NWX-HHS HRSA OFAM

Moderator: Christopher Suzich
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12:00 pm CT

Coordinator: Welcome and thank you for standing by. At this time, all participants will be in a listen only mode until the question and answer session of the call. If you would like to ask a question during time, please press star then one.

Today's conference is being recorded. If you have any objections, you may disconnect at this time.

Now I would like to turn over the meeting to Christopher Suzich. You may begin.

Christopher Suzich: Thank you operator. Good morning and good afternoon, depending on where you are located, everybody, and thank you for joining todays HRSA Grantee Conference Call. We hold these calls periodically and we hope to provide you all with some useful and valuable information. We will talk, my colleagues and I will go over a few things for about 20 or 25 minutes and then we'll open it up for questions.

We found in the past that if you don't have a particular question, you might still want to listen in, just because there's some useful information given out and perhaps a question that somebody else has will jog something in your memory or will help you with perhaps an issue or a question that you had. But, of course, you can disconnect at any time.

My name is Chris Suzich, and we have several subject matter experts with us today with HRSA. And if we can't answer your question at the end of our letter audio presentation, we will take your contact information and get back to you with an answer over the next week.

There are a few things on our agenda that we'd like to talk about, one is the FFR or the FF425. Before we get to that, I wanted to provide you with some phone numbers that you might already have. An important stop and probably the first stop for all of you, when you have a question is the HRSA Contact Center. And, in the event that you don't have that number, I'm going to give that to you now and their email address.

So, you might want to have a pencil and paper handy to jot down a few notes during our call today.

The first Contact Center number, when you do have a question about EHBs, is 877-464-4772, and that's a toll free number. If it's after hours, you can always send an email to the Contact Center and they'll do their best to get back to you quickly. That email address for the HRSA Contact Center is callcenter@hrsa.gov. That was call center the at sign hsra.gov.

There is a separate help-desk phone number that might be useful for you all, and that has to do with the Payment Management System. We'll talk a little bit more about the Payment Management System and the role that Payment Management System plays in financial reporting.

But, the Payment Management System maintains a separate help desk. This is, as most of your already know, EHBs, the system that you use to help manage your grant, that is not the system you use to draw down funds for your particular grant award. You use the Payment Management System for your draw down needs.

If you have question specific to the Payment Management System, a draw down that you're trying to do, bank account information that you need to supply to get that account set up, the Payment Management System help desk phone number is 1-877-614-5533.

As I said, there is some financial reporting that we require within EHBs and there is financial reporting that you need to do directly into the Payment Management System. I won't say anything more because I don't want to confuse you. I'm going to turn it over to Kelly, who's an expert in the financial reporting for HRSA. And, she can explain some of the differences between the reports that all of our grantees need to submit and the timeframes that are around those reports.

Unfortunately there are no absolutes, but we can give you some good direction in terms of when you're reporting might be due and, of course, you always want to refer to your NOA, your Notice of Award, for the final award in terms of what you need to do. You'll find the terms and conditions and reporting requirements all listed on your NOA. Kelly?

Kelly Long: Thank you Chris. My name is Kelly Long and I work in the Division of Grants Management Operations within HRSA. And, my team is primarily responsible for assisting the grant staff in their day-to-day operations of grants management, particularly in the post-award monitoring and closeout processes of the grants management life cycle.

So I'm here today to talk to you about the Federal Financial Report, and I'll cover three points. First, is the difference between the financial reporting to the Grants Office in HRSA and the financial reporting to the Payment Management System, as Chris referenced. Again, Payment Management System is the place that you are withdrawing your grant funds.

The second point will just be a quick overview of what the grant specialists are reviewing when they received your FFR.

And third, the importance of submitting your FFRs timely and accurately.

So first, to give you an overview or provide you with the different with the financial reporting to HRSA, the Grants Office and your financial reporting to the Payment Management System.

It's important to know that the FFR, also called the Federal Financial Report, which also has the Standard Form No. 425. That's the OMB approved number. That's a single page form that recipients are using to file both their cash transactions and the financial status information.

So therefore, both HRSA and the Payment Management System are utilizing this form to monitor recipient's financial data. It's important to know the difference between the FFR reporting requirements to HRSA and the Payment Management System, because both entities do have consequences for failing to submit the reports.

First, you are required to file quarterly cash transaction reports via the Payment Management System. In this report, you're reporting your cumulative disbursements of the cash that you've withdrew from PMS.

This would be Lines 10A through 10C on the FFR form, the Standard Form 425.

Then you are reporting your expenditure of funds, and if applicable, cost sharing or matching dollars and program income, on either a semi-annual or annual basis to the HRSA. And, this is done through the Electronic Handbooks. This is Line 10D through 10O on the FFR-425 form.

The schedule for submitting the semi-annual or annual financial report is specified in your Notice of Award under the Reporting Requirements section. Your due date is dependent upon the grant program cycle, so the NOA is the best resource for knowing when the report is due to HRSA.

You can also look in the Electronic Handbooks for your particular due date.

To cover the second point, to give you an idea what our grant specialists are reviewing when your FFR is received, so when the report comes in through the EHB, they'll carefully review the data that your supplied and they'll check it for accuracy, reasonableness and completeness.

Through their review, they will determine if there are any significant changes in the rate of obligation or expenditure from that of what is expected, and they will ensure consistency with the terms and conditions of the award.

If you have a program that requires you to match expenditures, your grants specialist will also ensure that you're meeting your matching requirements, and likewise if you have a program that contains program income our grants specialist will review to ensure you're accounting for program income in accordance with the terms and conditions of award.

If the grants specialist has a question or identifies a discrepancy within your report, they may elect to return the report thought the Electronic Handbooks, as a change request. An email is sent from the system to notify you of the requested change.

And finally, the third point, the FFR's submitted, it's important to submit your reports on time. HRSA does taking financial reporting requirements very seriously. If you're not in compliance, HRSA may take an adverse action, which can include perhaps a draw down restriction. They may withhold a continuation award or we may withhold monetary revised awards.

So, for example, a request to carry over funds could potentially be denied, if the organization is not compliant with the financial reporting requirements. We may also, in extreme situations terminate a grant if it's deemed appropriate.

Therefore, it's imperative that you comply with both the requirements, to ensure continued funding, that you have access to the funds when needed and for future award opportunities.

Please know that if you have questions pertaining to information or data on the FFR, you may contact your grants management specialist. If you have technical issues with the EHB during the FFR process, you are to call or email the HRSA Contact Center. Chris?

Christopher Suzich: Thank you Kelly. It's a lot of useful information. And, as I said before, we will be taking any sort of questions you might have about the FFR at the end of our little audio presentation.

At this time, I'd like to ask the operator to provide the call back number. It could be the case where some of our listeners have colleagues that weren't able to join the call today and fortunately, we have a toll-free phone number that will be made available, shortly after this call, later on today that anyone can dial and listen to a recording of this call again.

So, if they couldn't participate in the call, you can go ahead and dial in later today. Angela, could you provide that?

Coordinator: Toll-free number is 866-448-5647. Toll number is 203-369-1189.

Christopher Suzich: Thank you, Angela. We will repeat that again later on, because I know that's important for some people to be able to listen to the call later on, after the fact. And, that recording is available, I believe for 60 days after today.

The next item on our agenda has to do with something we call sub-accounting, and some of you are already familiar with sub-accounting, but a lot of our grantees are not, but will become more familiar with sub-accounting this year and next year.

Sub-accounting, for lack of a better definition is the way in which your particular grant funds are set up and then the way you draw them down, when you log into the Payment Management System. It allows for better tracking and better monitoring, for lack of a better word, of the grant funds associated with each grant.

Some awards this year will be subject to sub-accounting and some will not. I'm going to ask Kelly to say a little bit more about sub-accounting. And, as I said, in the end we'll be able to take any questions you might have. Kelly?

Kelly Long: Thanks Chris. So, as Chris mentioned, we are implementing this year, in FY2014, that began October 1, 2013, were we will be sub-accounting all of our new and competing continuation awards. So, if you applied for a competitive FY2014 funding opportunity, and you receive a new or competing continuation award, you can expect that award to be sub-accounted in Payment Management.

What that means is, is that when you go to draw your funds, you will need a sub-account code, which is identified at the bottom of your notice of award to draw those funds, and you are drawing them directly for our particular grant program.

Unlike the pooled accounting, where you have an account number and you may have several grants, both HHS and non-HHS grants within the account that you're kind of drawing from the pot of money. And then, reporting your disbursements back on a grant-by-grant basis.

So, to identify or to help you know if your documents or grant is in a sub-account or a pooled account, there's a couple of pieces of information that you could look at.

One is your notice of award. That will certainly identify whether you have the sub-account. Again, at the bottom of your NOA there's a field for sub-account code. If there is a code there, then it's in a sub account. If it says NA then it's in the pooled account.

The second way to identify is if you know your PMS account number, the last character of your account number identifies the type of account. So, if you have a G or a G1, that's a pooled account. If it ends with a P, as in Peter, or B, as in boy, that is a sub-account.

So, it's important to know and understand the difference between those two, so that you can get your money from the correct grant. We will not be sub-accounting non-competing continuation awards. So, that means if you previously applied and already received a newer competing continuation award 2013 or prior, and you're just submitting an annual progress report, to continue your funding, we're not sub-accounting those particular grants at this time. It's only for our new and competing continuation awards.

And, I'll be happy to take questions after this brief presentation. Chris?

Christopher Suzich: Thank you Kelly. The next item we have on our agenda, I'd like to turn it over to (Helen) and she's going to describe a little bit about what we call Type 5 or non-competing continuation awards. Sometimes, our grantees have questions about the award that they just received.

You know, there are a variety of awards, brand new awards that we refer to as Type 1 that Kelly just eluded too. There are also competing continuation awards and there are what we call non-competing continuation awards.

And, (Helen)'s going to tell us a little bit about those. (Helen)?

(Helen): Thanks Chris. A non-competing continuation award, which we call NCC, is a financial assistance request in the form of a progress report for a budget period that is subsequent to the first of a competitive segment.

You don't have to compete for these funds, but you must submit your progress report. The progress report is a submission, which is created within the EHBs. So, about 120 day before the budget-period start date, the program will create the submission and they will include instructions for what you need to include in your progress report submission.

If you look at your notice of award and you have future recommended support in Block 13 on the Notice of Award, and you know that's a signal to you that you will have to submit a non-competing continuation progress report for your budget year funds.

As I said, the program will create that for you and you can submit according to what you need to do according to those instructions. And, as Kelly said earlier, the non-competing awards will not be released unless the required FFR has been submitted for the previous year. So, your funding will depend on the submission of your annual FFR. That's all I have Chris. Thank you.

Christopher Suzich: Thank you Helen. The next two topics we'd like to talk about, I'll be turning it over to (Melissa) to explain. There are two things. As you probably already know, there are a lot of roles within EHB system. EHB is a role driven system, and depending on the functions, the tasks that you need to complete in EHBs, there are a variety of roles available for you.

For instance, there is a project director role, there is a budget officer role, there are other roles also that limit or do not limit the number of tasks that you can do within EHBs. And, this is true internally of our HHR City users internally, HRSA employees, as well as the grantee community.

So, (Melissa)'s going to explain a little bit about that. Sometimes the user might be confused because they are trying to execute a task within EHBs and they are not seeing the necessary screens, but the underlying reason is because they haven't been granted or yet received the permissions, by way of the proper role, to execute the necessary tasks.

So, (Melissa)'s going to talk to us a little bit about that. In addition to that, (Melissa)'s going to provide us with some valuable information about EHB's help resources that are available to everybody. We have gotten more into videos lately, so there are a number of videos available that can take our users through certain tasks, any EHBs. There's also some documentation available on hrsa.gov's web site, as well as within the EHB's application itself.

So, (Melissa), I'd like to turn it over to you.

(Melissa): Thank you Chris, and thank you everybody for joining. As Chris mentioned, I'm going to go over a few rules that are available to you in the EHBs. I'm going to go over both the organization roles and the grant roles. I'm going to start off with the organization roles.

As I'm sure, many of you are aware, when registering the EHBs or even if you need to update your (unintelligible), you'll have a selection (unintelligible) to choose from, Authorizing Official, Business Official or other.

Authorizing Official role is the individual named by the organization, who's authorized to act for the applicant and to assume the obligation (unintelligible) by federal laws, regulations, requirements and conditions that apply to both parts.

If you are the Authorized Official of the organization, you should choose that role. The Business Official is the person at the organization who's authorized to review and send the financial status report and interact with the Payment Management System.

The last organization role is other and this is just somebody other than the authorized and official or business official. It could be someone such as an application preparer, communications contact, et cetera.

The next three roles, I'm going to go ahead and go over are the grant roles, Project Director, Financial Reporting Administrator and Other.

Now, the Project Director of the organization is the person responsible for the scope of the grant within the organization. The Project Director is the person whose name will appear on the Notice of Award. When the Project Director adds the grant to their portfolio, they're automatically given nonfinancial report privileges by default.

The Project Director is responsible for giving nonfinancial report privileges to other uses and to organizations.

Now, the Financial Reporting Administrator is the person responsible for submitting and approving the Federal Financial Report. The FRA or the Federal Financial Report Administrator, usually is also the Business Official, but can also have Authorized Official role as well.

And, in fact, one thing I wanted to note about that, to add the grant to the portfolio, as the FRA, you would either need the Authorized Official or Business Official role. You would also need the account I.D. from the Payment Management System.

Now, the Financial Reporting Administrator automatically has privileges to the financial report and is responsible for granting financial report privileges to other staff.

The last grant role I'm going to go over is other. And, this is just staff at the organization that are not the Project Director or the Financial Reporting Administrator, someone who might be working on reports, whether it be financial or nonfinancial reports. When adding a grant to the portfolio, as an other employee, you can request access from either the Project Director or the Financial Reporting Administrator.

One thing I wanted to mention, as well, as far as the Project Director role goes. We usually recommend that the Project Director has a backup person. And, that means that they grant the nonfinancial report privileges, all of them, to another user, just in case they're on vacation or for whatever reason. That really helps, especially if reports need to get done.

Now, I'm going to go over some help resources. What I just went over actually is the EHB role. Most of you have the web site for EHBs. I'll go ahead and go over it again. It's https://grant.hrsa.gov/webhelp/login.asp

Now, when you're in the EHB, if you look in the upper right hand corner, there's a support icon, there's a dropdown EHB's help. Also, on the bottom right hand side, there's a question mark, that has the link for the EHB's help as well.

So, you can use it at any (unintelligible) and it has a lot of useful information, not just on grant access, registration and user roles that I went over, but you can also find information on prior approval requests, ADM submissions, the

Federal Financial Report, noncompeting communications. There's a wealth of information on the help on EHBs.

The other two sites I'd like to mention are YouTube. If you go to YouTube and type in hrsatube or electronic handbooks, there's quite a few videos that might be helpful.

Also, the last web site I'll mention is the HRSA web site. If you go to the HRSA web site and click on the Grant Tab and then Manage Your Grant, you're going to find a lot of useful thing, such as transcripts to previous calls, the Award management Tutorials, there's different PowerPoints, there's Financial Report Quick Reference Guides. It has a wealth of information.

That's pretty much it for the reports that I wanted to go over. Chris?

Christopher Suzich: Thank you (Melissa). I didn't mention before, but I should have, in addition to the audio recording that the operator has provided the phone number for, we will have a written transcript of the call today, available on the hrsa.gov grants web site and that should be available in about a week. So, if anybody wants to read a transcript of the call today, that will be made available in about a week.

At this time, I'm going to ask Angela to once again give the recording call back number in the event that anybody wants to listen to the call after it's over today. Angela, could you give that number again?

Coordinator: Toll-free number is 866-448-5647. Toll number is 203-369-1189.

Christopher Suzich: Thank you Angela. We're going to get underway with our question and answer period, so if you have any questions, Angela's going to give some instructions on how you can ask, what buttons you need to press on your phone to ask those questions.

Before we go there, I'd just like to ask that you have your grant number handy, if possible, before you ask your question, because there's a good chance that we will ask you for your grand number, after you ask your question, because that helps us. One, there's a chance that we could real-time lookup your grants and that would help us answer your question.

And two, if we don't have the answer, we're going to need that grant number to do some research on our end and get back to you. So, if you could have that handy if possible. And, Angela, could you kick us off for the question and answer period?

Coordinator: Thank you, we will now begin the question and answer session, if you'd like to ask a question, please press star 1.

One moment please, for the first question. Our first question comes from Northeast Oregon Network.

Woman: Yes, I was curious when you were talking about all of the different roles in EHB, does the Authorized Official have access to all of those functions?

(Melissa): The Authorized Official, do you mean as far as granting privileges and whatnot?

Woman: Well, no. So, if the Author - we're a very small organization. So, I'm the Authorizing Official, but I'm also doing the fiscal reports. Do I need to register myself twice as the fiscal person and again, as the Program Director or if I'm in there as the Authorizing Official can I access all the functions I need to do the financial and program reporting as well?

(Melissa): Well, if you're the Authorizing Official, and you have that role in the EHBs that's fine. You will have to add the grant (unintelligible) portfolio. Are you saying that you're both the Project Director and the Financial Reporting Administrator?

Woman: Yes, we are a very small organization. And, I have gone ahead and successfully added the grant portfolio to our organization, as I am assigned to it as the Authorizing Official.

(Melissa): Okay, so if you're the Project Director of the organization and if you had the grant in your portfolio, and you have non-financial report privileges that's fine. You might have to re-add the grant to your portfolio as the Financial Reporting Administrator, to get the financial report privileges.

If you add it as the Financial Report Administrator first, you'd have to re-add it to Project Director.

Woman: Okay, so just being the Authorizing Official doesn't give me access to all of these functions.

(Melissa): No, you'd have to add the grant to your portfolio first, and then you would have your privileges.

Woman: Okay, I think I understand. Thank you.

Coordinator: Next question comes from Northern Navajo Medical Center.

Woman: When I needed to do my Federal Financial Report the other day, I went to the Electronic Handbook, but I couldn't find it. I found the Financial Report that's due in January. And, so I was wondering why I didn't find that in Electronic Handbook?

Kelly Long: Can you give us your grant number? We can quickly take a look at it.

Woman: Yes, 81GRH00001.

Kelly Long: You can see some FFRs that were due in the past, but not current.

Woman: I saw past FFRs and then I saw two future FFRs, one due in January of 2014 and one due in January 2015, but nothing that was due October 30, 2013.

Kelly Long: Okay, it sounds like you might be confusing the Quarterly Federal Cash Transaction reporting at payment management, which was due October 30, for the quarter and ending September 30. That's through the Payment Management System, not through the Electronic Handbooks.

Then you have an annual requirement to submit the FFR to HRSA, which is through the EHB and, let's see, those deadlines are - January 30, 2013 was your last one.

Christopher Suzich: So, from the EHB perspective, I think you're all set, right Kelly?

Kelly Long: Yes.

Christopher Suzich: But, in terms of the Payment Management System, you may need to check that.

Woman: Yeah, I did it that, but after you were talking today, I go, oh, I'm supposed to do it in the EHB too? That's what I was thinking.

Christopher Suzich: Well, not the identical report, but similar.

Woman: Okay, all right, thank you.

Coordinator: Next question comes from the Hospital of the University of Pennsylvania.

Woman: Yes, hello, I have a question about the Division of Payment Management staff person, who I identified as related to my organization. And, I was just wondering when I would contact that person versus like the general help number. And also, I have another person that is identified on my NOA as a grant administration, so I'm just confused.

I know you mentioned several roles, but between a DPM staff person, who I see from my organization is (Anthony Holland) and then I have a Grant Administrator, (Barbara Ellis). Who would be the person, I guess, for financial questions.

Kelly Long: If it's financial questions, pertaining to your reported expenditures, the FFR that you're submitting through the Electronic Handbooks that would be your Grants Management Specialist, Barbara.

If it's related to your cash transaction reporting to the Payment Management System, that would be (Anthony Hollinger), DPM account representative.

Woman: Okay, so cash transactions through DPM. And then, secondary to that, (Anthony Holland), his phone number and email are here and what's the protocol for contacting these folks, like just sending an email and putting your grant number in the subject line. Like I don't know what the protocol for how timely they communicate back with you and different things like that. Can you give a little bit of explanation around that?

Kelly Long: The Payment Management System is operated and maintained by another operating division. So, I don't have their protocols. So, my recommendation would be to reach out to him, if you're having problems. The team leaders' names are also listed on the web site, under the contacts. So, I would reach out to them and ask those specific questions.

Woman: Okay. And actually can I ask one more thing, in reference to the lady before me who was speaking about the reporting date. My NOA says that the FFR report is due 10/30/2014 is that correct for a quarterly?

Kelly Long: It could be. It depends on the cycle of your grant program. If you'd like us to look up your specific grant number, you can provide it to us and we'll do a quick check.

Woman: Oh, sure, okay. The grant number it's UD7HP26041.

Christopher Suzich: Okay caller, we'll take a quick look at that, one second.

Kelly Long: You have that correct, so your budget period ended June 30, and your annual reporting to HRSA is due October 30.

Woman: So, next October 30, 2014?

Kelly Long: That's right.

Coordinator: Next question comes from Alaska Native Tribal Health Center.

Woman: Hello, my grant budget period ends August 31, of this year. And in September, I was trying to submit a prior approval to change my indirect costs, and so when I selected for last year's budget period, it allowed me to do that.

But, when I submitted the approval for the prior approval, it defaulted to this year's budget period and I can't seem to go to last year's budget period.

Christopher Suzich: Can you give us your grant number, caller?

Woman: Yes, that is H9CRH22850. And, I can give you the prior approval number, also.

Christopher Suzich: Let me just repeat that grant number, H9CORH...

Woman: No, no, CR as in Romeo, and another H, 22850.

Christopher Suzich: Okay, let us pull that up, one second please.

Melissa, we're thinking we need to contact this caller back, unless you have any other thoughts on it?

(Melissa): Right, no we'll go ahead and follow up with you. Can I get your name please?

Woman: My name is Charmaine, C-h-a-r-m-a-i-n-e.

(Melissa): And a phone number.

Woman: My direct office number is 907-729-2679.

(Melissa): Okay, thank you. We'll look into this a little bit further. And, we'll go ahead and contact you.

Woman: Wonderful, thank you very much.

Coordinator: Next question comes from Children's Hospital, Los Angeles.

Woman: Hi, my question is about roles in EHB. Right now, I am the Authorized Official for the account, one of the accounts, at least. But, my question is, the account I have right now, has several names on it that should not be in the account. And, I don't think there's an FRA, Financial Reporting Administrator, named in the account, who can delete or remove the names that are not supposed to be there or change the names to the appropriate roles.

Should I be listing or have the proper person in my institution to go ahead and create a - or go in there and log in and establish herself as an FRA. Or can I do that as an Authorized Official?

Christopher Suzich: (Melissa), do you want to answer that?

(Melissa): Yes, are you asking if you went to remove people that are no longer with the organization?

Woman: Yes that one, and then two, there are names there that I feel are not supposed to be, for example, there's name called (John Belind Fransella), who has an access of a Business Official, but he's not a Business Official. And there's another person that has that type of access that has Authorizing Official, but she is actually not the Authorizing Official. She is our CFO and her name is not supposed to be there at all. I don't know how she got there.

So, we want to fix that, so I tried to do that the other day, but I couldn't as an Authorized Official. And, when you explained about FRA, from what I understand, FRA is the person who can provide access and fix all those types of access in EHB, am I correct?

(Melissa): Well, the FRA they can grant privileges, but they can't fix someone else's role. Each individual is responsible for their own - how their organization role is listed. So, they should not be the Authorizing Official or Business Official for example, and should be other.

When you're logged into EHB, towards the upper right corner, you're going to see your user name and there is a drop down, and one of the options is to view/update profile. Those specific staff members should go in there and change their role.

Woman: Okay, so in the (unintelligible), should change their role, right?

(Melissa): Yes.

Woman: Okay, so the FRA cannot do that.

(Melissa): Right, right, each individual person has to change their role.

Woman: Okay, just wondering how they got there and got their access like that.

(Melissa): Yes, when they were registering a new EHB, they were able to choose their role.

Woman: Oh, okay.

(Melissa): They can just go ahead and update that. And, in fact, probably a better way to do it is just to go to the organization's tab in the EHBs and there should be an option right there to update my role, where they can just check off the correct role. It's going to be the easiest.

Christopher Suzich: Now, (Melissa), maybe it would help our callers, if a person has left an organization for instance, or is no longer at a certain organization, but they still have an existing role in the system, how would a grantee user go about modifying that person's role?

(Melissa): If someone has completely left the organization and they shouldn’t be associated with the organization anymore, then the Primary Authorizing Official can actually remove users from the organization.

To do that you would click on the organization's tab, and then click on the organization folder link, and then from there, there's a user's link on the left and that will bring up a list of the users in the organization. So, you would be able to check off any privileges they have, like users or any organization - I should say any organizational privileges, not grant privileges.

But, there's actually, like when you're looking at the users in the organization, there's a link that says update privileges, and next to that, there's a triangle. One of the options is to remove users.

Woman: Oh, okay.

(Melissa): That's just to remove users from an organization.

Woman: Can I do that, being the Authorized Official?

(Melissa): You may be able to. It depends. I'd have to take a look at that. Can I get your name and number and I'll call you back?

Woman: Sure, my name is Riza, R-i-z-a and my phone number is 323-361-4661.

(Melissa): Okay and could I get your grant number as well?

Woman: Sure, it's T73MC00008.

(Melissa): Okay, I'll go ahead and I'll look more into the account, your account, and the privileges you have and I'll contact you.

Woman: Thank you very much.

Coordinator: Neighborhood Health Centers of the Lee Valley, you line is open.

Woman: Hello, I'm calling because or I have a question regarding the FF425 that I just submitted in October. I put something on the Federal Share of Unliquidated Obligations, because there was funding that we have earmarked to purchase an EMR, Electronic Medical Records System.

And, I guess what I'm wondering is, how do I fill out the report, when it's been purchased. Do I need to complete another one of these? This is an annual report for us.

Christopher Suzich: One second, please caller. Can we get your grant number, caller?

Woman: Yes, my grant number is H80CS24158.

Kelly Long: And, did I get the situation correct, that you submitted the annual FFR, October 30, and you reported unliquidated obligations?

Woman: Correct.

Kelly Long: Okay, was that accepted or no?

Woman: I believe so, because I talked to our Grants Management Specialist prior to doing this, and was instructed on how to do this.

Kelly Long: Oh, okay. So then, can you repeat your question then for me, again?

Woman: Well, I don't know what I need to do, once these funds are utilized to purchase the EMR system. Do I need to complete another report, showing that these unliquidated obligations have been spent or I don't know? What's the next step?

Kelly Long: Yes, okay, so I think I understand. So, yes, once you do liquidate those funds, you can go back into the Electronic Handbooks and revise your financial report, showing those expended.

Woman: Oh, so you just revise the existing report that I've already submitted.

Okay, and how many months do I have to spend these unliquidated obligations?

Kelly Long: You have 90 days from the budget-period end date.

Woman: Ninety days, okay, well we have two budget periods. It was a two-year project grant. So, would it be 90 days from the end of the second year, because, these funds were from the first year?

Kelly Long: Yes, 90 days from the end, yes.

Woman: Well, which end? The first year and/or the second year end.

Kelly Long: Well, let me look up your...

Woman: Well, actually the first year-end was May 2013. And the second budget period ending date is May 2014.

Kelly Long: So, you've already submitted your report. So, you're beyond the liquidation.

Woman: The report was due October 30.

(Helen): Yes, I'm looking at it Kelly and it was accepted and I see $62,000 unliquidated.

Kelly Long: Okay, okay, so reach out to your Grant Management Specialist. If you have a timeframe where you expect to liquidate those funds, it's best to request an extension of that liquidation period, because you are beyond that.

Woman: Oh, I wasn't told about that. Okay. So, it really was a 90 days from May 2013.

Kelly Long: That's right.

Woman: Okay, that's my only question.

Christopher Suzich: Thank you caller.

Coordinator: Next question comes from the New Jersey Department of Health.

Man: Hi, I have a question about the Field 6 on the 425, the timeframe. I did an annual report without obligations and I got an error message that says that this is an error, please update the option on the (unintelligible) quick save and continue.

I submitted it as a file report, because it didn't have obligations. So, I just continued. And after that, I got notices from HRSA saying that I should have chosen the interim option, instead of final option, even though I had no obligations on it.

So, I never encountered that error before, and I was just wondering why I got it this time.

Kelly Long: Okay, so you submitted a final report.

Man: Without obligations.

Kelly Long: Okay, so a final report is defined as the last budget period within your document. That's when we would expect for you to submit a final report.

Man: So, it's the last budget period under the project period.

Kelly Long: It's the last budget period of the document number or the segment of the grant. Can you provide us with your grant number? And, and we can look up the specifics for you.

Man: Okay, the number's 6H61MC23641-01-01

Christopher Suzich: Okay, one second, sir.

Kelly Long: Okay, so you're on the cycle of April 1.

Man: Yes.

Kelly Long: Okay, so April 1, 2012 was when you first received the award. And that's probably the report you just submitted right, because your budget period ended March 31, 2013.

Man: Right.

Kelly Long: Okay, so that would have been an annual report. We wouldn't expect for you to submit a final report until the end of your project period, which is March 31, 2015.

Man: Okay, so instead of submitting it as a final, I would submit it as an annual.

Kelly Long: Right, up until the last year of that document.

Man: So, it's the same for all HRSA grants.

Kelly Long: Yes.

Man: Okay, that answered my question. Thank you.

Coordinator: Turner County Board of Education, you line is open.

Woman: Yes, my question is would you repeat the number for the call back or the recording of the conference call. I missed the last four digits.

Christopher Suzich: Operator, can you provide that please?

Coordinator: The toll free number?

Woman: Yes, please.

Coordinator: 866-448-5647.

Woman: 5647, okay, those were the numbers I missed. And then, the other number was 203-369-1189.

Coordinator: Correct.

Woman: Thank you.

Coordinator: Our next question comes from HRSA.

Christopher Suzich: Go ahead caller.

Coordinator: We'll go to the next question, Colorado Rural Health Center.

Woman: Yes, hello, I have a question. We're applying for a grant in partnership with another organization. And, the other organization is going to technically be the grantee. They're applying under their EIN. But, here at our organization, I will need access to the financial reporting duties. So, if we're awarded this grant, would we be able to add that to my current EHB log in, or would I have to get a separate log in?

(Melissa): No, you have one log in and have multiple (unintelligible). You would just have to add the grant to your portfolio once it was awarded.

Woman: Okay, great, thank you.

Coordinator: California State University, you line is open.

Nancy McCarty: Yes, hi, I have a question about getting the Project Directors changed on my Notice of Award. And, I emailed back in July, July 30, and I haven't heard anything back. How will I know when that gets fixed?

Christopher Suzich: You should have heard something by now, caller. Can you give us your grant number?

Nancy McCarty: E4CHP26120

Christopher Suzich: Let me repeat that, E like egg, 4, C like Charlie, HP, 261...

Nancy McCarty: 20.

Christopher Suzich: Let me get your contact information. We'll have to track down that request and have somebody give you a call back, and your name and number.

Nancy McCarty: Yes, Nancy McCarty at 916-278-6020.

Christopher Suzich: And, you said you emailed somebody through EHBs or separately?

Nancy McCarty: HRSA. I emailed HRSA, I mean, (Lisa Walsh) or (Liam Gillis), (Chris Rolso).

Christopher Suzich: Yes, yes. Okay, so you're waiting for a response on that. Okay, we'll have somebody...

Nancy McCarty: Usually I get a new award letter, just telling me.

Christopher Suzich: Okay, we'll have somebody get back to you on that, Nancy. Thank you.

Coordinator: United Way, your line is open.

Woman: Oh, I have a question also on the reporting period. Mine says within 120 days of award issue date. And, our issue date is August 13, but the project period is August 1. So, is our report due on which date, it says performance report and include financial forms, project as (unintelligible), grant summary and performance measures.

Christopher Suzich: And, do you have your grant number handy?

Woman: It's H25MC26227.

Christopher Suzich: I think that's - I guess you're reading off your NOA or reporting requirements?

Woman: Yes, we just got the award.

Christopher Suzich: And I think, I don't think that's the financial report. It sounds like it's a programmatic report.

Kelly Long: Yes, it sounds like the performance report.

Woman: Okay, well it just says this report should include completing the financial forms.

Kelly Long: Yes, it's performance reports for these grants. They have various forms on them. I think it - does it say like 90 or 100 days after the budget period starts?

Woman: No, it says within 120 days of award issue date.

Kelly Long: Oh, okay. So, yes, that's the performance report and it's going to have various forms you would fill out. I'm not sure when it would be available in the EHBs. The contractor usually (unintelligible) some sort of job and they create the reports, probably 30 days before the deadline.

Christopher Suzich: So, you will enter EHBs to complete those and submit those forms, caller, but it doesn't have anything to do with SF425 forms we talked about before.

Woman: Okay, I'm sorry. It does or does not include financial information that needs to be provided.

Christopher Suzich: Well, there might be financial information that's just very specific for that program, but it's not the financial information that you heard us speck about on this call earlier.

Woman: Okay, because on our award, we have NA in the subaccount code.

Christopher Suzich: Okay, so your award is not subaccount to EF, so you're okay from that perspective.

Woman: Okay, so we're the pooled account.

Christopher Suzich: That's correct.

Woman: All right, but again, is the 120 days from the early product period start or when we actually got notified? Because, we didn't really start when the project period started on August and we got issued the award on August 13.

Christopher Suzich: I think it's 120 days from the date listed as the issue date. But Kelly...

Kelly Long: The budget period start date.

Christopher Suzich: Budget period start date, that when the 120-day clock started for you, caller.

Woman: Okay, so that is the earlier date then, of August 1.

Christopher Suzich: Do you see that reporting requirement, is there a place to add in EHBs for your grant that you could go in and click on to begin to submit that information?

Woman: It just has this performance report must be submitted using an Electronic Handbook.

Christopher Suzich: Right, right, so you should, I think, (Melissa), if I'm not mistaken, the caller would go under their pending tasks tab, is that right?

(Melissa): Yes, once the report's created, it would be in the tasks tab. Sometimes I like going to, after the tasks tab, I prefer submissions (unintelligible). I think it's just an easier view.

Woman: I'm sorry. Say that again, which view?

(Melissa): Submissions, like when you go to the task tab, you're going to see a left side menu and one of the links is submission. I prefer that. I think it's an easier view. But, in any case, once the report is created, that's where you'll see it.

Woman: Well, today's November 1, so would there be a chance it's in there, if it's due November 1.

(Melissa): The December 1, sure.

Christopher Suzich: It should be there for you already, caller.

Woman: Okay, thank you.

Coordinator: Once again, to ask a question, please press star then one. Next question comes from Seattle University.

Man: Hello, my question is when we submit a financial report do we have to attach the performance report?

Christopher Suzich: No, is the short answer. I don't know if any of the other speakers want to expand on that at all.

Kelly Long: No, generally performance reports are separate from the financial reporting.

Man: Okay, you mean, so when we submit a financial report, we just submit it, the financial section only. We don't have to put a performance attached with the financial report?

Kelly Long: No, they're not attachment with the FFR, unless your NOA has specific instructions for you to attach additional information.

It would be the FFR data.

Coordinator: Next question comes from New York UN.

Christopher Suzich: Go ahead caller.

Woman: Hello?

Christopher Suzich: Yes, go ahead.

Woman: Hi, we have two grants. A training grant (unintelligible) 2HP222388 and we wanted to know if there is a place where you have the type of appointment for them, like NIH does.

Christopher Suzich: I'm sorry I didn't understand that question. Where we have a...

Woman: A statement of appointment.

Christopher Suzich: Statement of appointment.

Woman: For training.

Christopher Suzich: Once second please. I'm sorry, Melissa, unless you're familiar with that term, nobody here is familiar with that term.

(Melissa): We would have to look into it.

Woman: Okay, because we have a T32 grant that is funded by HRSA.

Christopher Suzich: And you saw this term on the NOA, am I right caller?

Norka Rappaport: No, actually we have from NIH we have ordered training grants and all those training grants, when you appointed trainee to the training grant, you go ahead and process a statement of appointment through their eCommerce system. And, I'm wondering if HRSA, having also training grants, have a similar system?

Kelly Long: If that was a requirement, it should be stipulated on your Notice of Award, but since we don't have anyone here from our Health Professions area, if you could, please give us your name and telephone number and we will ask them this question and then call you back.

Norka Rappaport: Okay, my name is Norka Rappaport.

Christopher Suzich: And you're phone number?

Norka Rappaport: Is 646-754-4671.

Christopher Suzich: Okay, we'll have somebody get back to you.

Woman: Okay, hi, this is (Marielle) from (unintelligible) with a second question. It's kind of more of just a general question regarding a grant application. We have a construction grant and we need to submit a letter of commitment. I guess one of our questions is, is there a standard template or format for that or is it just a freestanding letter that we have to send in? And, what kind of information would be required on the letter?

Kelly Long: Now, if there was a standard template, that would be in the Electronic Handbooks for you to download. And, as far as the information for it, that should be stipulated within the Notice of Award, of what they want to see. If it's not there, you can reach out to your program official or the Project Officer that is listed on your Notice of Award.

Woman: Okay, is there - we've been trying to contact them today. We haven't been able to get in touch with anyone, because this is due on Monday, and we needed to get some clarification. Is there anyone else that we can contact?

(Helen): Kelly, this is (Helen). On the construction grant, there is no template for the letter of commitment. I know it's a condition on the award. The best person to contact would be the Grants Management Specialist whose name is on your Notice of Award.

Woman: Okay, thank you very much.

Coordinator: Next question come from Northern Navajo Medical Center

Linda Knedler: Yes, so my question is prompted by a previous caller. We're a very small program. And, I do most of the work on the grant. And, I was given the organizational role of AO, when the primary AO left. I was later assisted in getting assigned for approving and submitting financial reports.

But, after the conversation earlier, I'm going to need to assign other people the financial duties, in case I'm not available. And, how do I get myself assigned to be the primary AO, instead of just the AO. The primary AO has left the organization.

Christopher Suzich: Can we get your name, caller?

Linda Knedler: Linda Knedler.

Christopher Suzich: We'll look up your grant and see what roles we can see for you. Your grant number?

Linda Knedler: H1GRH00001

Christopher Suzich: That's right. It was on a different page. You gave us that before didn't you?

Linda Knedler: Yes.

Christopher Suzich: And I'm sorry, your last name again, Linda? Knedler, K-n-e-d-l-e-r. (Melissa) can you look that up?

(Melissa): Yes, it's probably something I'm going to need to contact you about separately. So, can we get your number as well?

Linda Knedler: Yes, 505-368-7392.

(Melissa): Okay. Let me look up your roles and privileges and I'll go ahead and contact you.

Linda Knedler: All right, thank you.

Coordinator: Next question comes from Community Healthcare, Tacoma.

Woman: Hi there, my name is (Evelyn) and I have a question. We're a first year grantee. And, I started my position as the Program Coordinator, (unintelligible), I think it was 11/1 to the year one, and we have two grants.

We recently hired the CFO. And, I know she came to see me because our FFR report is due. She's just very new to this position. Is there a way to get an extension for this?

Christopher Suzich: Do you have your grant number handy?

Woman: Yes we do. It is H76HA24727.

Christopher Suzich: So, you're enquiring about an FFR extension.

Kelly Long: Yes, you should be able to log into the Electronic Handbooks and there would be, (Melissa) if you want to help give her some instruction on where that would be, there's a drop down for you to request that extension.

Woman: Can I give you the other grant number? We attempted to do this yesterday and I'm in my EHB right now, but I did not get a confirmation. I didn't get an email saying it was approved, denied or if it went through. I can give you the other grant number that we filed it under.

Christopher Suzich: Go ahead.

Woman: H12HA24794.

Christopher Suzich: Did you need an extension for both grants or just for the H12?

Woman: No, for both.

(Melissa): That was for the H76 grant and that looks like it was extended until December 16.

Woman: It did go through. Okay.

(Melissa): Okay, I can check the other one here.

Christopher Suzich: The H12HA24794. One second.

Coordinator: Next question comes from Southern Nevada Health District.

Woman: Yes, I think probably my questions have been answered mostly. So, if someone has left the organization and that is the Authorizing Official, whenever I need to extend the project director the invitation to the new individual that's taking over for them to update their role, in the EHBs, and then that person can go in and remove individuals from the list, correct?

Christopher Suzich: I'm sorry, caller, one second. I was still caught up on that H12 question that we were trying to complete. One second.

(Melissa), did you, in the event that that H12 caller is still on, did you find anything out?

(Melissa): Actually, it's still pending, with their Grants Management Specialist. For the previous caller, I do see that the request went through, so the Grants Management Specialist is probably going to make up his decision on that shortly.

Christopher Suzich: Okay, so that was for Evelyn. You should hear something shortly on your request for the FFR extension on the HR grant. If you don't you'd want to follow up with your Grants Management Specialist. But, it sounds like you've done everything you could so far.

Thank you (Melissa).

(Melissa): Now for this question about roles and privileges. One thing I wanted to clarify, there are grant level privileges and organizational level privileges. So, the grant level privileges are just like for people that are working on the grant or whatnot.

Organizations, you know they can be registered, especially for a large organization, you may see someone who is registered to an organization. But, they might be working on a different grant. So, you'd want to use caution before putting someone from an organization, especially if it's a large organization.

But, in this example, were you interested in adding a Project Director, you said?

Woman: I am the Project Director. But, we've had a change in our Authorizing Officials a couple of times. So, I need to send the invitation to that- to whom that new individual will be, for them to register and attach themselves to our grant, correct?

(Melissa): There's no real way to like send an invite through the EHBs. You would just have to communicate that with them. Maybe email them or whatnot, to tell them they should set up an EHB account. And, during their registration process, they can choose the Authorized Official role.

Woman: Okay, and I also see someone that's listed with active account status, and it's an employee that's no longer here. The Authorizing Official will be able to remove that person, right?

(Melissa): Right. If someone's not with the organization at all, the Primary Authorizing Official can go to the organization folder and just banish the users from there, at the organizational level.

Woman: Okay, all right. Thank you.

Coordinator: Are we ready for the next question?

Christopher Suzich: Yes, please.

Coordinator: University of California, San Francisco.

Man: Yes, thank you. This is Jerry. I recently took over as the Project Director for about eight grants. They're health profession loans, loans for disadvantaged students. And, my question is just about the timeline. I just submitted our performance reports that were due in October. And, now I just wanted an idea of what comes next. Is there a financial report that comes after this?

I also want to have a sense of a Notice of Award, what's the timing of knowing when we would get additional funds, if we are eligible for additional funds and how I would be notified if we do get more funding.

Christopher Suzich: Can you give us one or two of your grant numbers, sir?

Man: One is E4CHP14931.

Christopher Suzich: Okay and all of your other ones do they start with E something?

Man: Yes.

Christopher Suzich: So, the loans program operates a little differently from our grants program. But, you did receive an NOA correctly. That's what you said?

Man: I haven't yet.

Christopher Suzich: Okay, but I think you submit an annual report that's due at the end of July, is that right?

Man: That's correct.

Christopher Suzich: Okay. And, I think that is the only requirement for your particular program. And based on that, a Notice of Award is typically generated, I think with an issue date of October 1.

Man: And that Notice of Award is telling me what?

Christopher Suzich: That Notice of Award would tell you if you received additional funding and when that budget period would start.

Man: So, I should have received a Notice of Award already. Can you tell me how I retrieve a Notice of Award?

Christopher Suzich: Your organization, the people registered in the EHBs would electronically receive that NOA via email. And then, the NOA would also be available in your EHBs account.

Man: So, I would receive a Notice of Award from whomever the contact person is at HRSA. And, it would be an email of Notice of Award attachment?

Christopher Suzich: That's right it would be a .pdf. It wouldn't be from an individual. It would be system generated.

Man: I see, so if I haven't received anything at this point, that probably means that I'm not getting any new funding.

Christopher Suzich: That would be my assumption. But, without getting into your specific award, I wouldn't want to go further than that. I don't know if anybody wants to add anything.

(Melissa) did you want to add anything to that?

(Melissa): No, I don't have anything else to add.

Christopher Suzich: All right. Does that answer your question?

Man: Yes, that was helpful. Thank you.

Coordinator: Next question comes from AIDS Healthcare Foundation.

Woman: Hello, I have a question for you all. Did you submit further financial reports, which was annual financial report through Electronic Handbooks, and we're waiting for approval because we cannot submit our expenditure report, as it's not approved yet. How should we find out if it's approved or not?

Christopher Suzich: Do you have your grant number handy?

Woman: Okay, yes, sure, H76HA24724.

Christopher Suzich: So, you've already submitted your FFRs through EHBs, correct?

Woman: Yes, more than a month ago, we submitted right on time, the end of September.

Christopher Suzich: Okay, one second please.

One second, caller.

Woman: You were inquiring about the expenditure report that's due November 27?

Woman: Right, but I cannot submit it until our FFR's approved.

Kelly Long: Okay, I see that your FFR was submitted. So, the one that was due October 30, that was submitted back in September and that was excepted by your Grants Management Specialist.

Woman: It's been accepted which means that we can submit our expenditure reports, right?

Kelly Long: Yes.

Woman: Okay, thank you so much.

Christopher Suzich: Next question Angela.

Coordinator: Next question comes from Georgia Health Science University.

Woman: Yes, good afternoon. I work in the College of Dental Medicine. And, we were awarded funds for the Part F Dental Reimbursement Program. Can you please just clarify for me if the FFR and/or the progress report are required for the Dental Reimbursement Program?

Christopher Suzich: Do you have your grant number handy?

Woman: I did. The grant number is that correct? Yes, T22HA26456.

Christopher Suzich: And when the budget period start? Do you have that in front of you?

Woman: Yes, it started July 1, 2013.

Christopher Suzich: One second please.

So, your question is when do you need to submit your FFR, is that it?

Woman: Well, is it even required for the Dental Reimbursement Program, specifically?

Kelly Long: You do not have an annual FFR reporting requirement. And, I'm checking to see if you have the quarterly in Payment Management. You don't have the annual reporting requirement to HRSA. But, you still have the quarterly reporting to Payment Management that must be done. And, it looks like you're up-to-date on that.

Woman: And, our internal office handles that, internal grant office, so that's good to know that they are actually doing that. Can you tell me whether or not the progress report that was mentioned in the call, is something that pertains to the Dental Reimbursement Program?

She mentioned Block No. 13 on the NOA, and ours says not applicable.

Christopher Suzich: Is that the sub-accounting box that we talked about? If there's no number in there, than your grant isn't sub-accounted, so you don't have to worry about it.

Woman: So, the progress report that was mentioned does not apply either, and not the annual report, either.

Christopher Suzich: The progress report, you're other requirements related to programmatic progress reports would be listed on the terms and conditions and reporting requirements on your NOA.

Woman: Okay, I could not find any reporting requirements, so that's why I just wanted to get clarification from you.

Kelly Long: I'm looking at your NOA and I don't see reporting requirements.

Woman: Okay, so only the quarterly reports to the PMS, through the PMS system or to the PMS system have to be made. And, we're up to day.

Kelly Long: That's right.

Woman: Thank you so much.

Christopher Suzich: Our next call, Angela?

Coordinator: Our next question comes from Ke Ola Mamo.

Woman: Hello, I have a question on the - to print out reports. How can I print out or find a report that I already submitted. I recently submitted FFR reports. But, after I submit it, I cannot find the report anymore. And, I cannot print it out.

(Melissa): Okay, I think the best thing to do to find a submitted report, is to go to the task tab. And, I think you can go to the submissions link on the left. From there, there's an all tab and what you can do, is enter your grant number and click on search. And, it should bring up the reports that you've submitted which you can view it and you should be able to print as well.

Woman: Oh, okay. I will need to try that then. Because, I think I tried that and didn't come out with anything. So, I go to tasks and is there a submission.

(Melissa): Yes, it's on the left side menu and then from there, there's an all tab that you can enter your grant number and click on search.

Woman: Oh, okay, I'll try that, because my computer is kind of slow right now.

Christopher Suzich: Okay, is that it caller?

Coordinator: Next question comes from Fred Finch Youth Center.

Woman: Oh hi. I have two questions, one is generally when requesting an extension, do you request the extension from the due date or from the date of the request.

Christopher Suzich: An extension for your FFR?

Woman: Any extensions under the grant requirements, some of the different reporting requirements and submissions. For instance, we have to submit the general contractors contract bid. It's been put off a bit, but it's more than 60 days, but I got a notice back to request only a 60-day extension.

(Melissa): So, it would be a 60-day extension on the deadline.

Woman: On the actual deadline. Okay, on or before the actual deadline, okay.

The second question I had, going back to the subaccount code, when I first listened, I thought you said that it applied to, where did my notes go, new and competing...

Christopher Suzich: Continuation awards.

Woman: Continuation awards, that were fiscal...

Christopher Suzich: Fiscal 14, definitely and maybe Fiscal 13, depending on your specific program.

Woman: Okay, because I do see a subaccount code, but I didn't know what I was supposed to do with it. So, now I do. Can you just confirm that we are subject to that, if I give you my grant number?

Christopher Suzich: Go ahead.

Woman: It's C as in Charlie, 12, C as in Charlie, S as in Sam, 25582.

Christopher Suzich: Helen, is C12 your shop?

(Helen): Yes, it is.

Christopher Suzich: And they're all subaccounts here, right.

(Helen): C12, yes, they are sub-accounted.

Christopher Suzich: Caller, so you're correctly sub-accounted when you go to drawdown your funds in PMS, you'll have to provide that subaccount code.

Woman: Got it. Okay. Thank you.

Christopher Suzich: Do you want to add anything to that Kelly? No. I think that's all you need.

Woman: Okay, thank you.

Coordinator: Next question comes from Child Development Division of RWBT.

Christopher Suzich: Go ahead caller.

Coordinator: We'll go to the next question, Texas Department of State Health Services.

Woman: Yes, hi. You mentioned that the subaccount can be found at the bottom of the NOA. And you also mentioned two other ways to find it. Can you repeat that?

Christopher Suzich: Well, we can give you the specific block number. I'm sorry. I just didn't have an NOA in front of me. (Melissa) do you have an NOA. Can you bring an NOA up?

(Melissa): Sure.

Christopher Suzich: (unintelligible) on there has a number assigned to it, I believe.

(Helen): The sub-account code is at the end.

Christopher Suzich: Does it have a block number, (Helen)?

(Helen): No, it's under 17 and 19, 17, 18 and 19. There's a row there and at the very end of the row is a subaccount code.

Christopher Suzich: Okay, so that's where you would find it caller.

Woman: Okay, but I think it was mentioned that you can identify it by looking at the last digit, am I correct?

Kelly Long: That's if you know your payment management system account number. If you know that, the last character of your account number will identify whether it's in a pooled account or some sub-account. So, if you have an account number that ends with P as in Paul or B as in Boy, that's a subaccount.

Woman: P or B, okay.

Christopher Suzich: P like Paul or B like boy.

Woman: Okay, all right, thank you.

Coordinator: Next question comes from Nebraska Methodist College.

Penny James: Yes, I have a couple of questions. I'm not the one responsible for drawing down funds on PMS. So, I just want to make sure, if our grant programs are subject to the quarterly FFR reporting. And, if so, how do we find out what dates those are due?

Christopher Suzich: Go ahead. Do you have your grant number?

Penny James: Yes, we have two. The first one is E4CHP26144.

Christopher Suzich: And, is the next one also an E4C?

Penny James: No, it's an E01.

Christopher Suzich: Go ahead.

Penny James: E01HP25854.

Christopher Suzich: One second, please.

So, your question are either or both of those subject to the quarterly PMS reporting requirements.

Okay, one second.

(Melissa), were you able to bring up either one of those? I'm sorry, how about the E01? We're checking on this one caller, they're both - they're somewhat different. The E4C is part of the loan program. But, the E01, I think, is treated differently.

Kelly Long: Caller, can you repeat your grant numbers.

Penny James: Yes, E4CHP26144 and that's a nursing student loan. The other one is E01HP25854 and that's a nurse-faculty loan program.

Kelly Long: I was trying to look them up in Payment Management for you, to help identify, but I cannot seem to pull them up for some reason.

Can I get your name and telephone number?

Penny James: Yes, my name is Penny, P-e-n-n-y, James. My direct number is 402-354-7225.

Christopher Suzich: Okay, we'll have to get give you a call back, Penny.

Penny James: Okay. I did have one other quick question. The nurse-faculty loan program, the performance report was due a few weeks ago. How do we tell if that report was accepted? Or, what stage it is in review?

Christopher Suzich: Let's see, that's admissions and then...

(Helen): Probably better, like if you submitted it, if you wanted to know the status of it, it's probably best if you contact your Project Officer, listed on your NOA.

Penny James: Okay.

Christopher Suzich: Their name should be at the very end of your NOA with their contact information.

Penny James: Okay, I'll do that. Thank you.

Coordinator: Next question comes from UNC, Mental Health.

Christopher Suzich: Go ahead caller. Do you want to check your mute button, caller?

Woman: Hi, I had a question, similar to the last one. Is I'm a relatively new grantee and I just didn't know anything about the Payment Management System. I've been registered in EHB. And, so I just wasn't sure, if that's something that my institution is taking care of for me or if I have any requirement for that.

Christopher Suzich: Do you have your grant number, caller?

Woman: R40MC26197.

Christopher Suzich: R40MC26197?

Woman: Yes.

Kelly Long: You will have annual and quarterly financial reporting responsibilities, and your expenditure reporting to HRSA and your disbursement reporting to Payment Management. So, whomever in your organization has the responsibility for the financial, would have to make sure that they're submitting those reports.

Woman: Okay, and then, so then do I need to set up like register with the Payment Management System?

Kelly Long: Yes, whomever has that financial responsibility would need to register with Payment Management.

Christopher Suzich: What is your role on the grant, caller?

Woman: I'm the PI, the Public Director.

Kelly Long: Okay, generally the PI does have that responsibility, but again, it's within the however your organization sets it.

Woman: Then, is that something that I can check or - we started 9/1. So, I didn't know if we would have a quarterly report due already. Or, is that something that I just check in with my financial person and see if they've been completing whatever needs to be completed?

Kelly Long: Yes, check with your financial person. But, if you have an award that began September 1, there would be a quarterly report due for the first 30 days of the grant.

Woman: Okay, so is there any way for you to check, to see if it's already been done or I just need to check, or if we have any delinquent.

Christopher Suzich: You're asking about the R40 grant number that you just gave us, right?

Woman: Yes.

Christopher Suzich: Okay, we'll see if we can bring that up quickly. But, as Kelly mentioned, there would have been a requirement for the first 30 days and that would have been due, I think, October 31.

Woman: Right, so as the PI, because I don't take care of the financials, then I did not get it - I wouldn't get any notification about that, the finance?

Christopher Suzich: Unless you also have those financial roles. But, here, I think we have an answer.

Kelly Long: Yes, generally within the university's, there's a business office, a grants contract business office that has those responsibilities. And, they have submitted the report for the quarter, September 30.

Woman: Oh, okay, so they do everything. Okay, thank you very much.

Christopher Suzich: Next call.

Coordinator: Next question comes from Hamakua Health Center.

Woman: Yes, may I ask a couple of questions on my BPR?

Christopher Suzich: Yes, go ahead.

Woman: Okay, great. The first question I have is regarding the performance measures start and end date timeframe. What timeframe should we use? Is that for our next period, up and coming, so 3/1/2014 through 2/28/2015?

Christopher Suzich: Can I get your grant number?

Woman: Certainly. (Unintelligible)

Christopher Suzich: I'm sorry.

Woman: H87... Hello?

Christopher Suzich: I'm sorry you were breaking up there. Could you start over?

Woman: Sure, it's H80CS70451.

(Helen): Questions about your performance would have to go to the Project Officer. And your performance measures, that's a question for the Program, so you'd have to go to your Project Officer, who's listed on your Notice of Award.

((Crosstalk))

Woman: Okay, so it's not specific per your grant. You actually - it's a random timeframe?

(Helen): I don't know. That's why you need to check with Program on that.

Woman: Okay, what about your projected staff. Do I also need to ask them that too?

Christopher Suzich: Yes.

(Helen): I believe so. Because, if you got instructions, did you get the instructions for your BPR?

Woman: Well sure, but the instructions for the BPR are general, right? They're not specific to you?

(Helen): That's true, that's true. Yes, it's for everyone who's submitting the BPR (unintelligible).

Woman: So, it doesn't state, the numbers that were used last year, because the BPR has changed, the timeframes that are used this year are very odd period. It doesn't coincide with our fiscal year nor does it coincide with our grant period.

(Helen): How about UDS reporting, might it coincide with that?

Woman: No, it doesn't coincide with that either. It's basically a middle of the year date from July 1 through June 30, whereas our grant period is from 3/1 to 2/28 and we're on a calendar year. And, our UDS is also calendar.

(Helen): You'll have to check with the program office.

Woman: Okay, perfect. I'll check with her.

Coordinator: Next question comes from St. Louis University.

Man: Hello, I have a question in the EHB. We had submitted our program report and all the information. And, I've got one indication in terms of in EHB that I'm late on a report.

Christopher Suzich: Do you have your grant number, sir?

Man: Yes, one second. Sorry, I timed out on my log in here. You want the grant number?

Christopher Suzich: Yes, please.

Man: Okay.

Christopher Suzich: And, is your question, which report are you late on?

Man: No, the one that says I'm late on is the one I think I submitted on October 11. And, I want to make sure that was actually received.

The grant specific number is D19HP19029.

Christopher Suzich: So, you submitted a progress report in October.

Man: The performance report was submitted October 11, the huge one with all the numbers. And when I go into my EHB, it comes up that I'm late in submitting that by 21 days, that it wasn't submitted.

Christopher Suzich: One second please.

(Melissa): I think it's marked as late. I see it was returned back for changes. It was actually just send back yesterday.

Christopher Suzich: So it was sent back yesterday to that organization. Can you see the individual that it was sent back to, (Melissa)?

(Melissa): It wasn't sent back to a particular person.

Christopher Suzich: Okay, I'm sorry, it was just sent back.

(Melissa): Yes, just sent back.

Man: I can check with our grants management. So, it was sent back requiring changes or corrections or...

(Melissa): Yes. It was sent back for changes requiring some sort of change, but it doesn't say what in the system. You might want to contact your Project Officer listed on your Notice of Award to what changes need to be made.

Man: Okay, great. Thank you very much.

Coordinator: Next question comes from Sage College.

Okay, next question comes from the University of Cincinnati.

Man: Hi, I have a question on our performance reporting. And, this was on the individual level data form, which is the IND-GEN and in that form, they request the ethnicity and race of the awardees. And, it says that if the student is not reported that we are responsible for updating this field by the next reporting period. And, some of our students just won't give us that information.

So, I'm a little concerned. They didn't complete the information when they applied to the University and when we requested it to complete this report, they did not provide it either. So, I'm a little concerned that we're not going to have this information for the next performance report either.

Christopher Suzich: I'm sorry caller. You have a bunch of grant experts on the call today. But, we don't have any Programmatic experts that would be able to answer that particular question, because that is a program specific form. Do you want to go ahead and give me the grant number?

Man: E01HP24622.

Christopher Suzich: I think the best person to answer that would be the Project Officer. Have you tried the Project Officer contact information on your NOA, sir?

Man: I've spoken with him previously, on another issues, but not on this. But, I was on a call last week for another HRSA funding mechanism and they talked about the same thing, about reporting the race and ethnicity and that we needed to do that before we were funded in that mechanism as well. So, it's probably a bigger problem. Like we have (unintelligible) and it's the same for both of them and we're on another call last week for a third grant and we were told that we would need to report that information there as well. So, it's probably more of a HRSA decision.

Christopher Suzich: Yes, that's a HRSA question, but it would be somebody in the Program Office that would need to answer that. Hold on one second.

I'm sorry. We're not going to be able to answer that one. I'd have to refer you to your Project Officer, sir.

Man: Okay. Thank you.

Coordinator: Next question comes from Imperial Beach Community.

Christopher Suzich: Go ahead caller.

Glen Conerty: Hi, how are you today?

Christopher Suzich: Fine thanks.

Glen Conerty: My name is Glen, and I'm calling and I don't know if you guys are the correct people to ask about this. But I have some on EHB. I've got some items on my task menu that are showing. One is showing as a financial report. The other one is showing as like a, well that's something else. Yes, I know what that is.

But, they're showing with no deadline and what happened this past year, when I did my financial report in April, I tried to get rid of this and it brought back the previous ones, back to me and I had to resubmit them again. But, I'm still showing a - it's still shows as an NA, not applicable, deadline. But I'm kind of afraid or apprehensive to go into it again, because it's going to bring back other ones and show me as being late again, because that's what ended up happening.

Christopher Suzich: Is it all one grant, sir?

Glen Conerty: Yes.

Christopher Suzich: And the grant number.

Glen Conerty: It's H80CS06648.

Christopher Suzich: (Helen) are you still there?

(Helen): I'm sorry, say the grant number again?

Glen Conerty: It's H80, C as in Charles, S as in Sam, 06648.

(Helen): And, it says that things are not applicable yet?

Glen Conerty: Well, it says on the task, on the pending tasks are not completed. It says that it's not applicable, that there's no deadline or due date. And, what happened is, is when I was in here and I submitted my FFR during April, I believe it was of this year. I tried to clear this out to get rid of it. And then, after what it did is it brought back into my EHB the FFR that I had already submitted and I had to resubmit it again and then it was showing as being late at that point.

And so, I don't know how to clear this off of here or if this should even be in here, because I don't want to go into it again, like I don't want to go into the start, because I don't want to bring all of the stuff, the previous stuff back to me again. It's some kind of a technical issue, I believe.

(Helen): So is it that the FFR, that you did back in April that's still showing in your pending task list?

Glen Conerty: Well, when I went into this the last time, it has like three of them in there. It has like last year and the year before and I think the year before that. But, as I said, I don't want to go in there again, because then it's going to bring all of them back to me, like it did last year and I had to go in and resubmit and resubmit and resubmit, all three of them, because it brought them back.

But, they're showing on the line there as deadline due, not applicable. And then, I can't even see my financial report. Maybe it hasn't been populated yet. But, I don't even see my financial report for the next one, which I believe, will be in March 30 of next year.

(Helen): So, it sounds like perhaps that you initiated some revision, so you had to complete them again. (Melissa) or (Jennifer) could it be that he's pending tasks list is showing everything completed and that is requires work? Or, should we get his name and number and call him?

(Melissa): I'd rather take a look (unintelligible). It sounds unusual.

Okay, caller, can we get your name and telephone number, so we can call you back. We may need to take a look at your - the screen that you see.

Glen Conerty: Okay, sure. My name is Glen, last name is Conerty, C-o-n-e-r-t-y, and my direct line is 619-628-5569.

Christopher Suzich: Okay, thank you, Glen. Somebody will be in touch.

Coordinator: We have no further questions.

Christopher Suzich: Angela, do you want to provide the instructions one more time, in case anybody has a question.

Coordinator: Once again, to ask a question, please press star 1.

Christopher Suzich: Angela, could you also provide the phone number one more time, the call back recording number.

Coordinator: Toll free is 868-448-5647. The toll number is 203-369-1189.

Christopher Suzich: Do we have any other questions in the queue?

Coordinator: Yes, we just had a few questions come up.

Alabama Department of Children's Affairs, you're line is open.

Cynthia Michaud: Hi, this is Cynthia Michaud and LaTrena Dixon with the State of Alabama Department of Children's Affairs. We have several grants. One is a Head Start grant. And, also a couple of home visiting grants. Our home visiting grants are already under Electronic Handbook. But, our Head Start grant that we've had for several years is not. Do we need to register that one? The award number is 04CD0034/03.

Christopher Suzich: Cynthia, the Head Start Program, does not use the EHB system, so there's no way that you would be able to manage that grant with in EHB, unfortunately.

Cynthia Michaud: Okay, no problem. We're just making sure that we didn't have to register with it, because we haven't been, and we hadn't heard anything. But, we wanted to make sure that we were compliant. So, just the home visiting grant is the only things that are required in the EHB.

Christopher Suzich: That's right. Did you have another question?

Cynthia Michaud: No, I think we're good. Thank you. I appreciate it.

Coordinator: Wisconsin Primary Healthcare Association, your line is open.

Khadija: Yes, hi, my name is Khadija and I'm having the same issue with the previous caller, in regards the NA deadline due date. I have two grants that are showing NA and I know one of them is due March 2014. But again, it's showing as not applicable.

Christopher Suzich: (Melissa), is this related to the larger FFR issue that we were talking about or no?

Khadija: One of them, yes. The financial report, but it's showing no deadline for that one and I know it's due (unintelligible) March 2014.

Christopher Suzich: One second, caller. Go ahead (Melissa).

(Melissa): It's might be, it's hard to tell without.

Christopher Suzich: Okay, do you want to give us those numbers caller?

Khadija: Sure, the grant number is U58, C as in Charlie, S as in Sam, 06821.

Christopher Suzich: U58CS06821?

Khadija: Correct.

Christopher Suzich: And did you say you had another one?

Khadija: Well, the other one is just missing. I'll just give you the grant number and the grant ends this month, the end of this month and I don't see any FFR due. So, that one is H2QTS25670.

(Melissa): Is there a number where we can contact you.

Woman: Sure, my number is 608-443-2948.

(Melissa): 2948.

Woman: 2948.

(Melissa): We'll go ahead and research this a little more and we'll contact you.

Christopher Suzich: I'm sorry. Did you give your name caller?

Khadija: My name is Khadija, K-h-a-d-i-j-a.

Christopher Suzich: Okay, we're going to look into that and give you a call back, Khadija.

Khadija: Okay, thank you.

Coordinator: Stone Soup Group, your line is open.

Amy Westfall: Hi, thank you. My name is Amie and I have a few questions. So, in EHB under the users tab, it notes two staff in there. But then, when I go under - and it notes me as just an employee, and then underfunded grants, under the entities tab, it notes me as the Project Director. On my Notice of Award, it says something different again. And, it notes three people.

It does note me as the Program Director, but again, that's not in EHB, under the one tab and it won't let me upload things and stuff like that, like it's supposed to. And, we in July on our Notice of Award, it says that we made changes to add me as the Program Director, which is done, but we also at the same time, added another person and took two people off. And, that wasn't done. So, I guess I'm just wondering what the next step is to make sure the right people are on, the right people are off, in this, as well as PMS.

Christopher Suzich: Can we get your grant number?

Amy Westfall: Yes. Sorry I left that page. Let me bring that up real quick. Okay, it is H84MC12893.

Christopher Suzich: And you're the Project Director, caller?

Amy Westfall: Yes.

Christopher Suzich: So, you need to clean up your users and the roles on your account in summary, is that it?

Amy Westfall: Yes.

Christopher Suzich: One second please.

(Melissa) were you able to pull that one up?

(Melissa): Yes, it's coming up right now.

Amy Westfall: And, I had another question too, whenever we're done with this one.

Christopher Suzich: What's your last name, Amy?

Amy Westfall: Westfall.

Christopher Suzich: So, have you been able to do what you need to do in EHBs, or you would like to have financial privileges too, is that it?

Amy Westfall: I would just like to have the opportunity to upload documents.

(Melissa): You should be able to upload documents. Looking at your privileges, you seem to have all of them. Even it looks like the financial report privileges. So, you shouldn't have any issues, working on any reports or submissions.

Christopher Suzich: Have you tried to upload something and had problems, Amy?

Amy Westfall: I did a bit ago, but I was just confirming, because the role stated just employee that I'd be able to do it again.

Christopher Suzich: Okay, it looks like you're good in terms of the roles.

Amy Westfall: Okay and then how do I add and take other people off?

(Melissa): Of the grant?

Amy Westfall: No, in their roles.

(Melissa): To work on the actual grant or work in the organizational pool?

Christopher Suzich: You mean employees that have left the organization or...

Amy Westfall: Right.

(Melissa): You don't have the ability to do that, because you have the employee organizational role. You would have to go to the organization (unintelligible) link and update your role to Authorizing Official. From there, can I take your number?

Amy Westfall: Yes, 907-561-3701.

(Melissa): Okay, so what I'll do is I'll keep an eye on it. I'm going to contact you once I see you have the AO, to give you some further steps.

Amy Westfall: Awesome, thanks. And then, we got a request back to change our FFR and update it, because some numbers in there were wrong, from the past reporting period. So, I know that once I start this one that was just due, I won't be able to change the old one, which I was supposed to, right? Is that right?

Am I asking that right?

Christopher Suzich: You're asking it right. One second.

So, the question is, so you still have a previous FFR that's pending your corrections, but your next FFR is due. So, I think you want to go back in - are you able to - do you have the necessary information to complete your previous FFR?

Amy Westfall: I think so. I'm getting a little bit of direction on that from my Project Officer, but I'm wondering if I could have some more assistance with that one-on-one, maybe.

(Melissa): Questions for your financial report should be directed to your Grant Specialist, not the Project Officer. I do see that the report that was submitted in September was not accepted. Are you not clear on what needs to be revised?

Amy Westfall: Yes, we have had staff changeover and this is the first time that I've done that. And, we don't have a financial person right now. So, I guess I'm trying to read it and figure out which numbers go where. It's really kind of that.

(Melissa): Okay, your Grants Management Specialist should be able to help you through that.

Christopher Suzich: But, we'll give you a call back regarding the roles. (Melissa) will keep an eye on that part. But, that shouldn't stop you from reaching out to your Grant's Management Specialist, Amy.

Amy Westfall: Okay, thank you.

Coordinator: Your next question comes from HRSA.

Woman: Please press star 6 to unmute your phone.

Christopher Suzich: Let's go to the next one Angela.

Coordinator: Okay, the last question is Child Development, Division of RWBT.

Woman: Hi, this is (Cynthia) and I have two things if I may. Like two previous callers, I also have on my task list, information that there are tasks that have no deadlines and they are in fact old documents that were submitted. And, I just left them there. They're not necessarily bothering me, but if they shouldn't be there, they do happen to be there. So, that was the first thing. And I can give you my grant number if you want to clear it up, and if not, that's fine too.

And then the second thing is, I work with the State Child Development Division and we have a business office. And, the particular grant that I work with is the Early Childhood Comprehensive Systems Grant and the way that that rolled out this year, was the timing of the grant and therefore the fiscal reporting in particular, the project reporting too, but the fiscal reporting changed.

And, falls smack in the middle of any particular quarter. And, it's really challenging. So, the business office did ask me to ask someone, and I don't know if you are the right folks, is there any way to talk to someone about realigning when those reports are due, so that they fall somewhere at the end of the quarter, not in the middle. It's really hard for our business office to get all of the information through its processes or the state processors to actually comply with the deadlines for the FFR.

And so, we're just having trouble meeting the deadlines, because of the processes we have to go through here in the state, since the FFR is due kind of mid-quarter.

Christopher Suzich: It's due mid-quarter, I'm sorry I wasn't following.

Woman: Sure, the way that the grant started on August 1 for instance. So, when those reports are due, say they're due annually, they're due then, September, whatever the date is, I can't remember precisely.

Christopher Suzich: September 30, of the following year, right?

Woman: Exactly. So, they're due right at the end of a normal financial quarter, and it's really, really challenging. We just had the first one due and it's incredibly challenging for our business office to comply with that date, because of the processes, the actual accounting processes, and the way that they work.

So, for instance, our next - our financial report - oh, I only have right now, unfortunately I'm only showing the performance reports that are due, not the fiscal report.

Well, for instance, one will be due on 10/29/2016, at the end of our grant. And again, it falls right smack in the middle of a typical you know financial quarter. So, they were just wondering if there's any way to align the reports with when quarters actually end.

Christopher Suzich: Well, it never hurts to ask. But, I'm sympathetic to your plight, but unfortunately, the due dates that we have for the financial reports are based on, as you pointed out, the budget-period start date for the particular grant. And, we are under departmental direction to align those on a quarterly basis.

Woman: I figured that would be the answer. But, I told them I would ask.

Christopher Suzich: I'll ask Kelly if she wants to add anything. But, I don't think there's anything we can do.

Kelly Long: I mean, the best we can do is take that forward. As Chris said, we are under department direction to align our FFR due dates, with those of the Payment Management System, the dates. And, that came because of several requests from the field. You know, to make it easier for folks.

Woman: Okay, if the business office continues to run into a challenge, would it be appropriate or okay to ask for an extension each time by a few weeks even? Or, is that going to get us in hot water.

Kelly Long: No, that would be appropriate to do so. Better to ask for an extension then to be late.

Woman: Okay, thank you.

Coordinator: We have no further questions.

Christopher Suzich: Do you want to give the directions one more time, Angela?

Coordinator: Once again, to ask a question, please press star 1.

Christopher Suzich: Anything in the queue, operator?

Coordinator: Yes, we have one more from Northern Navajo Medical Center.

Linda Knedler: Can you just go over the steps for requesting an extension?

Christopher Suzich: Sure. The steps for requesting a financial report extension, is that it?

Linda Knedler: Yes.

(Melissa): (unintelligible) the report is already in - you would get to the task tab, and submissions link on the left side menu. And, the request extension link is usually there. But, if you're not already late, I think you might need to click on that triangle, the little arrow next to the link to start or edit the report. And, you should see a request extension link.

Linda Knedler: Okay, thank you.

Christopher Suzich: So, the process is a little different if you're already late, compared to if you're not yet late, caller.

Linda Knedler: Okay, thank you.

Christopher Suzich: That's what we were trying to say, right (Melissa)?

(Melissa): Right and is this Linda?

Linda Knedler: Yes.

(Melissa): Yes, I'm going to be contacting you about, your role, and certainly shoot me an email and ask me any questions there as well.

Linda Knedler: Okay, thank you.

Christopher Suzich: Any other questions, Angela.

Coordinator: No further questions.

Christopher Suzich: Okay, I'd like to thank everybody for joining the call today. And, I'd like to certainly thank all my colleagues for answering all those questions.

If we took your personal information, and said we would give you a call back, please expect a call back sometime next week. Thank you again.

Angela, can you put us in post-conference?

Coordinator: This concludes today's conference. You may disconnect at this time.

END