OFAM Recipient Technical Assistance Call I

Office of Federal Assistance Management (OFAM)
Health Resources and Services Administration (HRSA)

Vision: Healthy Communities, Healthy People
Welcome

• Listen-only Mode
• HRSA Topics
• Questions and Answers
Agenda

• Reminders

• Federal Financial Report (FFR)

• Unique Entity Identifier (UEI)

• Q&A
Presentation Location
Contact and Technical Assistance Information

• HRSA Contact Center number: (877) 464-4772

• EHBs Help and Ticketing System: http://www.hrsa.gov/about/contact/ehbhelp.aspx

• Payment Management Services (PMS): 877-614-5533 or https://pms.psc.gov/

• Bureau of Primary Health Care: 1-877-974-2742. or http://www.hrsa.gov/about/contact/bphc.aspx
Electronic Handbook Help and Knowledge Base


• HRSA Grants TA webpage: http://www.hrsa.gov/grants/apply/
Updating and Managing EHBs Contact Information

• Managing Profile Information:
  ▪ https://help.hrsa.gov/display/public/EHBSKBFG/User+Profile+Management+FAQs

• Interactive Videos:
  ▪ https://help.hrsa.gov/display/public/EHBSKBFG/Interactive+Videos
SAM.gov and Grants.gov

• Update your [SAM.gov](http://www.sam.gov) and [Grants.gov](http://www.grants.gov) registrations.
• [SAM.gov](http://www.sam.gov) and [Grants.gov](http://www.grants.gov) are free
• Expired registrations will not receive HRSA funding
Federal Financial Report (FFR)
Financial Reporting Migration to PMS Highlights

• Financial reporting for HHS grant recipients consolidated through the Payment Management System (PMS)
  ▪ Effective October 2020

• The EHBs no longer accepts FFRs

• Recipients are notified when FFRs are available in PMS
Updating Permissions or Requesting Access

New user access request
https://pms.psc.gov/grant-recipients/access-newuser.html

Update permissions access request
https://pms.psc.gov/grant-recipients/access-changes.html

It can take up to 3 days to process a User Access Request
Recipients will be able to search for FFRs based on different criteria (e.g., Payee Account; Document Number)

From the FFR search results under “Actions”, select “Review” to display the FFR

Note that the Federal Grant ID is the Document Number
### Prepopulated FFR Fields: Editable vs Non-Editable

<table>
<thead>
<tr>
<th>Federal Financial Report Line</th>
<th>Annual</th>
<th>Final</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Agency Name (1)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Federal Grant/Subaccount (2)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Recipient Organization Name/Address (3)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>DUNS Number (4a) and EIN (4b)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Recipient Account Number (5)</td>
<td>Editable</td>
<td>Editable</td>
</tr>
<tr>
<td>Report Type (6)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Project/Grant Type (8)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Reporting Period End Date (9)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Cash Receipts (10a)</td>
<td>Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Cash Disbursements (10b)</td>
<td>Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Authorizations (10d)</td>
<td>Non-Editable</td>
<td>Non-Editable</td>
</tr>
<tr>
<td>Total Recipient Share Required (10i)</td>
<td>Editable</td>
<td>Editable</td>
</tr>
</tbody>
</table>
Discontinuation of Federal Cash Transaction Report

Effective April 2022, Recipients will no longer complete lines 10a through 10c of the SF-425 Federal Financial Report (FFR) within PMS.

- New functionality will prepopulate information thus reducing recipient burden and redundancy of reported information
- 10a (cash receipts) and 10b (cash disbursements) will be populated based on funds drawn

FFR reporting requirements and due dates will not be impacted by this change.
Requesting a Carryover

Intent to carryover funds (including Expanded Authority) should be stated in the FFR Remarks

Prior Approval requests to carryover unobligated balances will still be submitted to HRSA through the EHBs

Prior approval requests should be submitted within 30 days of submitting the FFR
Final FFR Special Considerations

Cash Receipts (10a) = Cash Disbursements (10b) = Expenditures (10e) on Final FFRs
  - If do not reconcile will not be able to submit

No unliquidated obligations (10f) on Final FFRs
  - Request an extension of the FFR due date to liquidate funds
Requesting a Due Date Extension

Internal HRSA process requiring GMS approval

Recipient must provide

- Grant Document Number
- New due date
Revising Federal Financial Reports (FFRs)

FFR cannot be edited during agency review

Revising approved FFRs (detailed explanation required)
  - Update cumulative expenditures on current FFR available
  - Remarks must specify the: Value being changed; Budget Period being changed; and Reason for the change

Recipients have 15 months after PPED to submit revision
Recipient Resource: Who to Contact

**PMS:**

Help Desk Self Service Portal

- FFR Access issues
- FFR Submission issues
- Locating the FFR in PMS
- Calculated Field Issues
- 10a/10b (prepopulated)

**GMS:**

Listed on the Notice of Award

- Header Information Issues (e.g. org. name, EIN, report type, etc.)
- Lines 10d – 10o Issues (e.g. Authorizations)
- FFR Data Entry Questions (e.g. recipient share, indirect expenses, expenditures, etc.)
UEI Transition and SF-424 Budget Form Changes

Vision: Healthy Communities, Healthy People
UEI Transition from DUNS

Information about the UEI Transition and Changes in the EHBs
Unique Entity Identifier (UEI) Transition

• EHBs updates to support the new Unique Entity Identifier (UEI)
• UEI is replacing the Data Universal Numbering System (DUNS) for new and existing organizations
• UEIs from SAM.gov are imported automatically into the EHBs for all organizations registered in SAM.gov
• As of March 24th 2022, the EHBs transitioned to using the UEI
• April 4th 2022, the federal government will use the UEI only
• For details, refer to the GSA Web site: https://gsa.gov/entityid
UEI Transition EHBs Timeline

• EHBs changes rolled out incrementally through 2021:
  ▪ Examples: Organization Registration, Grantee My Portfolio pages, Application Tracker, EHBs and Grants.gov Applications, Smart Assist, Notice of Award (NoA)

• Throughout 2022: Remaining pages that mention DUNS will be updated

• Historical records will continue to show DUNS

• Keep an eye out for EHBs notifications as timelines are subject to change.
What do I need to do now?

• As soon as possible check your organization information in the EHBs to ensure a UEI is listed

• If a UEI is not listed in the EHBs:
  ▪ Ensure your organization registration is active in SAM.gov
  ▪ If not already registered, register in SAM.gov and provide your UEI to your grant and program office contacts

SAM.gov will be down from April 1 (8pm EST) – April 4 (9am EST)
What’s Happening After March 24th?

• All organizations will be required to have a UEI to apply for HRSA funding opportunities
• Organizations must enter their UEI on applications and in the EHBs, including registration, data entry, and search features
• Subsequent updates will come through 2022 and UEI will replace DUNS throughout the EHBs
UEI Transition EHBs Screenshots - Applications
UEI Transition EHBs Screenshots - NoA
UEI Transition References

• For more information on the UEI changes in the EHBs check out the EHBs Help wiki pages:
  ▪ https://help.hrsa.gov/x/44McCQ

• Refer to the GSA website for information on the transition:
  ▪ https://gsa.gov/entityid

• To register or check on your registration in SAM.gov, visit:
  ▪ https://sam.gov
SF-424 Structured Budget Form

Changes to the Prior Approval Request and Other Electronic Document Management (EDM) Submissions Budget Information
SF-424 Structured Budget Forms

• Effective January 28, 2022 you will no longer use attachments to submit budget information for:
  ▪ Prior Approval Requests (PAR)
  ▪ Other Electronic Document Management (EDM) Submissions

• Moving forward you will use Structured Budget Forms in the EHBs to submit budget information

• No changes to the approval process

• Structured budget data collection provides data integrity, avoids manual data entry errors, and makes the process more efficient
Structured Budget Form Screenshots – Prior Approval Requests

![Prior Approval Request - Status Overview]

**Success:**
You have successfully created a Prior Approval Request. The Request Tracking Number is PA-00100078. Please use this number for all future correspondence related to this request.

- **PA-00100078**: BEALL'S POULENC HEALTH CENTER, BANCROFT, NV
  - Submission Status: In Progress
  - Prior Approval Request Type: Capital Update
  - Grant Number: H00CS00569
  - Project Period: 02/01/2019 - 01/31/2023

**Resources**
- View
  - Last NoA | HRSA Contacts | Awarded Funding Opportunities

**Users with permission on Prior Approval Request (8)**

<table>
<thead>
<tr>
<th>Section</th>
<th>Status</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information</td>
<td>Not Started</td>
<td>Update</td>
</tr>
<tr>
<td>Details</td>
<td>Not Started</td>
<td>Update</td>
</tr>
<tr>
<td>SF424 A - Section A-C</td>
<td>Not Started</td>
<td>Update</td>
</tr>
<tr>
<td>SF424 A - Section D-F</td>
<td>Not Started</td>
<td>Update</td>
</tr>
<tr>
<td>SF424 A - Budget Narrative</td>
<td>Not Started</td>
<td>Update</td>
</tr>
<tr>
<td>SF424 C - Budget Narrative</td>
<td>Complete</td>
<td>Update</td>
</tr>
<tr>
<td>SF424 C - Budget Information</td>
<td>Complete</td>
<td>Update</td>
</tr>
</tbody>
</table>
Structured Budget Form Screenshots – Other EDM Submissions

![Structured Budget Form](image.png)

**Budget Information - Section A**

<table>
<thead>
<tr>
<th>Grant Number: UKMCO0007</th>
<th>Reporting Period: 09/30/2021 - 09/29/2022</th>
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</thead>
<tbody>
<tr>
<td>Submission Name: EDM SF 424 R&amp;R Submission Name</td>
<td>Submission Type: Other Submissions</td>
</tr>
<tr>
<td>Submitted By: N/A</td>
<td>Available Date: 12/14/2021</td>
</tr>
</tbody>
</table>

**Due Date:** 9/30/2023 | **Submission Status:** In Progress

**Fields with * are required**

### Budget Period: 4

<table>
<thead>
<tr>
<th>Field</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>1/14/2022</td>
<td>(mm/dd/yyyy)</td>
</tr>
<tr>
<td>End Date</td>
<td>1/14/2022</td>
<td>(mm/dd/yyyy)</td>
</tr>
</tbody>
</table>

**Project Director (PO) specified in SF 424 RR must be added as a Senior/Key Person for Budget Period 4.**

**Senior / Key Person**

<table>
<thead>
<tr>
<th>Name</th>
<th>Requested Salary</th>
<th>Fringe Benefits</th>
<th>Funds Requested</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieng Feth</td>
<td>$10.00</td>
<td>$10.00</td>
<td>$20.00</td>
<td>Update</td>
</tr>
</tbody>
</table>

Total of Funds Requested: $20.00

### Budget Period: 6

<table>
<thead>
<tr>
<th>Field</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>1/14/2022</td>
</tr>
</tbody>
</table>

**Provide end date that is after the start date.**
Structured Budget Form Resources

• For more information on the changes to Prior Approval Requests check out the EHBs Help wiki pages:
  ▪ Creating Prior Approval Requests: https://help.hrsa.gov/x/oHFC
  ▪ Prior Approval Requests FAQs: https://help.hrsa.gov/x/aIBaAQ

• For more information on the changes to Other EDM Submissions check out the EHBs Help wiki pages:
  ▪ Editing and Submitting Other Submissions (EDM): https://help.hrsa.gov/x/B4LFC
  ▪ Other Submissions (EDM) FAQs: https://help.hrsa.gov/x/B4LFC

• For additional questions, reach out to your Grants Management Specialist (GMS) or Project Officer (PO)
Questions and Answers

• Please have your grant number ready

• If we cannot answer your question, we will take your contact information and get back to you
Survey
UEI Contact Information

Boris de Souza, PMP
Office of Federal Assistance Management
bdesouza@hrsa.gov
Topic Ideas

• Do you have a topic you would like to see presented during an upcoming TA call?

• Email your ideas to HRSAPostAwards@hrsa.gov
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