



# **EHB Version 2.0 Enhancements**

## **Technical Assistance Conference Call Transcript**

7:06 am CT, 02/04/2010

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen in only mode until the question and answer session of today's conference.

At that time you may press star 1 if you'd like to ask a question. Today's conference is being recorded. If you have any objections you may disconnect at this time. I'd like to turn the call over to your speaker. Chris, you may begin.

Chris Suzich: Thank you operator. Welcome everybody and thank you for taking time out of your busy day to join us. We're here to talk about some recent enhancements to EHBs the Electrical Handbooks that were recently deployed into the HRSA electronic grant system.

With me today we are fortunate to have several EHBs experts on the phone. We have myself, I'm Chris Suzich. We have (Darren Buckner), (Kelly Long), Jillian Robey, and (Kumar Anupung).

At the end of this call - at the end of the presentation that Jillian's going to walk us through we'll have plenty of time for any of your questions.

The operator will give you the necessary instructions to ask a question in about 30 minutes when we finish with the PowerPoint presentation.

If you need a copy of the PowerPoint presentation it was emailed. You should have received it via email.

If you need a copy I am going to give you the phone number and email address now that you can call so that you can get a copy of it.

The HRSA Call Center is available and they can send you a copy of the PowerPoint presentation now.

And that phone number is 1-877-464-4772. Email address is [callcenter@hrsa.gov](mailto:callcenter@hrsa.gov). That's H-R-S-A.gov. They can send you a copy of this PowerPoint presentation if you need a copy.

As I said, we are excited about these changes. They will go a long way to making the system more efficient and effective for both you, the grantee user community and for all the external - internal users here at HRSA.

It will get us a step closer to managing your grants paperlessly and as I said, in a more efficient manner.

I do want to say that you don't need to be in front of your computer for this call. You might have the PowerPoint presentation up on your PC. And that is fine of course. Or you could be looking at a hard copy.

Again there'll be plenty of time for questions and answers at the end of this call. We recognize that the PowerPoint presentation is lengthy. It's about 60 pages.

And we are working internally to develop what we call a quick reference guide which will consolidate and summarize the PowerPoint presentation that we will be talking about today into a much smaller document that you'll be able to print and have available for future reference when you are navigating EHBs.

We hope to have that Quick Reference Guide available for you sometime in December. When that is available we will send it out via email and also post it on our Web site.

I'd also like to add that there is no change to the existing FSR, that is the financial status reporting module and procedures that you have been following to date.

Earlier this calendar year you started to submit year FSRs electronically via the Electronic Handbooks. And that's procedure continues, is not affected by the changes that we are talking about today.

You should still enter EHBs to submit your SF269, that is your Financial Status Reports.

With that I'd like to turn it over to Jillian to walk us through our PowerPoint presentation. Jillian?

Jillian Robey: Thank you Chris. Hello everybody. I will be starting with the PowerPoint presentation on Slide Number 2 with the agenda.

Today we'll talk about the purpose and goals, provide an overview of the new features available in the EHBs, provide EHBs notes, and then

go through the specifics for prior approval requests, electronic document submissions, provide you with resources available to help you with this new process and then we'll answer any questions you have.

On Slide 3 we have purpose and goals. The purpose of today's presentation is to provide an overview of the process for submitting grant related documents and change requests electronically through the HRSA Electronic Handbooks or EHB.

We will visually highlight key steps and procedures for using the HRSA EHB system that these documents.

We will communicate the resources available to you, the grantees, and answer any preliminary questions you have.

The goals of today's presentation are to provide technical assistance to grantees and help grantees transition to the new EHBs base process.

On Slide 4 we have information about with EHB's Version 2.0. Grantees now have the ability to electronically submit requests to change grant related information also called prior approval requests and post award submission such as conditions of award or reporting requirements to HRSA through the EHBs.

HRSA will review and approve or disapprove requests through the EHBs. There'll be automated notifications to facilitate review and approval processes.

Slide 5 we have some EHBs notes. The HRSA EHB's is Web based and can be accessed over the Internet using Internet Explorer Version 5.0 and later or Netscape Version 4.72 and later.

Internet Explorer Version 6.0 and above is the recommended browser. The HRSA EHBs use pop-up windows to allow users to view or work in multiple screens.

Please ensure that your browser settings allow pop-ups to the EHBs. In order to completely experience the usability features ensure that JavaScript is enabled on your browser.

On Slide 6 we have prerequisites. And this applies to all users. All members of the grantee organization who are responsible for submitting prior approval requests or other post award submissions must register in the EHBs.

Go to the EHB Web site <https://grants.hrsa.gov/Webexternal/login.asp>. This is the EHB's Web address and this does not change with EHB Version 2.0.

If you have registered before you do not have to register again. You may contact the HRSA Call Center if you do not remember your username or password.

So on Slide 7 now we'll talk about the prior approval requests starting with what is the prior approval request?

The prior approval request is a request initiated by the grantee to change grant related information. In the past these requests were submitted on paper or via email.

Grantees will now be required to submit these prior approval requests through the EHB. Prior approval requests include project director change, carryover of unobligated balances, extension of project period with or without funds, re-budgeting administrative supplements, and other changes such as grantee names or deviation from terms.

On Slide 8 we have the prior approval request process overview. The project director or other user with administrator or grant users privileges in the grant handbook will manage user privileges for prior approval requests.

Grantee users with privileges to edit or submit prior approval requests in the grant handbook will log into the EHBs and begin the request.

In some cases templates of the required documents will be available for download in the EHB.

The grantee will complete required forms in the fields and the Web based form then upload completed required documents as attachments in the EHB.

Business and validation rules will be enforced on the captured data to ensure completeness.

On Slide 9 we've continued the prior approval request process overview with Item 6. Once all required fields have been completed and validated and all documents have been uploaded into the EHBs the grantee will submit the request to HRSA.

HRSA program and grants office personnel will review the request and either approve, disapprove or request more information.

Grantee users will receive an electronic notification of HRSA's decision. If the request is returned for changes make the appropriate changes and resubmit the request through the EHB.

Once the request is approved HRSA will complete the process and deliver any related documentation such as a revised Notice of Grant award or NGA.

Please note that health center cluster grantees will continue to submit change in scope requests through the change in scope module.

Also please note that if you submitted a carryover request prior to EHBs Version 2.0 which was released on November 22, 2009 you do not have to resubmit the request.

On Slide 10 we have registration information for the grant handbook as it relates to prior approval requests.

By default the project director and financial reporting administrators will have privileges to view, edit, or submit prior per approval requests.

All other users must be given privileges by the project director other user with the ability to administer grant users privileges in the grant handbook.

Slide 11 outlines the prior approval request security model. Here you'll see the prior approval requests. There are three different privileges.

The first privilege is view prior approval request which allows access to the read-only version of any prior approval request started by others as well as access to read-only submitted versions of past prior approval requests.

The edit prior approval request privilege allows users to enter and save data in the electronic form as well as uploaded attachments and view reviewer change requests and comments.

The submit prior approval request privileges allows the user to submit the requests to HRSA once all data has been entered and validated.

Slide 12 starts the walk-through of the screens for prior approval requests with the login page. Here we have the EHB's Web site. And you will enter here username and password if you have registered before.

If you've not registered before you will follow the on-screen instructions for creating an account.

Slide 13 shows the EHBs welcome page. Click the View Portfolio link in the left side menu to navigate to the grant portfolio.

On Slide 14 you will see the grants list which contains a list of all grants you have added to your grant portfolio.



Locate the grant for which you want to submit a prior approval request in the grants list and click the Open Grant Handbook link in the right column.

On Slide 15 you will see the Grant Handbook homepage. Navigate to the prior approval request section by clicking on the New/Existing link in the left side menu.

Slide 16 illustrates the prior approval request list page. Any pending prior approval requests will appear in this page. You can click the Search button to view any previously completed prior approval requests.

On Slide 17 we have the prior approval request page again. Here you will select the Begin New Request from the drop-down menu and click the Go button to proceed.

On Slide 18 we have the Create New Prior Approval Requests page. There is an instructions link in the left column which provides additional information about each type of request.

We encourage you to review these instructions before selecting the type of request you wish to create.

On Slide 19 once you've reviewed the instructions for creating and submitting a prior approval request select the type of prior approval request and click the Continue button.

Slide 20, the prior approval request Create a Confirmation Page will appear. Here you will see the prior approval request tracking number. Click the Continue button to proceed to the request.

Slide 21. The next few slides show information that's available to you within the prior approval request status overview. You may use the side menu to jump to any section of the request.

On Slide 22 you will see that links to related information will appear in the status overview table. You can also click the View Details link to display a list of users with permissions to work on the request.

Slide 23. The status page shows all the sections of the request and the completion status of each section.

Slide 24. Here we outline the different statuses that you might see in the status table. The first status is not started.

All sections are initially in not started status. Once any data is entered on a page and saved the status will change to in progress.

The page will remain in progress status until all data has been entered and has been saved. The data on the page will be saved as long as there are no errors on the page.

Once you have entered all the data within each page and there are no errors on the page the page status will change to completed.

Slide 25. Again we have the prior approval request status table. Here you will see that you can click the Update Link in the action column to open a section for editing.

You can update any section, even those marked completed. Please note that doing so may cause the status revert to in progress if any of the changes you make break a validation rule or page requirement.

On Slide 26 we have an outline of the prior approval request section. All prior approval requests consist of two sections.

The first is a general information section which collects point of contact and authorizing official information.

The next section is the detail section which collects information needed based on the type of prior approval requests.

The details section consists of both Web based forms as well as uploaded supporting documents.

On Slide 27 we'll go through each of the sections of the prior approval request starting with the general information section.

Here you will see the both point of contact and authorizing official are required in the general information section.

Slide 28, to add a point of contact click on the Add Point of Contact button.

On Slide 29 you will see you'll see a list of registered users with your organization. To select a user who is already registered click the Continue button or click the Add Point of Contact button to add a new point of contact.

Slide 30. Here we have the prior approval request add new point of contact form. You'll complete this form and please note the required fields are marked with a red asterisk.

Once you've completed the form click the Save and Continue button to return to the general information section.

On Slide 31 we have the general information section, you'll complete the same steps for updating the authorizing official as we just walked through for the point of contact. Once you've done that click Save and Continue to proceed to the details section.

Slide 39 - I'm sorry Slide 32 outlines the information requested in detail section. The information requested in the detail section varies depending on the type of prior approval requests.

The detail section will be pre-populated with information from the EHBs whenever possible. Required fields are marked with a red asterisk.

Document templates will be available for download. All required documents for the type of request must be uploaded before the request can be submitted to HRSA.

So on Slide 33 we have a prior approval request example for the project director change. Here you'll see that required fields are marked with a red asterisk. And the existing project director information would be pre-populated with information from the EHB.

Slide 34, to attach a document you will click the Attach Button to upload the required document.

Slide 35, required documents are listed in the purpose drop down list. Please select the purpose and then click the Browse button to navigate to the drive and directory on your computer where the document is stored.

Slide 36 shows the Attached Document Dialog box. Find the file that you wish to upload and select it and then click the Open button.

Slide 37. Once you have finished attaching all documents click the Finished Attaching button to return to the details section.

On Slide 38 here we have an example of an EHB's error. The EHBs will display errors when requirements are not met.

So in this particular example a cover letter and justification for change is required but I did not upload that type of a document.

So here it's stating that that cover letter and justification for change document are required before you can submit the request to HRSA.

Slide 39. We have the last section of the prior approval request detail section which is the description. Here you can enter a description or summary about the prior approval request as well as provide any additional information that may not have been included in an uploaded attachment.

Once you have entered information in the description field click the Save and Continue button to proceed.

On Slide 40 you will see the status overview of the prior approval request. And the status of both of the sections now appear as complete. Click to Proceed to Submit Request button to submit the request to HRSA.

On Slide 41 we have the Prior Approval Requests Electronic Signature page. Before submitting the request to HRSA you must certify that you are authorized to submit the request by checking the checkbox. Click the Submit Request button to continue.

On Slide 42 we have the Prior Approval Request Submission Confirmation page. The confirmation message will appear stating that the request has been submitted successfully.

And that concludes the walkthrough of the prior approval requests. Now on Slide 43 we'll start talking about the electronic document submission with the overview.

For awards starting December 1, 2009 and later the EHBs will support electronic submission of reporting requirements for documents required as a condition of award on the NGA.

Please note that the NGA will specify that EHB submission is required. Conditions of award prior to December 1, 2009 will be submitted using the previously established method.

HRSA programmer grants office personnel may also request other information through EHBs. Processes for existing program specific systems will not change.

Examples of these existing systems include financial status report or FSR, the UDS, help center cluster change in scope system, Ryan White data report, and HCOF report.

On Slide 44 we have information about these electronic submissions. What are electronic documents? These documents may be reported requirements or other documents requested or required by HRSA.

They will be available in the grant handbook under the appropriate sections. These sections include progress reports, performance reports, or other submissions.

On Slide 45 we have the electronic document submission process overview. Submission will be available in the grant handbook on the date specified by HRSA.

An email notification will be sent to the grantee reminding you to submit the requested information.

Grantees will upload required documents into EHBs and submit the report or submission to HRSA.

Business and validation rules will be enforced on the captured data to ensure completeness.

Once all documents have been uploaded into the EHB the grantee will submit the documents to HRSA. HRSA program and grants office personnel will review the documents and either approve, disapprove, or request more information.

If return for changes, please make the appropriate changes and resubmit the report for submission through the EHB.

Slide 46 we have information about registration to the grant handbook for these electronic document submissions.

By default the project director will have access to all reports and submissions. All other users must be given privileges to view, edit, or submit by the project director or other user with the ability to administer user privileges in the grant handbook.

Slide 47 outlines the security model for the report and submissions in the EHB. You'll see each type of the submissions that I was talking about on the previous slide via progress report, performance report, and other submissions.

For each type of this post-award requirement there are three different privileges. The first is view which allows users access to read-only version of any reports or submission started by others as well as access to read-only submitted versions of past reports or submissions.

The edit privilege allows users to enter and save data in the electronic form as well as upload for prior documents and view the reviewer change request and comments.

The submit privilege allows users to submit the information once all data has been entered and validated by the EHB.

So on Slide 48 we'll do a walk-through of the screen for uploading an electronic document submission.



When you log into the EHB you'll follow the same steps to navigate to the grant handbook as we did for prior approval requests.

From the grant handbook homepage click on the Monitor Schedules link in the left side menu. The Monitor Schedule page will display a list of upcoming reports or submissions that are pending action by the grantee.

Click the link in the second column to navigate to the section where the report or submission is located.

On Slide 49 you'll see the submissions list which will display all required reports or submissions that are not started in progress or change requested status.

On Slide 50 here we'll talk about the schedule status that will be displayed in the submissions list. The scheduled status describes the lifecycle of the report or submission.

The not started schedule status indicates that the report or submission has never been worked on. When a new report or submission is available in the grants handbook it will be in not started status.

Clicking on the Start Report or Start Submission link changes the status to in progress.

The submitted schedule status indicates that the report or submission has been submitted to HRSA.

After the information has been submitted it is reviewed by HRSA. If the reviewer determines that changes are needed, the report or submission will be made available to the grantee again for changes.

The schedule status will move to change requested. The schedule status will stay in this status while it is being corrected.

When changes are made and the report is resubmitted the scheduled status will revert to submitted.

On Slide 51 we have the submission status which describes the status of the report while it is being repaired, reviewed or revised either originally or in a response to a request for changes.

The not started submission status indicates that the report for the current cycle has not been started. The report can be in not started status either during the first cycle when the scheduled status is not started or in subsequent cycles when the scheduled status is change requested.

Clicking on the Start Report or Start Submission link changes the status of the report to data entry in progress.

Review in progress submission status indicates that the report has been submitted. This could denote either the first submission or any subsequent resubmissions.

Slide 52, submissions list. To begin a report or submission click the Start Submission link.

Slide 53, The Electronic Document Submission page will open. Summary information about the report or submission appears at the top of the page. This will include the submissions name, the deadline date, reporting period and other related information about the report or submission.

On Slide 54 you will see that the EHBs contain a link to report or submission instruction. To access these instructions you can click the View link.

Slide 55, if available there will be a link to download a template for submitting the requested information or report. Click the Download link to access this information.

On Slide 56, click the Attach Button to upload the completed template and any other required attachments.

On Slide 57 we have the electronic document attach files page. The required attachments will appear listed. Click the Browse button to locate the file.

Slide 58, Once you've attached all of the documents you have a few options at the bottom of the page in the Choose Action drop-down list. You can either choose to submit the report or submission to HRSA or you can save and continue the report or submission to come back and work on it later.

Once you've entered all of the information and uploaded the required documents select the Submit to HRSA option and click Go.

Slide 59 you will see the submit to HRSA page. This is a confirmation page. You must click the appropriate button to complete the action.

Click the Submit to the HRSA button to submit the report for review.

On Slide 60 you will see that a submission confirmation will appear once the report or submission has been submitted to HRSA successfully.

And that concludes the walk-through of the electronic document submission process.

On Slide 61 we just have some resources that are available to you. The first is the EPB's Web site. If you use the EHBs frequently we recommend that you add this to your favorites because you may be coming here often.

The next resource that we have listed here is the HRSA Call Center which is available 9:00 am to 5:30 pm Eastern Time Monday through Friday. You can reach them toll-free by phone at 877-goforhrsa. That's 877-464-4772 or by email at [callcenter@hrsa.gov](mailto:callcenter@hrsa.gov).

And that concludes the PowerPoint presentation walk-through. And now we'll open up for questions and answers.

Coordinator: Thank you. We'll now begin the question and answer session of today's conference. If you would like to ask a question please press star 1. Please make sure you un-mute your phone and record your name when prompted so I may introduce your question.

If you would like to remove your question from the queue you may press star 2.

Our first question comes from (Heather Treno). Your line is open.

(Heather Treno): Thank you. Does the email notification come from the PI or to the - like for where in an institution would it go to the Office of Sponsored programs? Who would just get that notification?

Jillian Robey: Right now the email notifications go to the PI or project director that's listed on the Notice of Grant award. However, we have received a lot of feedback about other people who may want to receive notifications. And we're working on a way for implementing that.

(Heather Treno): Okay, thank you.

Jillian Robey: You're welcome.

Coordinator: The next question comes from (Donna Dupree). Your line is open.

(Donna Dupree): My question was I have two grants on there. One is finished and one is the new one. And I tried to get in and I can't get in. Is that because this hasn't been uploaded yet?

Jillian Robey: I'm not sure that I understand your question. I would recommend that you contact the HRSA Call Center and they can look at the specific details of your grants.

(Donna Dupree): Okay, thank you.

Jillian Robey: You're welcome.

Coordinator: Our next question comes from (Francis). Your line is open.

(Francis): My question has to do with the (fraud item). Sometimes when I'm working on the EHBs and I transfer - try to log out I don't have the link for logout so I have to just leave it on to, it's in, you know, its (hard).

And then again regarding this conference, I have two questions about the (also I have a) request.

If - let's assume that also I have a request to make. If I do not open the EHB and there's a request pending from the HRSA employee, how do I get to (know)?

Jillian Robey: So the request will be if they request the information through the EHBs they'll be available in the grant handbook. You have to be a registered member of the grant handbook to see those requests.

As far as being able to log out of the EHBs there should always be a Logout link on the left side. You might have to scroll to the far left to see that Logout link but it would appear under the left side menu.

(Francis): Okay.

Man: I would like to add that we have not built the process within your organization or within the grantee organization. So if somebody else is creating the prior approval request, somebody else has to submit. That communication is still outside the system.

That's all.

Chris Suzich: Did that answer your question sir?

(Francis): Yes. But the only question I have has to do with the recent development that we have to submit the audits report.

And I was - I called your Call Center that we need to submit the audit report through electronic means.

And the audits - I mean the Call Center told me that I have to get in touch with the program officer to do that, that the phone link for us to do that. So can you help me with that?

Man: Mr. (Francis), can you give me your grant number?

(Francis): U38MC00B70.

Man: I'm sorry, U3 what?

(Francis): U38MC00217B0.

Chris Suzich: Okay thank you.

(Francis): All right.

Man: We'll get in touch with you.

(Francis): All right.

Coordinator: Our next question comes from (Natasha). Your line is open.

(Natasha): Hi. I was just wondering, I just started going back in since this new. Will we still get email notification from our bureau saying okay your grant is available in EHB to do any changes? Or are we expected to go in and check periodically? Because I always forget how the schedule goes.

Jillian Robey: So you will receive - the project director on the grant will receive notifications if electronic submissions are coming up. The system will send out information about logging in and submitting those.

(Natasha): Okay great.

Jillian Robey: However for members of the organization who are not the project director so they may or may not receive notifications, if they log into the EHBs they will see it listed there.

(Natasha): Okay great.

Coordinator: Our next question comes from (Dorothy Lane). Your line is open.

(Dorothy Lane): Yes if a request was submitted prior to November 22 for a carryover of unobligated balance will that be populated in the new system or we just use the old way of finding out?

Jillian Robey: You'll use the old way of finding out. So you will not have to resubmit any carryover requests that you submitted prior to November 22, 2009. However, they will not show up. Anything submitted prior to November 22 will not appear in the EHBs.

(Dorothy Lane): Okay. All right. Thank you.



Jillian Robey: You're welcome.

Coordinator: Your next question comes from (Cheryl). Your line is open.

(Cheryl): I'd like you to clarify the steps. We're not the project directors here but we are in the Financial Aid Department. We submit that annual operating report or the performance report.

And we're having some difficulty in accessing it. And we've been trying to work with your team to get the project director to authorize us.

But if you could just clarify the steps of filing the annual operating report using the EHB we'd be much appreciative.

Jillian Robey: Well as far as getting access to that grant handbook, when you log into the EHBs there's a link to add the grant to the grants portfolio. And you would follow the steps through there.

(Cheryl): We did follow those steps then we still ended up with areas that were disabled and grayed out. And that's what we've been working with your team for about a week and a half now. We just don't want to be caught without access to the reports.

Jillian Robey: And by our team do you mean the HRSA Call Center?

(Cheryl): Yes.

Jillian Robey: Okay. So I - continue working with them because they can actually see information that we don't have access to here.

(Cheryl): Okay.

Jillian Robey: And they'll work to make sure that you...

(Cheryl): When will the report to the nurse faculty loan program report be up?  
It's usually due in August.

Jillian Robey: Right. Yes. You'll have to check with the Program Office.

(Cheryl): Okay. All right. Thank you.

Coordinator: (Sim Simmons) your line is open.

(Sim Simmons): Hi. I'm from University of Washington and we're in the Central  
Administration Office. Actually I have two questions.

The first question is do we have to use the template that you mentioned? The reason I'm asking because of the PI change, request a change and scope of work. And there might be some graphic or picture or something other than just text. And can we just upload that as an attachment?

Jillian Robey: Yes. In many cases there's the option to upload something other than the specific template.

You would want to - and if you are including additional information make sure that the information requested in the template is included in your request.

(Cheryl): So the template will allow us to upload the original request or the image on the PI, the image or the graphic that's sent to us by the PI?

Jillian Robey: Right. So in some cases like for a project director change there aren't templates that are available or required for download. There's just certain types of documents like the new project director CB or resume as well as the Justification for Change file.

So in those cases you can include the information that you wish to submit to HRSA in one of those attachments.

(Sim Simmons): Okay. Thank you. And my next question is at the University of Washington somehow we have three accounts. And how do we go about to consolidate all three accounts into one so that we can view all of our grants in one lock-in?

Jillian Robey: I would go ahead and contact the HRSA Call Center and they can work with you to consolidate those accounts.

(Sim Simmons): Okay. Thank you.

Jillian Robey: You're welcome.

Coordinator: (Lynn McCormick) your line is open.

(Lynn McCormick): Hi. I had a question regarding the quarterly progress reports.

We had an extension approved. And then I thought we'd have to do another progress report but it didn't show up.

So I didn't know if that's something I need to contact the Call Center regarding that?

Jillian Robey: Is - were these quarterly progress reports that you submitted outside the EHBs?

(Lynn McCormick): No, they were through the EHB.

Jillian Robey: Okay.

(Lynn McCormick): No, they were through the EHB. And we were going along fine until we got the extension. And then there was the quarterly part didn't appear. And so I didn't know if that's something I need to contact someone on my end or your end.

Jillian Robey: Yes. I would contact the Call Center and they can look into it and see what's causing it not to appear for you.

(Lynn McCormick): Okay. And I have one more question on other submissions.

For example a notification letter of project completion is listed there. And it's not started but the submission status says not applicable. So is that something we don't need to do or something that just hasn't been started?

Jillian Robey: Yes, it sounds like that parameter has not been set up. But if it's in there and it's not showing as being submitted then I would disregard that submission status.

(Lynn McCormick): Okay so it's still required?

Jillian Robey: Yes.

(Lynn McCormick): Thank you.

Coordinator: (Shanna Ameen), your line is open.

Hello, (Shanna), please check your mute button.

(Shanna Ameen): Hi. Sorry about that. I had a question about what the purpose of implementing this. Is there any day deadline to submit carryover requests after you submit the FSRs R? Because some of the FSRs we submit electronically our interim FSRs.

So are we only given 30 days to submit the carry over for an interim FSR and then go back and revise it once the final is submitted as well?

Jillian Robey: Well first the purpose of the 30 day is because the unobligated balance of funds if not used for carryover can be used to offset a grant. So we need those timely notifications.

(Shanna Ameen): Okay.

Jillian Robey: Can you ask your second part of your question again?

(Shanna Ameen): Right. The issue we're running into is because we have to remain in compliance and submit an FSR within a 90 day deadline, some of the FSRs we submit are interim FSRs and because we still have encumbrances from other subcontractors and things like that. So they will be finalized at a later date.

So sometimes the program is going to run into an issue whether they have to submit a carryover within the 30 day deadline of the unobligated balance for the interim FSR or can they wait until they submit the final FSR and then request the full amount?

Jillian Robey: Okay if you're - let me just clarify. Because if you're asking to carry over unobligated balance of funds and that's approved and then you're saying it's late - it's possible later that you would revise that FSR?

(Shanna Ameen): Right because some of the FSRs are not final FSRs. They're still - all of the encumbrances have not been liquidated. So there could be more funds available at a later date.

Man: Do you have a Part A or Part B grant?

(Shanna Ameen): We do yes. But, you know this involves other grants as well with other PIs.

Jillian Robey: Can we take your name...

(Shanna Ameen): Yes.

Jillian Robey: ...maybe one of your grant numbers and we can talk to you off-line?

(Shanna Ameen): Well it's federal grants. Can I just give you my contact information?

Jillian Robey: That'd be fine.

(Shanna Ameen): Okay. The email is sry01@healthresearch.org. And my number is 518-431-1273.

Man: 518-431-1278?

(Shanna Ameen): 1273.

Man: And you're with Health Resource?

(Shanna Ameen): Yes. Thank you.

Jillian Robey: Okay thanks.

Coordinator: (Donna Mulkey) your line is open.

(Donna Mulkey): Thank you. On Slide 50 you talk about once a grant has been submitted a change could be requested. Will the PI be notified by email if that change has been requested or do we have to keep monitoring the account?

Jillian Robey: If the - the PI and the person that submitted the request or the report will be notified.

(Donna Mulkey): Okay. Thank you very much.

Coordinator: And our next question comes from (Meadow Marto). Your line is open.

(Meadow Marto): Yes I was noticing that on the ARRA schedules for like the CIP and IDS it's not listed under the monitor schedules when I check.

Jillian Robey: The submissions that are - that can be submitted through the EHBs are for awards with the budget periods start date of December 1, 2009 and later.

So if those submissions were required on an award that was released before December 1 you would follow the same method of submission that was established previously.

So if you - however you submitted those reports you'll continue to do that until your next awards budget cycle.

(Meadow Marto): Well I know that there was just a call for the ARRA that is due January 10, 2010 that I thought was going to be through the EHB, the ACQR. And it's just not listed in the monitor schedule. So am I - are we using a different methodology for that?

Jillian Robey: Okay, so anything that was previously submitted through the EHBs before - or I'm sorry, before December 1, if you submitted it through the EHBs, those will continue to be submitted through the EHBs. In this particular case I would refer you to the Call Center so they can look into why that's not showing up.

(Meadow Marto): Okay. Thank you.

Jillian Robey: You're welcome.

Coordinator: You have another question from (Sim Simmons). Your line is open.

(Sim Simmons): Yes hi. On the Slide Number 10 it says that the PD and financial reporting administrator will have privilege to view, edit and submit the prior approval request.

So in the Central Administration Office can we create all of the requests and then submit that?



Jillian Robey: If you have the financial reporting administrator privilege in the EHBs.

(Sim Simmons): Well we are in the pre-award office so we don't submit financial reports.

Jillian Robey: Right. So the business - we've given the privileges to prior approval requests to business officials or authorizing officials who validate their account using the payment management system PIN.

So if you have that information and can register and validate using the PMS PIN then you would be able to submit and create prior approval requests.

(Sim Simmons): Well we're in the pre-award office.

Man: Okay you in the pre-award office are familiar with University of Washington. There is another group with UW that has those...

(Sim Simmons): PMS PINs?

Man: ...the PMS PIN.

(Sim Simmons): Right.

Man: They worked with us during that FSR development. So that would be the group that would have that information.

(Sim Simmons): Okay.

Man: You're not down as the AO.

(Sim Simmons): Okay. So we - it seemed like we have to contact our accounting office to get the PMS PIN in order to submit the request if we need to do so by our...

Man: But we're not telling you to - that's something that has to be worked out with your administration because the PMS PIN is private information. So I think only certain individuals within the university would have access to that information. And that may not be a pre-award function.

(Sim Simmons): Yes that's true. And but then I guess I'm going to follow-up with them and then maybe I call the Call Center back.

Man: Okay but if you're in the pre-award - if you're in the pre-award piece of the University I'm not clear as to what post award transaction you'll be handling.

(Sim Simmons): We are pre-award but we also handle post-award functions as a prior approval request and (no cut) extension and that kind of thing.

Man: Okay, you'll have to work that with the other group as well as the PIs on the grants at the University.

(Sim Simmons): Okay, thank you.

Coordinator: And there are no other questions in the queue at this time. Once again if you did have a question you may press star 1.

Chris Suzich: Let's wait about 30 seconds please operator.

Coordinator: Okay.

Chris Suzich: Operator could you give the instructions for submitting a question one more time?

Coordinator: Sure. If you would like to ask a question, please press star 1, make sure you un-mute your phone so I may introduce your question.

And we have a question in the site from (Delia Brelan). Your line is open.

(Delia Brelan): Not really a question but I heard people saying that they could not view their grants we just submitted - submitted one November 24. It hasn't showed up in the workbook.

And also of the lady that was talking about the performance report from the - for the ARRA reports and I just want you to know it's not one person. When I go in there to work on reports it's just not there to work on so...

Jillian Robey: Okay. So for that again, I'm going to have to refer you to the HRSA Call Center so they can look into it. And if it's something that's happening across the board they can escalate that to the developers who will fix it across the board.

But as far as you said you submitted your grant on November 24?

(Delia Brelan): Yes.

Jillian Robey: You submitted an application for a grant?

(Delia Brelan): Yes. It was a continuing grant application.

Jillian Robey: And so...

(Delia Brelan): Go in and view to see if it's there -- whatever. We haven't been able to see anything since we've submitted it. It's not coming up.

Jillian Robey: Did you submit through grants.gov and you're waiting to access the EHB?

(Delia Brelan): No. This was after submitting it in EHB.

Jillian Robey: Okay. You can follow-up. What is your budget period start date?

(Delia Brelan): April 1, 2010. It's the new one that we were working on.

Jillian Robey: Okay. And you recently submitted your application?

(Delia Brelan): Yes. So...

Jillian Robey: Okay. And it'll take some time for that application to go through the review process. And you can communicate with your grants management specialist. You should hear something prior to April.

(Delia Brelan): All right. I guess - okay, all right. And we'll just call about the ARRA report?

Jillian Robey: Yes please.

(Delia Brelan): Want to start - we need to start working on them.

Coordinator: And there are no other questions or comments at this time.

Chris Suzich: Any other questions operator?

Coordinator: There are no other questions or comments at this time.

Chris Suzich: I'd like to thank everybody for joining us today. In the event that anybody in your organization needs to participate in our final call, it will be tomorrow Eastern Time 11 o'clock, same call number. Thank you everyone.

END