EHBs: Instructions for Performance Reports

This document includes the following sections:

A. Register as a New User

1. Go to https://grants.hrsa.gov/webexternal.

2. Click on the "Registration" link in the left hand menu bar.

   A table will appear with the following header: Step 1 of 2: Create User Account.

3. Enter your first name and last name in the appropriate fields.

4. In the Username field, enter a user name that you define.

   Your user name must be between 6 and 20 characters. You may not include spaces in your user name. The user name is not case sensitive. Once established, the user name may not be changed.

5. In the password field, enter a password that you define.

   Your password must be between 8 and 20 characters, and must include:
   - At least one lower-case letter
   - At least one upper-case letter
   - At least one number
   - At least one special character (e.g., ~, !, #, *)

   Here are some examples of acceptable passwords:

   LJohnson1!
   ChildHealth2005#
   Topeka&2005

6. Select a Security Question from the drop down list.

   This is the question that you will be asked to answer if you lose your password and need to request that it be reset.

7. Enter the answer to your security question in the appropriate field.

   This is the answer that you will need to provide to verify your identity in the event that you lose your password and request a password reset.

8. In the Contact Address section, enter your email address and phone number (required) and fax number (optional).

9. The next section is Physical Location Address. You are not required to complete this section (it is optional), but if you complete any field in this section, then all of the required fields in the section (noted with a red asterisk) must be completed.

10. The next section is Mailing Address. You are not required to complete this section (it is optional), but if you complete any field in this section, then all of the required fields in the section (noted with a red asterisk) must be completed.

    The next section is "**Registering Role and Organization**." Accurate completion of this section is very important, because the role you select dictates what you can do in the system, and the grant number you enter will identify your organization in the grants database.

11. Identify your role within the organization by clicking on the circle (radio button) next to the appropriate role.

    - If you are responsible for conducting final review of grant applications and signing them on behalf of your organization for submission to HRSA, then you should select "Authorizing Official" as your role.

    - If you are primarily responsible for preparing and submitting financial progress reports, and interacting with the payment management system, select "Business Official" as your role.

    - If you are a project director or staff member who does not have either of the additional duties described above, select "Other Employee" as your role.

12. In the Grant Number field, enter your 10-digit grant number from an NGA belonging to your grant. Entering your grant number here will expedite your registration process. ***NOTE: This step is very IMPORTANT: Use the grant number associated with the current grant as it appears on your NGA.***

13. When you have finished this page, click on "Save and Continue."

14. A confirmation page will appear. A table will appear with the following header: Step 1 of 2: Confirm User Account Creation. Review the information. If you want to make changes, click on the Edit button, and you will go back to the registration page. If the information is correct, click on Register.

    At this point, you will begin the important second step of registration: "Associating" yourself with your organization.

15. You will be presented with a page that displays information associated with the grant number you entered. Simply click on the "Add me to this Organization" button.

    NOTE: If you notice any errors in the organization information displayed, please click on "Add me to this Organization" anyway. After registration, you may request an update/correction to the organization information by contacting the HRSA Call Center at 877-Go4-HRSA.

16. On the "**Confirm Addition of Account to an Organization"** page, click "Continue" to confirm your registration with this organization.

    A page will display your registration results.

17. Now click on "Log into HRSA."

18. You will be presented with the system "Rules of Behavior" and "Intrusion Detection" warnings. You must acknowledge and accept these terms of use to continue. Review the information, and click on the "Accept" button.

You are now ready to begin working on your performance report!

If you wish to begin work on your performance report right now, continue with Section B. If you want to come back and work on it later, click the Logout button located below the left hand navigation bar. When you are ready to start your performance report, go to https://grants.hrsa.gov/webexternal, click Login and enter the username and password that you just established, and then follow the steps in Section B.

B. Add Grant to Portfolio: Selecting Role

NOTE: To successfully access your grant and begin a performance report, you will need a copy of your Notice of Grant Award (NGA). Please make sure that you have your NGA readily available for reference as you complete the next steps.

Specifically, you will need the following information from the NGA:

- Issue Date (Item 1 on the NGA)
- Project Director Name as shown on the NGA.
- CRS-EIN Number (Item 18 on the NGA)

Each registrant in the HRSA electronic handbooks has a “grant portfolio.” This “grant portfolio” will allow you to select, identify and work on multiple grants. In order to begin a performance report, the first thing you need to do is to add the grant to your “portfolio” so that you can work on it. The steps below describe how to do this.

Once a grant has been awarded, only the project director whose name appears on the NGA has the authority to give other organization staff access to the grant.

If you are the project director, you can continue with the steps listed below.

If you are another member of the organization staff, but are not the person who is listed as the project director on the NGA, we recommend that you identify that individual and ask him or her to register in the system. Instructions in Section D will explain how to “request” access to the grant. That request will be sent to your project director, once he or she is registered in the system.

1. Find the navigation bar on the left-hand side of the screen.

2. Under the header “Grants Portfolio,” click on the option, “Add to Portfolio.”

   The “Add to Portfolio” instructions screen will appear. These instructions are important. ***Please read them. In fact, we recommend that you print them, and keep them readily available for reference.***

   NOTE: In order for any individual within an organization to work on a performance report, s/he must be granted permission by the project director who is identified on the NGA.

   If you are the project director, as referenced on the NGA, you will be able to begin the performance report, provided your registration information matches the information shown on the NGA. If you are the project director, but the information you provided during registration does not match that listed on the NGA, you will be given an opportunity to correct the information.

   If you are not the project director, in subsequent steps you will be able to ask the project director to grant you access to the grant.

3. After reading the instructions on the “Add to Portfolio” screen, click on the button “Continue to Add to Portfolio.”

   An “Add to Portfolio” page will appear.

4. In the Grant Number field, enter the grant number (as shown on the NGA) associated with the non-competing continuation for which you are applying (e.g., H00-MC-0000).

5. In the functional role field, select either "Project Director" or "Other." Only select Project Director if you are identified as the Project Director on the NGA. The project director identity must match that on the NGA in order for you to be able to continue using this role. Otherwise, select "Other."

   Note*: *If you are the project director of the grant, but your name does not appear on the NGA, you must send a letter to the Grants Management Office with the name of the previous project director, your name as the new project director and the grant number on the NGA. The address for the Grants Management Office can be found in the Terms and Conditions section of the NGA. For further assistance, call the HRSA Call Center at 877-Go4-HRSA (877-464-4772).

6. Click on "Save and Continue."

If you are the Project Director, go to Section C.

If you are "Other," go to Section D.

C. Add Grant to Portfolio: Project Director

This section is for users who selected "Project Director" as a role. In addition, you must be the same individual whose name appears on the NGA as the Project Director for the grant for which you will begin a performance report.

After completing step 6 in Section B above . . .

1. The system will check your registration information to ensure that the information you provided matches that listed for the Project Director on the NGA. If discrepancies are found, you will receive an alert that says:

   "There was an error validating the Project Director Information."

If you see this error message, continue with steps 2 through 9. Otherwise, skip to step 10.

2. Beneath this error message will be a box that says, "Verify Project Director Identity." Here you will have an opportunity to update your profile so that it matches the project director information listed on the NGA.

3. In the Name Validation Status section, compare the information in the two columns:

- Project Director Name on NGA, and
- Project Director Name on Profile.

Review these two entries and identify the discrepancies. Look carefully, sometimes the difference is very small. If the discrepancy is not immediately obvious, check for . . .

- A difference in capitalization
- A difference in spelling
- A difference in spacing
- A different in punctuation
- A difference in Title abbreviations

The entries must match EXACTLY in order for the system to approve the access. Review and identify any differences between the Project Director information on the NGA and the information you used to register.

4. You must now change your user (registration) profile so that your name exactly matches the name shown on the NGA.

   Click on the link, "Update your Profile" located below the Name Validation Status table.

5. Update your name on your profile so that it matches that displayed for the Project Director on the NGA.

6. Click on "Save and Continue."

7. A "Confirmation – Profile Information" page will appear. If the information is correct, click "Save and Continue." If it is not correct, click Edit and update your profile.

8. Once you click "Save and Continue," you will be presented with the Profile Information page with a Note in green stating "Your changes have been successfully updated."

9. Click "Add to Portfolio" under the header "Grants Portfolio." ***Note***: You will have to re-enter your grant number and select your functional role again. Click "Save and Continue."

10. Your status in the "Name Validation Status" section of the "Verify Project Director Identity" table should now be "Validated."

    Once your status is "Validated," your next step is to enter additional information from the NGA.

11. Find the table header row that says "Enter the following information from NGA with grant number [X XXXXXXXXXX-XX-XX]."

12. In the row, "Issue Date," enter the Issue Date of the NGA, in the format "MM/DD/YYYY." Note: This is item 1 on the NGA.

13. In the second row, "CRS-EIN," enter the CRS-EIN shown on the NGA for this grant. ***Note***: This is item 18 on the NGA.

14. In the Certification section, click on the box to certify that you are the Project Director for this grant. To do this, click in the box next to the statement, "I, [your name], certify that I am the project director for grant XXXXXXXXXX."

15. Click on Continue.

    A page will appear indicating whether or not your request to add this grant to your portfolio was successful. A table will be displayed on the page that says, "Addition of Grant to Portfolio – Result." If you successfully added the grant to the portfolio, the Status will be noted as "Registered to Grant."

    Congratulations, you have now successfully added this grant to your portfolio, and are ready to begin work on your performance report or add/approve other users. To begin work on the performance report now, go to Section E. To give access to other staff members within your organization, go to Section H.

D. Add Grant to Portfolio: Staff other than Project Director

If you selected "Other" when you identified your role, you cannot begin the performance report until the project director grants you access.

After completing step 6 in Section B above . . .

1. Next you will be presented with a screen that says, "Request Access from the Project Director." This form allows you to send an email to the Project Director requesting that s/he enter the system and give you access to the grant application.

2. Complete this form, and click on "Continue."

   Using the Project Director contact information associated with the grant NGA, an email will be sent to the Project Director notifying him/her of your request to access the grant.

   NOTE: The Project Director must register in the system in order to be able to give you access to the grant. We recommend that if you are not granted access within a few days, you check with your Project Director to ensure that s/he received the request and understands how to respond. Assistance in registering

and using the system can be obtained by contacting the HRSA Call Center at 877-Go4-HRSA.

3. A page will appear with text that says, "Your request to add the following grant to your portfolio as other staff was successful and has been forwarded to the PD. The Grant will be added to your portfolio once the PD approves your request. You can continue to request access for other grants or proceed to view your portfolio"

4. At this point, you can either Logout, click "Proceed to Another Grant" or "Proceed to View Portfolio."

   If you click "Proceed to Another Grant," you will be able to request to add another grant to your portfolio.

   If you click "Proceed to View Portfolio," a page will appear with the text: "No grants have been added to your portfolio. If you have already made a request, check the status of your request. To check the status of your request, or if you have not previously made a request and would like to see instructions on how to make a request click here." If you click the link "click here," you will be taken to a page that provides information on the status of your request.

E. Start Performance Report After Adding Grant to the Portfolio

Note: This section applies to the Project Director. Upon successful completion of Section C, two buttons will appear on this page: Proceed to Manage Grant and Proceed to View Portfolio. To begin work on this grant now:

1. Click on "Proceed to Manage Grant." You will be taken to the "Grantee Applicant Handbook" page.

2. Click on the "Performance Reports" link, which appears under the header "Deliverables" on the Grant Menu (see left-hand side of screen).

3. The performance report for this grant will appear. Click "Start Report" below the table.

4. The Program Specific Information forms will appear.

F. Start Performance Report After Logging Out of System

If you have logged out of the system and would like to start a performance report, you will first need to login to the system using your username and password.

1. Go to https://grants.hrsa.gov/webexternal.
   A navigation menu appears on the left hand side of the screen.

2. Click on the "Login" link underneath the menu on the left-hand side of the page.

3. Enter your user name in the Username field.

4. Enter your password in the Password field.

5. Click on the Login button.

6. You will automatically go to your Grantee/Applicant Handbook page.

7. Find the menu labeled "Home" on the left-hand side of the page.

8. Underneath the header "Grants Portfolio," click on "View Portfolio."

9. On the next page, your Grants List will appear.

10. Each grant in your portfolio is listed in a table. Next to each grant listing, in the far right column of the table, you will see a hyperlink that says "View/Manage."

11. To work on a specific grant, click on the link that says "View/Manage" next to the grant.

12. Now, the menu on the left-hand side of the screen should say "Grant Menu." This menu is a list of everything you can do with this grant.

13. To work on performance report for this grant, click on "Performance Reports" under "Deliverables" on the Grant Menu

14. The performance report for this grant will appear. Click "Start Report" below the table.

15. The Program Specific Information forms will appear.

G. Edit Performance Report After Logging Out of System

If you have already started a performance report, and want to log back in and work on it some more:

1. Go to https://grants.hrsa.gov/webexternal.
   A navigation menu appears on the left hand side of the screen.

2. Click on the "Login" link underneath the menu on the left-hand side of the page.

3. Enter your user name in the Username field.

4. Enter your password in the Password field.
5. Click on the Login button.
6. You will automatically go to your Grantee/Applicant Handbook page.
7. Find the menu labeled “Home” on the left-hand side of the page.
8. Underneath the header “Grants Portfolio,” click on “View Portfolio.”
9. On the next page, your Grants List will appear.
10. Each grant in your portfolio is listed in a table. Next to each grant listing, in the far right column of the table, you will see a hyperlink that says “View/Manage.”
11. To work on a specific grant, click on the link that says “View/Manage” next to the grant.
12. Now, the menu on the left-hand side of the screen should say “Grant Menu.” This menu is a list of everything you can do with this grant.
13. To work on performance report for this grant, click on “Performance Reports” under “Deliverables” on the Grant Menu
14. The performance report for this grant will appear. Click “Edit Report” below the table.
15. The Program Specific Information forms will appear.

H. Administer New User Requests After Adding Grant to the Portfolio

Note: This section applies to the Project Director. Upon successful completion of adding a grant to your portfolio, you will see a message that says, “[X] other user(s) from your organization have requested permission to add this grant to their portfolios. We suggest that you proceed to **Administer new user requests.**” If this message appears, you can click on the hyperlink “Administer new user requests” to review these requests and grant or deny access to the grant.

1. Click the hyperlink “Administer new user requests.”
2. If new user requests have been made, the names of the new users will appear.
3. You may select either Approve or Disapprove each new user.
    a. If you select Approve, an Approve Request Access to Grant page will appear.

i. Complete the Comments section, and click Continue.

ii. A Confirmation page will appear showing the email that will be sent to the new user. Click Continue.

iii. A results page for Approve Request to Access Grant will be displayed. At this point, you can either click the link "Continue to Manage New User" or the link "Continue to Manage Privileges for This User."

b. If you select Disapprove, a Disapprove Request Access to Grant page will appear.

i. Complete the Comments section, and click Continue.

ii. A Confirmation page will appear showing the email that will be sent to the new user. Click Continue.

iii. A results page for Disapprove Request to Access Grant will be displayed. At this point, you can either click the link "Continue to Manage New Users" or Logout

I. Administer New User Requests After Logging Out of System

Note: This section applies to the Project Director. If you have logged out of the system and would like to administer new user requests, you will first need to login to the system using your username and password. Once you are logged in,

1. In the left-hand navigation bar, click "View Portfolio" under the header Grants Portfolio. (You must have already added the grant to your portfolio.)

2. A Grants List page will be displayed with a list of grants in your portfolio. Click the "View/Manage" link located in the last column of the grant that you would like to administer new users.

3. The grant handbook for your grant will appear. In the left-hand navigation bar, click New User under the header Administer.

4. If new user requests have been made, the names of the new users will appear.

5. You may select either Approve or Disapprove for each new user.

   a. If you select Approve, an Approve Request Access to Grant page will appear.

      i. Complete the Comments section, and click Continue.

      ii. A Confirmation page will appear showing the email that will be sent to the new user. Click Continue.

iii. A results page for Approve Request to Access Grant will be displayed. At this point, you can either click the link “Continue to Manage New User” or the link “Continue to Manage Privileges for This User.”

b. If you select Disapprove, a Disapprove Request Access to Grant page will appear.

i. Complete the Comments section, and click Continue.

ii. A Confirmation page will appear showing the email that will be sent to the new user. Click Continue.

iii. A results page for Disapprove Request to Access Grant will be displayed. At this point, you can either click the link “Continue to Manage New Users” or Logout.

J. Submit the Performance Report

In order to submit your performance report, you must complete all of the MCHB Program Specific Forms. Once you have completed the Program Specific Forms, follow the steps below to submit the performance report:

1. Close the window with the MCHB Program Specific Form, using the “Close” link in the left-hand menu.

2. Return to the EHB Grant Handbook Performance Report.

3. Click the “Submit Report” link. If the “Submit Report” link is not listed below the table, refresh the page and the “Submit Report” link will appear.

   Note: You do not have to submit your performance report once you have completed all of your Program Specific Forms. You may exit the system and return to edit or submit your performance report at a later time. To logout of the system, click “Logout” below the left-hand menu.

4. Once you have clicked “Submit Report,” a new page will appear that indicates your performance report has been successfully submitted.

5. Close this window.

6. You may either logout of the system by clicking “Logout” below the left-hand menu or work on another grant by clicking “Home” at the top of the page under Performance Report.