Top Reasons HRSA Grant Recipients
Contact the EHBs Customer Support Center,
plus an Electronic Handbooks (EHBs)
System Overview

HRSA EHBs Training Team
Office of Information Technology (OIT)
Agenda

- System Overview
- Contacting the EHBs Customer Support Center
- EHBs Home Page
- Top Reasons for calling the EHBs Customer Support Center
- Additional System Resources
- Questions
Electronic Handbooks
Grantee System Overview

What are the Electronic Handbooks?
What are the Electronic Handbooks?

- The HRSA Electronic Handbooks (EHBs) is the grants and program management system used by HRSA and its grant recipients.


- Allow authorized individuals within an organization to view, edit, or submit grant-related information electronically.

- Facilitate HRSA monitoring and oversight of programs.
grants.hrsa.gov

https://grants.hrsa.gov (use the “Applicant/Grantee” option).
EHBs System Overview: Login Page

- EHBs System Browser Requirements for Testing your settings
- System Message Banners
Contacting the EHBs Customer Support Center

The EHBs Customer Support Center
When contacting the EHBs Customer Support Center for assistance it’s helpful to have:

- Grant number available.
- Task tracking number if applicable.
- Application number if applicable.
Contacting the EHBs Customer Support Center: Reporting System Errors

Reporting a System Error issue? Include:

• A few of the steps you took prior to the error.
• Screen shots or detailed description of the issue.

Note: This assists with timely resolution of the problem.

• Using the error reporting feature? Only submit the issue once.
Contacting the EHBs Customer Support Center: User Privileges

- The EHBs Customer Support Center does not grant privileges for grantees users.
- Organizations must manage access and privileges for their staff.

Note: Please refer to the video and Wiki link for Managing EHBs Users.
Contacting the EHBs Customer Support Center (cont.)

Refer to the video and wiki link for Managing Users in the EHBs: https://help.hrsa.gov/x/B4AQB
Resolution Sequence of EHBs Customer Support Center

- **Tier 1**: EHBs Customer Support Center
- **Tier 2**: If EHBs issues need further resolution
- **Tier 3**: IT Developers

Grant Recipient first contact for EHBs system assistance
EHBs Home Page

Home Page, Help, and Search Assistance
EHBs Home Page Overview

- Organization of the Home Page
- Search Bar Assistance
- Support - EHBs Help
About the EHBs Home Page

➢ The EHBs Home Page is organized to help users complete daily tasks with ease.
➢ The EHBs has user-friendly videos and links to frequently asked questions (FAQs).
EHBs Home Page Layout

Reminder: Recipients expending $750,000 or more in federal awards during their fiscal years must have audits completed in accordance with 45 CFR Part 75, Subpart F and submit the related audit reports to the Federal Audit Clearinghouse within the earlier of 30 days after receipt from the auditors or nine months after the end of the audit periods.
The EHBs home page has a “Search Bar” which allows users to search for items based on key words.
When users type key words into the Search Bar, a dropdown menu is displayed, returning results related to the search.
Support – “EHBs Help”

- Hover View from the EHBs Home Page.
- Hover over the “Question Mark” in the top right corner, and click on the “EHBs Help” link. Users can then access “EHBs Help” link through the “Support” section on the Home page.
Clicking on the “EHBs Help” link will bring users to the EHBs Help and Knowledge Base page. Links to additional resources are available and organized for easy navigation.
Help Topics

- Topics are listed for easy navigation.
- “Help Topics” will include links to everyday questions.
- “Interactive Videos” are available and provide a visualization for each topic.
Top Reasons for Calling the EHBs Customer Support Center

How Do I Resolve EHBs System Issues?
Top Reasons for Calling the EHBs Customer Support Center

1. Navigation
2. Password Reset
3. Terminate Session
4. Unlock Account
5. Create Account/Register
6. Project Director Change
7. Adding a Grant to Your portfolio
8. User Privileges
9. Updating Profile
10. User Help
The Tabs at the top of the page are organized for easy access to applicable tabs. The “My Tasks”, “Help” (with videos) and “Smart Assist” sections are also available.
The “Tasks” tab allows users to work on specific actions as long as the appropriate privileges have been assigned.
Clicking on the “Tasks” tab will take the user to their “Pending Tasks – List” page, where direct action can be taken on submissions.
“Organizations” TAB

- Hover view from the EHBs Home Page.
- The “Organizations” tab allows users to Register to Another Organization.
- Users can update their EHBs profile information, verify their email, change their password, and change their Organization Role.
Your “Organizations” Tab

Clicking on the “Organizations” tab will take the user to the “My Registered Organizations – List” page. All registered organizations are displayed.
“Grants” Tab

- Hover view from the EHBs Home Page.
- The “Grants” tab allows users to work on Grant Submissions, Prior Approvals, Add a new Grant to their portfolio, and view users related to their Grants.
Your “Grants” Tab

- The Grants Tab will display all grants for which you have access.
  - When you first log in to the EHBs, you will not have access to organization information until your account is validated by adding the grant to your portfolio.
  - Click “Add Grant to Portfolio” if you do not see the grant you are looking for in the list of Grants.
Your “Grants” Tab (cont.)

- Clicking on the “Grants” tab will take users to the “My Grant Portfolio – List” page, where individual grants can be accessed.
- To view individual grant information, click on the respective “Grant Folder” link.
Grantees can access Project Officer (PO) and Grants Management Specialist (GMS) contact information, view the Last Notice of Award (NoA), and work on Grant related items.

To view the PO and GMS contact information, or the Last NoA, click on the appropriate link.
“Resources” Tab

- Hover view from the EHBs Home Page.
- The “Resources” tab allows users to get help with several key resources.
“Resources” Tab (cont.)

- From the EHBs Home Page clicking on the “Resources” tab will display the quick links for accessing help within the EHBs.
If you need to reset your password:

- Click “Forgot Password” on the Home Page.
On the “Forgot Password – Reset” page click “Continue” and follow steps and instructions to reset password.
Terminate Session and Unlock Account

If you need to terminate your EHBs session or unlock your account, please contact the EHBs Customer Support Center:

- **Phone:** 877-464-4772
- **Hours:** 7:00 AM – 8:00 PM EST (M-F)
- [https://www.hrsa.gov/about/contact/ehbhelp.aspx](https://www.hrsa.gov/about/contact/ehbhelp.aspx)
Create an EHBs Account/Register User

How Do I Create an Account or Register a User?
Create Account

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

- If you have registered before, you do not have to register again.
  - Click “Create an Account” if you are not sure.
Create Account (cont.)

- Options are available to guide you through the registration process or locating your username.
- Use the first option, “I am Not Sure! Check if I have an account.”
Create Account (cont.)

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

Use one of the additional options if you know that you have an account and one of the specific scenarios applies to you:

- **I have never had an account.**
  - I am Not Sure! **Check if I have an account**
  - I have never had an account: **Create an Account**

- **I have an account and...**
  - I created an account but it is registered with another organization: **Associate the same account with a new organization**
  - I created an account but did not complete my registration: **Complete Registration**

- **I have an account, but...**
  - I forgot my username: **Reach HRSA Contact Center to get your username**
  - I forgot my password: **Reset Password**
  - My account is disabled: **Reach HRSA Contact Center to reactivate your account**
If you forget your username, password, or your account is disabled, please use the following options listed under the “I have an account, but…” section:

- I have never had an account: Check if I have an account
- I have never had an account: Create an Account

- I have an account and...
  - I created an account but it is registered with another organization: Associate the same account with a new organization
  - I created an account but did not complete my registration: Complete Registration

- I have an account, but...
  - I forgot my username: Reach HRSA Contact Center to get your username
  - I forgot my password: Reset Password
  - My account is disabled: Reach HRSA Contact Center to reactivate your account
Create an Account: User Information

Complete registration form with your information

Fields with * are required

User Information

- First Name
- Middle Initial
- Last Name
- Username
- Password
- Re-type Password
- Security Question
- Security Answer

Contact Information

- Email Address

Check Availability

Minimum number of characters is 8

Choose Option
Create Account: Associate Account to Organization

- Search using your Grant Number to ensure that you add your account to the correct organization.
Create Account: Organizations - List

- Searching using your Organization Name may result in multiple results.
  - Click side arrow to view more information.
Create Account: Organizations – List
(Detailed View)

➢ Click “Register” to add the organization to your account:
Create Account: Choose your Organization Role

- The organization role can be changed later, if necessary. This is your role at the Organization. Most users are “Other Employee.”
Project Director Change

Need to Change Your Project Director?
Project Director Change

➤ Take a look at this Video:

https://help.hrsa.gov/display/public/EHBsSKBFG/Video+How+do+I+change+my+Project+Director
Adding a Grant to Your Portfolio and Providing EHBs Privileges

Do You Need to Provide Privileges to Others in Your Organization?
Adding a Grant to Your Portfolio

When you “Add Grant to Portfolio” you will need to select your role for the grant. Only the Project Director should select the PD role.
Grant Level Privileges

- **Register the Project Director**
  - There is only one Project Director allowed for each grant.
  - Name must match name listed on the most recent Notice of Award (NoA).
  - Will have access to all non-financial reports once validated.
  - Manage access and privileges for other users.

- **Request Access (all others)**
  - Any other members of the organization who will need to view, edit or submit information to HRSA should choose this option.
Requesting Grant Privileges

- To request Privilege/Access for a grant, right-click on the Grant Folder, then click “Request Privilege.”
Verify Your Privileges

- Right click on “Privileges” to determine what privileges you have for the grant.
Grant Access Request

- If the user needs to submit Performance Reports, this is where that level of access will be granted.
- The Project Director will automatically have access to the Performance Report once the grant has been added to the portfolio.
- All others will need to be given privileges by the Project Director or other user with “Administer Grant Users” privileges for the Grant.
The Project Director should approve “Administer Grant User” privilege for at least one delegate to approve privileges for other users.

Anyone with “Administer Grant User” privileges for a grant can approve and manage user privileges.
Updating Your Profile

When Should I Update My Profile?
Updating Your Profile

➢ If any of your contact information changes, you must update your profile.
  ▪ From within your account, click the View/Update Profile link:
Updating Your Profile (cont.)

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

Do You Know About HRSAtube and Additional Resources Available?
HRSAtube (cont.)

- HRSAtube Playlists:

  Electronic Handbooks (EHB)
  HRSAtube - 3 / 31
  
  - EHBs Home Page and Navigation
  - Managing Users in the EHBs
  - EHBs User Permissions Overview
  - Getting Started EHBs
  - How to Create an EHBs Account
  - How to Register to an Organization
  - How to Reset a Password
  
  data.HRSA.gov website launch
  HRSAtube
  674 views

  Uniform Data System (UDS)
  2018 Enhancements
Additional EHBs Help

For EHBs help, please contact the EHBs Customer Support Center:

- Phone: 877-464-4772
- Hours: 7:00 AM – 8:00 PM EST (M-F)
- [http://www.hrsa.gov/about/contact/EHBshelp.aspx](http://www.hrsa.gov/about/contact/EHBshelp.aspx)
Additional EHBs Help (cont.)

Resources:

- EHBs Help and Knowledge Base
  https://help.hrsa.gov/display/public/EHBSKBFG/Index

- HRSATube - EHBs Videos
  https://www.youtube.com/user/HRSAtube

- HRSA Contact Center
  877-464-4772
  https://www.hrsa.gov/about/contact/ehbhelp.aspx

Hours:
7:00 AM - 8:00 AM EST (M-F)
How to Reset a Password?
• https://youtu.be/-iCbn3bqIws

Getting Started EHBs
• https://youtu.be/pBRhSkATjhQ

How to Create an EHBs Account
• https://youtu.be/IKs_g37cIWs

How to Register to an Organization
• https://youtu.be/KteZBjkLTc4

How to Add a Grant to Your Portfolio
• https://youtu.be/KmqVPD6vurY

How to request a Prior Approval for a Carryover of Unobligated Balances
• https://youtu.be/oVoXE2F4iIY

How to Access Performance Reports
• https://youtu.be/INM_pl8V_XE

How to Change a Project Director
• https://youtu.be/JbVw4VvDHPs

How to Request a Submission Deadline Extension
• https://youtu.be/ftV0p60qjx8

Action Plan – Grantee
• https://youtu.be/HFlOsf7V8kk

Archive Tasks Feature
• https://youtu.be/xA_dCjEqJYg

Download and Print Documents Feature
• https://youtu.be/Vy75VfRAvpc
Contact Information

For questions concerning the content of this presentation, please contact:

EHBs Customer Support Contact Center: https://www.hrsa.gov/about/contact/ehbhelp.aspx
Phone: 877-Go4-HRSA/877-464-4772 and request that questions be submitted to the EHBs Training Team, Office of Information Technology

If you have a question or concern regarding a specific grant issue or program:

For budget, reporting and other grant administrative requirement questions, please contact your Grants Management Specialist.

For project goals, scope, and other programmatic requirement questions, please contact your Project Officer.

Full contact information for both individuals is listed on the last page of your most recent Notice of Award.
Questions?

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