other members of the organization who will need to view, edit or submit the RSR to HRSA should choose this option



Before we look at the “Add Grant to Portfolio” screen, let’s look at the EHBs’ roles at the Grant level.

In the context of the RSR, you are either the Project Director or Other Employee.

Here’s what you need to know about Registering as the Project Director:

There is only one project director allowed for each grant

The name must match the name listed on the most recent Notice of Award (NoA)

You need the CRSEIN and Award Issue Date to Register

Once validated, you will have access to all non-financial reports

You will be automatically authorized to Manage grant access and privileges for other users

The Request Access option is for Everyone Else who is NOT a project director.

So, any other members of the organization who will need to view, edit or submit the RSR to HRSA should choose this option

ADD GRANT TO PORTFOLIO

- Select your role for the grant



The screenshot shows the HRSA Electronic Handbooks interface. The top navigation bar includes the HRSA logo, the title 'Electronic Handbooks', a search bar, and a 'Logout' link. Below the navigation bar are tabs for 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FQHC-LALs', and 'Resources'. The 'Grants' tab is active. The breadcrumb trail reads 'You are here: Home » Grants » Browse'. The main content area is titled 'Add Grant To Portfolio' and contains a section for 'Select Registration Option'. This section includes three radio button options: 'Register as Project Director (PD) - I am a project director for a grant', 'Register as Financial Reporting Administrator (FRA) - I am the official responsible for approving/submitted Financial Grant Reporting for my organization.', and 'Request Grant Access - I support grant reporting: Progress Reports, Performance Reports, Financial Reports, Noncompeting Applications and others.'. At the bottom of the form are two buttons: 'Return To Portfolio' and 'Continue'.



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. Remember that most of you will either use the first option, Project Director, or third option, Request Grant Access.

GRANT LEVEL PRIVILEGES - RSR

- The RSR is a Performance Report. You will need Performance Report privileges to access the RSR. The Project Director will automatically have privileges to the RSR once the grant has been added to the portfolio, everyone else will need to be given privileges by the Project Director or other user with “Administer Grant Users” privileges for the Grant.

Grant Access - Request

Note(s):
Your request to access the following grant(s) will be approved by the respective grant Project Director (PD). The Financial Reporting access request will be approved by the Financial Reporting Administrator (FRA)

Grant Group (1)

Fields with * are required

Enter Your Comments

Approximately 1 page (Max 2000 Characters without spaces) 2000 Characters left.

Comments

Financial Privileges (will be approved by grant FRA)

- Submit Financial Reports
- Create/Edit Financial Reports
- View Financial Reports
- Administer Financial Reports

Other Grant Privileges (will be approved by grant PD)

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

Notification

Notify Project Director/Financial Reporting Administrator of your request to add this grant to your portfolio.

[Return to List](#) [Request Access](#)

The RSR is a Performance Report.

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

The Project Director will automatically have privileges to the RSR once the grant has been added to the portfolio. Everyone else will need to be *given* privileges, either by the Project Director or another user who has the “Administer Grant Users” privilege for the Grant.

This screen shot shows the “Administer” column and how the checkbox can either be checked or not checked to allow this privilege . If it is checked, that person has privileges and can give others privileges as well. If it is not checked, that person cannot make adjustments to the privileges of other users.

GRANT LEVEL PRIVILEGES – ADMINISTER GRANT USERS

- The Project Director should approve “Administer Grant User” privilege for at least one delegate to approve privileges for other users. Anyone with Administer Grant User privileges for a grant can approve and manage user privileges.
- How to Change your Project Director: <https://youtu.be/JbVw4VvDHps?list=PLEF93841BAEF1FE28>
- Contact the HRSA EHBs Customer Support Center at 1-877-464-4772

Grant	View	Create / Edit	Submit	Administer	Access
Grant					<input type="checkbox"/>
Grant Users				<input type="checkbox"/>	
Awards	<input type="checkbox"/>				
Requests					
Prior Approval Request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submissions					
Financial Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Performance Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Progress Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Noncompeting Continuations Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Other Submissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Cancel Approve



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

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

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

The project director is listed on the Notice of Award. Any change to the project director needs to be noted on the Notice of Award. The organization may submit a prior approval request in the EHBs to make this request. You can learn how to do this on the link displayed or contact the EHBs Customer Support Center at 1-877-464-4772.

VERIFY YOUR PRIVILEGES

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

The screenshot shows the HRSA Electronic Handbooks interface. The top navigation bar includes 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FQHC-LALs', and 'Resources'. The main content area is titled 'My Grant Portfolio - List' and contains a table with the following columns: Grant Number, Organization Name, Current Budget Period, Current Project Period End Date, CRS-EIN, Grant Role, Grant Active, Last Award Issue Date, and Options. Two rows of grant data are visible. The 'Options' column for the second row has a dropdown menu open, showing a list of actions including 'Request Prior Approval', 'Request New HSO Health Center CIS', 'Request Privilege', 'Manage Users', 'Manage Services', 'Manage Sites', and 'Manage Other Activities & Locations'. The 'Privileges of' option is highlighted with a red border.

Grant Number	Organization Name	Current Budget Period	Current Project Period End Date	CRS-EIN	Grant Role	Grant Active	Last Award Issue Date	Options
		03/01/2017-02/28/2018	02/28/2019		PD	Yes		Action
		09/01/2017-09/31/2018	09/31/2018		Other	Yes		Privileges of



To verify that you have the privileges to access the RSR, check to see if you have privileges for performance reports for the grant. To do that, select the Grants tab, find the “Option” column located on the far right side of the row, and select the “Privileges” option from the resulting drop down menu for that grant. The “Privileges” option is shown here with red outline.

TASKS TAB OVERVIEW

- Pending tasks will appear in the tasks tab based on your privileges
 - Reports/requirements that have not been submitted
 - Prior approval requests that have been started, but not submitted
 - Change Requests
 - Requests for access (if applicable)
- Use the left side menu to access additional features



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Before we go into accessing the Ryan White Services Report, let's do a quick overview about tasks and the tasks tab. Remember before you registered, you saw zero tasks. Now that you're registered, that will likely not be the case!

Pending tasks will appear in the tasks tab based on your privileges

Pending tasks include:

Reports/requirements that have not been submitted

Prior approval requests that have been started, but not submitted

Change Requests

Requests for access (if you are a PD or someone with permissions to approve access requests)

You may use the left side menu to access additional features. We will take a look at this in a few slides.

TASKS TAB OVERVIEW (Cont.)

- Pending tasks will appear in the Tasks Tab based on your privileges

The screenshot shows the HRSA Electronic Handbooks interface. At the top, there is a navigation bar with the HRSA logo and the text "Electronic Handbooks". Below this is a search bar and a menu bar with options: Home, Tasks (highlighted with a red box), Organizations, Grants, Free Clinics, FQHC-LALs, and Resources. The main content area is divided into two sections: "My Tasks" and "Tracking".

My Tasks

1	All
0	Late
0	Due Within 30 Days

Tracking

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



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

Note also the Tasks you submitted under the Tracking section.

GRANTS TAB OVERVIEW

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

Reminder, the Federal Funding Accountability and Transparency Act (FFATA) requires all recipients to report information for e you need assistance, please send a message to hrsapostwards@hrsa.gov

Welcome, Francois Micciche

My Tasks

- 4 All
- 0 Late
- 1 Due Within 30 Days

Tracking

Category	Submitted Tasks [⌵]	Submitted	Status
<input checked="" type="checkbox"/> Other Submissions	RWHAP Expenditure Report - RWHAP Expenditure Report	06/24/2019	Processed
<input checked="" type="checkbox"/> Other Submissions	FY 2019 Allocation Report	06/06/2019	Under Review
<input checked="" type="checkbox"/> Other Submissions	FY 2019 Allocation Report	06/06/2019	.
<input checked="" type="checkbox"/> Other Submissions	Maintenance of Effort	05/30/2019	Processed
<input checked="" type="checkbox"/> Financial Report	Single Federal Financial Report	04/17/2019	Processed



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

GRANTS TAB OVERVIEW (Cont.)

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



One example would be the Performance Report, which is accessible from the Grants Tab, under the Submissions section.

This is where the RSR is located.

PERFORMANCE REPORTS

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

The screenshot displays the 'Submissions - All' interface. At the top, there are tabs for 'Not Completed', 'Recently Completed', and 'All'. Below this is a 'Search Filters' section. Under 'Basic Search Parameters', there are input fields for 'Grant Number (comma separated list)', 'Submission Name Like', 'Submission Tracking Number Like', and 'Submission Deadline (mm/dd/yyyy)'. There are also 'Between' and 'And' operators. The 'Organization' section has checkboxes for 'All', 'HANDSHAW ROUTER HOSPITAL', and 'Other Submissions'. The 'Submission Type' section has checkboxes for 'Performance Reports' (checked) and 'Progress Report'. Below the search filters is a section for 'Advanced Search Parameters' which is highlighted with a red box. At the bottom, there are 'Display Options' and a 'Sort Method (Grid | Custom)' dropdown. A 'Search Name' field and 'Save Parameters' and 'Search' buttons are located at the bottom right.



The Submissions-All page will appear.

Before searching by parameters such as Grant Number or Submission Name, it is recommended you UNcheck the “All” box in the Organization area. Doing this, and checking the Performance Reports box, will yield quicker and more efficient results.

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

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.



Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
Final Report	Performance Reports			BPMFRT0800046295	07/01/2016 - 06/30/2020	09/30/2020		In Progress	Edit
Annual Performance Report	Performance Reports			BPMAPRT0800044681	07/01/2019 - 06/30/2020	07/31/2020	07/20/2020	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800042347	07/01/2018 - 06/30/2019	07/31/2019	07/29/2019	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800039794	07/01/2017 - 06/30/2018	07/31/2018	08/16/2018	Submitted	Performance Reports
Annual Performance Report	Performance Reports			BPMAPRT0800036867	07/01/2016 - 06/30/2017	07/31/2017	07/26/2017	Submitted	Performance Reports



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

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

ACCESSING THE RSR

- Once you have privileges to view, edit, or submit performance reports (RSR), you will access it through the Tasks Tab
- You will not see the RSR in the Tasks tab if:
 - It has already been submitted
 - You do not have privileges for performance reports for the grant



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Now let's talk about accessing the RSR.

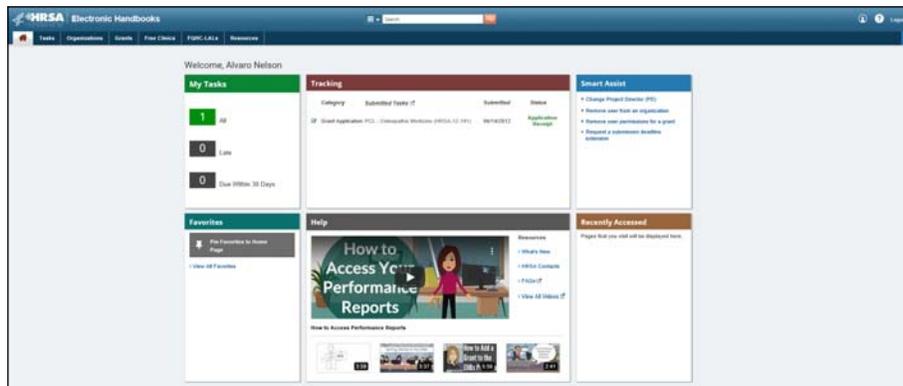
Once you have privileges to view, edit, or submit performance reports, like the RSR, you will normally access it *through* the Tasks Tab.

You will *not* see the RSR in the Tasks tab if:

It has already been submitted or if you do not have privileges for performance reports for the grant.

LOGGING INTO THE EHBs

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



In this screen shot, we are back on the EHBs landing page, or “Home” page. Now that you have added the grant to your portfolio and have been given privileges to access grant related information, tasks will appear in the “My Tasks” section. The “Recently Accessed” section, is available for easy navigation to recently accessed items.

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

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

PENDING TASKS

- Use search and filter options at the top of the page for easy navigation. The RSR will appear as a “Performance Report” and show the deadline date.
- Click the “Submissions” link in the left side menu for more search and filter options.

The screenshot displays the HRSA Pending Tasks interface. On the left, a navigation menu includes 'Submissions', which is highlighted with a red box. The main area shows a table of pending tasks. At the top of the table, search and filter options are highlighted with a red box. The table has the following columns: Deadline (Due), Task Category, Tracking #, Task, Entity, Organization, and Options. A single task is listed with a deadline of 09/30/2020 at 11:59 PM (54 Days), categorized as Grant Submissions, with tracking number BPMFRT000046295, task name Performance Reports, entity TSB#P10192 (Grant), and organization Osteopathic Medicine, West Virginia School of.



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” due on **9/30/2020**. Click the “Submissions” link in the left side menu, shown here outlined in red, for more search and filter options.

SUBMISSIONS SECTION

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

Not Completed Recently Completed All

Export To Excel Detailed View Search Saved Searches

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

Due In	Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Status	Options
54 Days	Final Report	Performance Reports	CUBLEY ABBOTTS HOSPITAL, WV	T08-IP00729	BPMFRT0800046295	07/01/2016 - 06/30/2020	09/30/2020	In Progress	Edit
84 Days	Financial Report	Financial Report	CUBLEY ABBOTTS HOSPITAL, WV	T08-IP00729	FFR001014001	07/01/2019 - 06/30/2020	10/30/2020	In Progress	Financial Report

Due: In more than 30 Days (2)

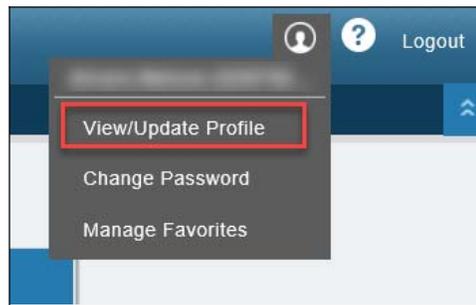
Page size: 15 Go 2 items in 1 page(s)



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

UPDATING CONTACT INFORMATION

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



And now that you have already registered, let's look at how you can verify or change the email address or any other information associated to your account.

If any of your contact information changes, you must update your profile

Click the "View/Update Profile" link in the top right corner of the page, outlined here in red, to view or update your information.

VIEW/UPDATE PROFILE PAGE

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

The screenshot displays the 'View/Update Profile' page in the HRSA Electronic Handbooks system. The page is titled 'View/Update Profile' and includes a note that 'Fields with * are required'. The form is organized into two main sections: 'User Information' and 'Contact Information'. The 'User Information' section contains fields for User Name (SBirch_ext), Title (Director), Salutation, First Name (Jillan), Middle Initial (G), Last Name (Gregory), Generation Qualifier, Highest Degree (MPH, MSN, FNP), Department (HRSA), and School. The 'Contact Information' section includes an Email Address field (rlaxter1@hotmail.com). The page also features a navigation menu at the top with options like 'Tasks', 'Organizations', 'Grants', and 'FAQs', and a user profile dropdown in the top right corner.



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.

CHATBOT - Sarah

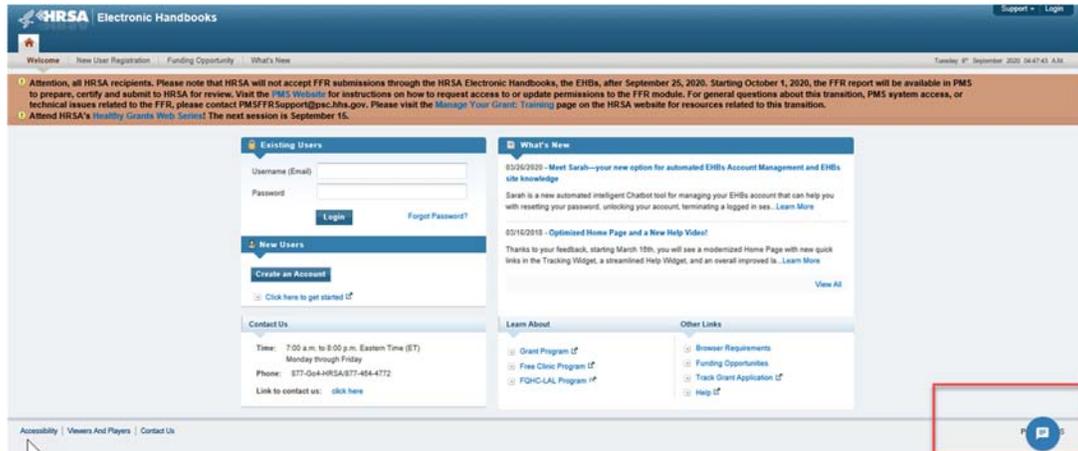
- **CHATBOT** – The Chatbot, “Sarah” provides basic account management support, helpdesk ticket creation, and informational support. One of Sarah’s strategic goals is to provide an enhanced self-service component to the user.



Let’s review some available resources.

In March 2020 HRSA launched a Chatbot to help grantees. With this additional “self-help” resource now available, there are a number of ways you will be able to manage your grant without needing to call in to the EHBs Customer Support Center as your primary option when you need assistance.

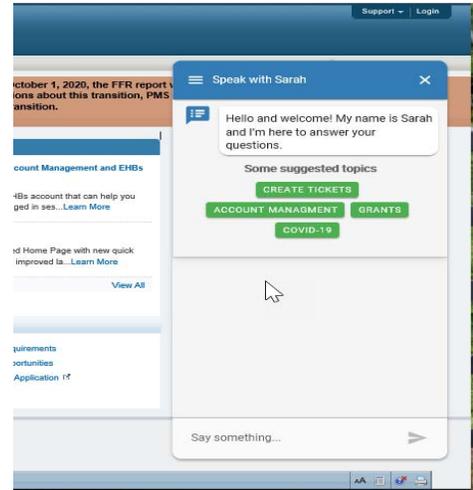
CHATBOT – Where’s Sarah?



When you get to the EHBs login page, the Chatbot ‘Sarah’ is located in the bottom right corner. Simple click on the icon and start using the Chatbot.

Sarah can help you

- How can Sarah assist you?
 - Account Management
 - Grants Information
 - COVID-19 Information
 - Reset Passwords
 - Terminate/Unlock Accounts

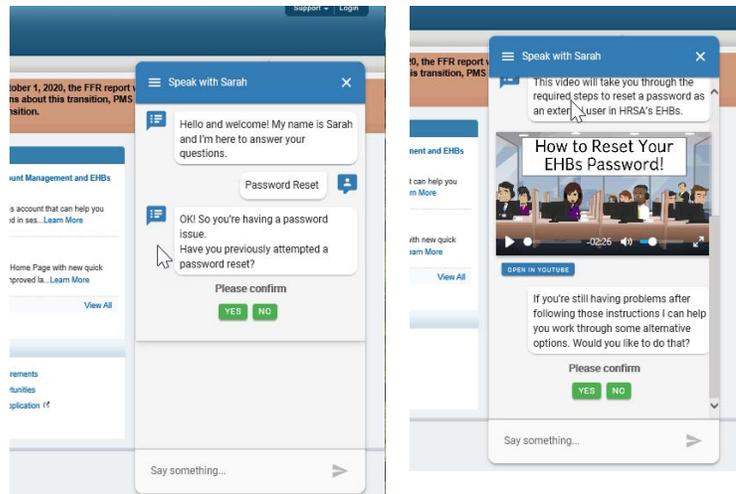


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The CHATBOT can help users with things like account management, grants information, Covid-19 information. as well as resetting passwords or terminating/unlocking accounts.

CHATBOT Example

➤ Get Help
Resetting
your
password



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These are just a couple of visual images that display what happens when you use the Chatbot. For example, you can ask Sarah to help with a password reset. There are a number of videos that walk you through the steps and lead you through what you need to do.

GENERAL RESOURCES

- **EHBs Help and Knowledge Base**

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

- **HRSA Tube – EHBs Videos**

- <http://www.youtube.com/hrsatube>

- <https://www.youtube.com/playlist?list=PL5Q6ZzhASkeQhvmHi46nr8nWnzds4epG>



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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 some videos to help you navigate the EHBs available at youtube.com/hrsatube.

TA RESOURCES

- **HAB Web Site**

- Policy notices, instructions, and HAB information
<http://hab.hrsa.gov>

- **TargetHIV**

- Training materials, manuals, and submission timeline
<https://targethiv.org>
- 2019 RSR Instruction Manual: <https://targethiv.org/library/rsr-instruction-manual>



Here are some helpful resources to consult when reporting. The HAB website is the place to find policy notices and instructions, as well as other general information concerning the Ryan White program.

On the TargetHIV web site you can find the 2019 submission timeline, the listserv, past webinars, the 2019 RSR Instruction manual, and a wealth of other materials related to the RSR.

TA CONTACT INFORMATION

- **Ryan White Data Support**

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

- **The DISQ Team**

- Data.TA@caiglobal.org

- **EHBs Customer Support Center**

- 877-464-4772

- Hours: 8:00 AM – 8:00 PM ET (M-F)

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



- **CAREWare Helpdesk**

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

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



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Here are the additional Technical Assistance resources available to you throughout the year should you require further assistance. The Data Support team addresses RSR-related content and submission questions, including interpretation of the RSR Instruction Manual and HAB's reporting requirements, step-by-step instructions for completing the RSR Recipient and Provider Reports, data validation questions, and any general questions about the RSR. The DISQ team addresses questions for those needing significant assistance to meet data reporting requirements including helping determine if recipient systems currently collect required data, assisting recipients in extracting data from their systems and reporting it using the required XML schema, and connecting recipients to others that use the same data systems to provide assistance. DISQ also deals with data-quality issues and provides technical assistance for the TRAX Application.

The EHBs Customer Support Center addresses RSR software-related questions such as registering for and navigating the EHBs and RSR Web System, resetting passwords, and making sure that you have the right permissions to complete the reports. They are available 8am – 8pm Eastern Time, Monday Through Friday. You can reach them by phone at 1-877-464-4772 or by using the Contact Us form available at the URL provided

For CAREWare users, the CAREWare Help desk is the best resource for all CAREWare - related questions. CAREWare users should sign up for the listserv on the HAB website to join the conversation with their peers.

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



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