

# Completing the EHE Triannual Recipient Report

Ending the HIV Epidemic (EHE) Triannual Report

HRSA HIV/AIDS Bureau

August 30, 2023



Hello everyone. I'm Daniel Salas from the DISQ Team. I can see that people are still joining the webcast so we're going to wait a few minutes before we get started. That gives you time to send that last email or grab more water or coffee. I'll be back in about two minutes!

Welcome to today's Webinar – "Completing the EHE Triannual Report Recipient Report". Thank you so much for joining us today!

My name is Daniel Salas. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for several different reporting requirements including the Ending the Epidemic Triannual Recipient Report.

## Today's Webinar Content

- The EHE Recipient Report (for EHE recipients): Today
- EHE Provider Report: Wednesday, September 6, 2023 ([Register here](#))



Today's presentation is going to be covering the EHE Triannual Recipient Report which is completed by just EHE recipients. On September 6<sup>th</sup>, we'll present a separate webinar on how to complete the EHE Triannual Module Provider Report. You can register using the link on this slide.

## Today's Webinar is Presented by:



**Richard Ali**  
[RyanWhiteDataSupport@wrma.com](mailto:RyanWhiteDataSupport@wrma.com)



**Daniel Salas**  
[Data.TA@caiglobal.org](mailto:Data.TA@caiglobal.org)



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Today's Webinar on the EHE Triannual Module Recipient Report is presented by Richard Ali from Ryan White Data Support. Richard will walk recipients through how to complete the EHE Triannual Module Recipient Report.

Throughout today's presentation, we will reference some resources that we think are important. To help you keep track of these and make sure you have access to them immediately, my colleague Isia is going to chat out the link to a document right now that includes the locations of all the resources mentioned in today's webinar.

At any time during the presentation, you'll be able to send us questions using the "Question" function on your settings on the bottom of the screen. You'll also be able to ask questions directly "live" at the end of the presentation. You can do so by clicking the "raise hand" button (on your settings) and my colleague Isia will conference you in.

Now before we start, I'm going to answer one of the most commonly asked questions about the slides. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar; the slides and written question and answer are usually available within two weeks.

## Disclaimer

Today's webinar is supported by the following organizations and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, the Health Resources and Services Administration (HRSA), the U.S. Department of Health and Human Services (HHS), or the U.S. government.

The DISQ Team is comprised of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling \$4,000,000.00.

DSAS (Ryan White Data Support) is comprised of WRMA, CSR and Mission Analytics and is supported by HRSA of HHS as part of a contract totaling over \$7.2 Million.

Today's webinar is supported by the organizations shown on the slide, and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by the Health Resources and Services Administration, the U.S. Department of Health and Human Services, or the U.S. Government.

Now I'd like to turn the webinar over to Richard.

## Overview

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Background

EHE Triannual Recipient Report

Submission Timeline

TA Resources

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Thanks, Daniel and thank you everyone for joining us today. Our presentation topic for today is the EHE Triannual Recipient Report. We'll start off by looking at some background information and reviewing what exactly the EHE Triannual Report is and who needs to complete it. Next, we'll review the EHE Triannual Recipient Report, the first component of the submission that's completed by EHE grant recipients. And then we'll close out our presentation with a look at the EHE submission timeline as well as the TA resources available to assist you.

**Ending the HIV Epidemic (EHE) Triannual Report**

**2023 Instruction Manual**  
Release Date: May 15, 2023

**EHE Triannual Report Manual**

AVAILABLE ON THE TARGETHIV WEBSITE [HERE](#)

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So, I want to remind everyone that the EHE Triannual Report Instruction Manual is currently available on the TargetHIV website. The manual is a great resource to keep in mind when completing your report and contains all of the instructions I'll be presenting here today. I also recommend signing up for the DISQ listserv which notifies recipients when the manual has been updated and posted. The information for the DISQ listserv will be shown at the end of the presentation.

## Poll #1



Before we move forward, lets take a quick poll to see how experienced you all are at submitting the EHE Triannual Report.

How many times have you submitted the EHE Triannual Report previously?

- a. I have never submitted before.
- b. I have submitted once or twice before.
- c. I have submitted three or more times.

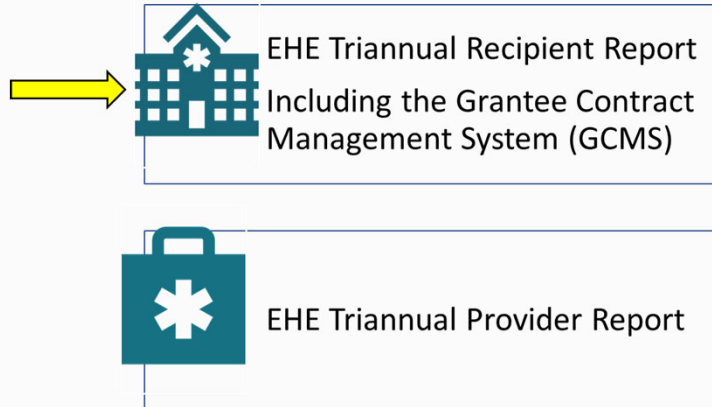
Thanks Isia. For those who have submitted before, this will be a great refresher. For everyone that is new to submitting the EHE Triannual Report this presentation will provide guidance on how to successfully submit The EHE Recipient Report.

Let's move forward.



## What is the EHE Triannual Report?

- Aggregate data report submitted three times a year by EHE recipients and EHE-funded providers
- Includes data on services received and ART prescription for new and existing clients
- Consists of two parts:

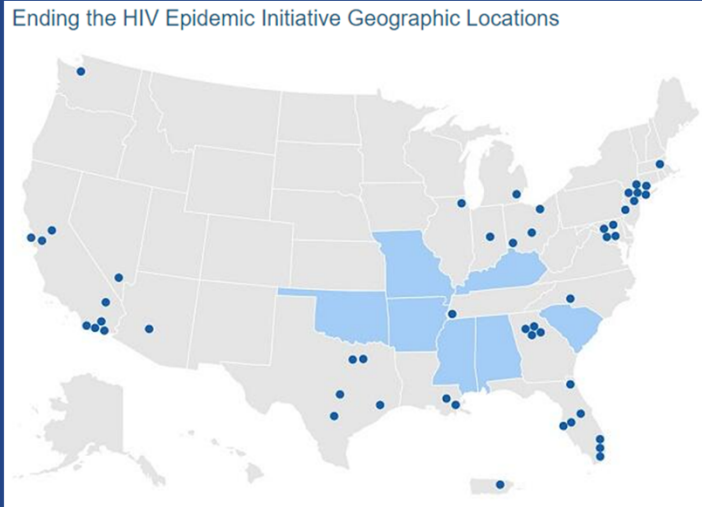


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So, what is the EHE Triannual Report? The EHE Triannual Report is an aggregate data report submitted three times a year by EHE recipients and EHE-funded providers of services. Organizations that use EHE funding to provide services will submit aggregate data on the services their clients receive and prescription of ART, specifying whether these clients are new or existing clients. The EHE Triannual submission is comprised of two parts: the EHE Recipient Report which includes the Grantee Contract Management System (or GCMS) and the EHE Provider Report. However, For today's presentation we will be discussing how to submit the EHE Triannual Recipient Report.

Who Completes  
the EHE Triannual  
Recipient Report?

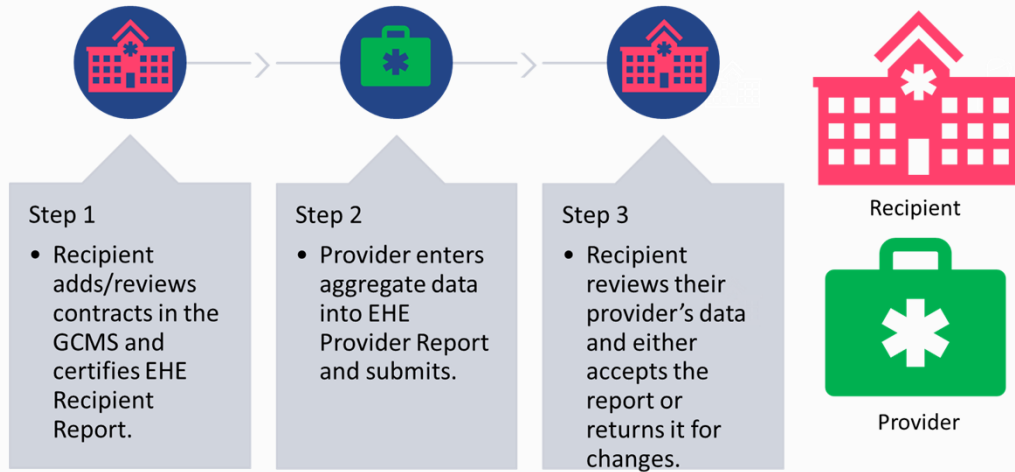
EHE Recipients  
(39 RWHAP Part A  
and 8 RWHAP Part B  
jurisdictions)



So, for those wondering who is required to complete the EHE Recipient Report, the EHE Recipient Report (which includes adding and/or reviewing contracts in the GCMS) is completed by EHE recipients. These recipients are the 39 RWHAP Part A and 8 RWHAP Part B jurisdictions that received an EHE award and will be required to complete the report.

Next, lets take a brief look at the EHE Triannual Reporting Process.

## EHE Triannual Reporting Process



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As you can see here, we have both our EHE Recipient and EHE Provider who will both be a part of the submission process. Starting with step 1 EHE recipients will add or review their EHE-funded contracts in the GCMS making sure they have a contract listed for each organization funded by their EHE award during the reporting period. Those contracts will populate their EHE Recipient Report which they will then certify. Once the recipient has certified their Recipient Report that information will then generate an EHE Provider Report for each of their EHE-funded providers to submit. This brings us to step 2 where Providers will enter their aggregate data into their EHE Provider Reports and submit their reports. For step 3 recipients will then review their EHE provider's data and either accept it or return it back to the provider for changes.

# EHE Triannual Recipient Report

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Let's move on and review how to complete the EHE Triannual Recipient Report.

## How is the EHE Triannual Recipient Report completed?

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- Completed only by EHE recipients via the [HRSA Electronic Handbooks \(EHBs\)](#)
- Recipients add/review contracts in the GCMS for their EHE funding
- EHE-funded contracts then populate the EHE Recipient Report which recipients complete and certify



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As I stated earlier, the EHE Recipient Report is completed by only EHE recipients. EHE recipients will add or review their contracts in the GCMS for their EHE funding and these contracts then populate the EHE Recipient Report which recipients are then able to complete and certify.

So, let's take a look at how EHE recipients will access and complete the report.

# HRSA EHBs

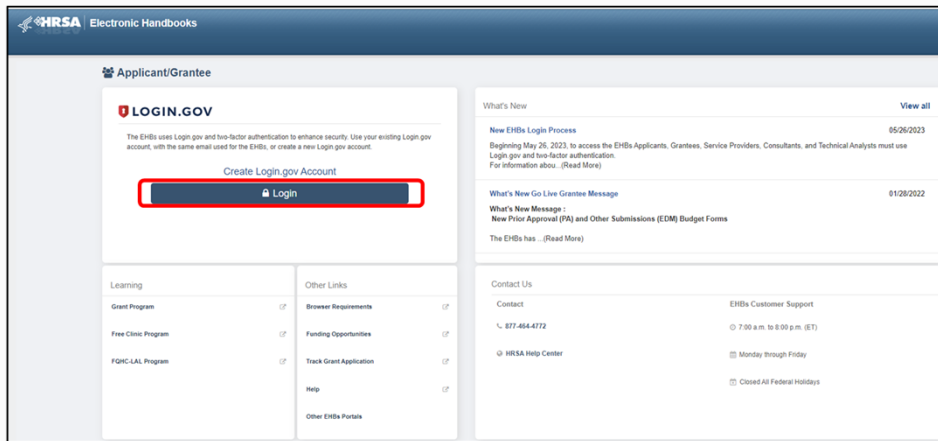
The screenshot displays the HRSA Electronic Handbooks (EHBs) portal interface. At the top left, the HRSA logo and the text "Electronic Handbooks" are visible. Below this, there are six distinct panels, each representing a different user role. Each panel contains an icon, a title, and a brief description of the role's access to the EHBs system.

- Applicant/Grantee:** Use this link if you are applying for, or have been awarded a HRSA grant and you need to access the HRSA Electronic Handbooks (EHBs). Using this link, you can also access the FTCA or FDIC system.
- Grantor:** Use this link if you are a HRSA employee and you need to access your HRSA Electronic Handbooks (EHBs).
- FI Review:** Use this link if you want to register to become a CHOME Auditor or if you already are one and need to access your work.
- Consultant/Expert:** Use this link if you are a Consultant/Expert providing technical assistance to HRSA or HRSA supported organizations and you need to access the Technical Assistance Tracking System (TATS).
- Vendor:** Use this link if you are a vendor providing technical assistance consulting services to HRSA and you need to access the Technical Assistance Tracking System (TATS).
- Technical Analyst:** Use this link if you are a Technical Analyst (TA) providing services to HRSA and you need to access the Maternal Infant Early Childhood Home Visiting (MIECHV) Annual and/or Quarterly Reports.

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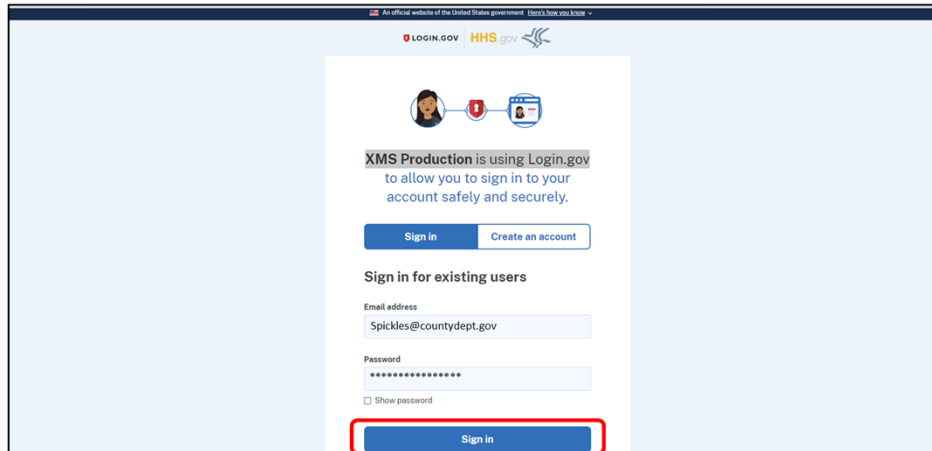
So, first we want to begin my logging into our HRSA EHBs account. EHE Recipients will access the EHBs using the applicant/grantee link shown here.

# Login.gov



On the next page you will be directed to login.gov for grantees as shown here and we will want to select login.

# Credentials for Login.gov



An official website of the United States government | 800.422.6200 | 800.422.6200

LOGIN.GOV | HHS.gov

**XMS Production is using Login.gov**  
to allow you to sign in to your account safely and securely.

[Sign in](#) [Create an account](#)

**Sign in for existing users**

Email address  
Spickles@countydept.gov

Password  
\*\*\*\*\*

Show password

[Sign in](#)

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Here you will enter your credentials and select “Sign in” to login into your EHBs account which will take you to the EHBs home page.



# EHBs Home Page

Welcome, Dr. Stu Pickles

**My Tasks**

- 23 All
- 13 Late ▲
- 1 Due Within 30 Days

**Tracking**

Category	Submitted Tasks	Submitted	Status
Grant Application	Maternal and Child Health Services (HRSA-23-001)	08/12/2022	Award Determination
Grant Application	Pediatric Mental Care Access Program and ARP- Pediatric Mental Health Care Access Program ...	08/05/2022	Award Determination
Grant Application	Maternal, Infant, and Early Childhood Home Visiting – FY22 Formula NCC Update (HRSA-...	06/06/2022	Award Determination
Grant Application	Maternal Infant and Early Childhood Home Visiting (MIECHV) (HRSA-22-116)	10/08/2021	Application Receipt
Grant Application	Maternal and Child Health Services (HRSA-22-001)	09/01/2021	Application Receipt

**Smart Assist**

- Change Project Director (PD)
- Remove user from an organization
- Remove user permissions for a grant
- Request a submission deadline extension

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Once you have logged in, hover over the Grants tab at the top of the page.

# EHBs Performance Report

The screenshot displays the HRSA Electronic Handbooks dashboard. The top navigation bar includes the HRSA logo, the text 'Electronic Handbooks', a search bar, and a menu icon. Below this, a secondary navigation bar contains tabs for 'Tasks', 'Organization', 'Grants', 'Free Clinics', 'FQHC-LALs', 'Dashboards', and 'Resources'. The 'Grants' tab is currently selected. On the left side, a 'My Tasks' widget shows a welcome message for 'Dr. Stu Pickles' and three task categories: 'All' (23), 'Late' (13), and 'Due Within 30 Days' (1). The main content area is divided into three columns: 'Submissions', 'Requests', and 'Portfolio'. Under 'Submissions', the 'Work on Performance Report' link is highlighted with a red rectangular box. Other links in the 'Submissions' column include 'Work on Progress Report', 'Work on Noncompeting Progress Reports', and 'Work on Other Submissions'. The 'Requests' column contains links for 'Work on existing Prior Approval', 'Request New Prior Approval', 'Work on Existing Health Center H80 CIS', 'Request New Health Center H80 CIS', and 'Manage HCCN PHCs'. The 'Portfolio' column includes 'Add a Grant to My Portfolio', 'Work on a Grant in My Portfolio', and 'View My Access Requests'. A 'Users' section at the bottom of the main area contains links for 'View Authorized Users', 'Authorize New Users', and 'Approve Access Requests'.

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On the drop-down menu that appears, select “Work on Performance Report.”

# Submissions-All Page

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
<input type="text"/>	All	All	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	All	<input type="button" value="Start"/>
▶ EHE Triannual Report Year 3 Trimester 2	Performance Report	County Health Department	UT8HA00000		5/01/2023-8/31/2023	10/15/2023		Not Started	<input type="button" value="Start"/>
▶ RSR 2021 Annual Performance Report	Performance Report	County Health Department	H89HA00000	234567	1/1/2021 - 12/31/2021	03/28/2022		Submitted	<a href="#">Performance Report</a>
▶ EHE Triannual Report Year 3 Trimester 1	Performance Report	County Health Department	UT8HA00000	345678	01/01/2022-04/30/2022	06/15/2022		Submitted	<a href="#">Performance Report</a>
▶ RSR 2021 Annual Performance Report	Performance Report	County Health Department	UT8HA00000	456789	1/1/2021-12/31/2021	03/28/2022		Submitted	<a href="#">Performance Report</a>

On the next page, the Submissions-All Page, you'll see a list of submissions for your organization. Locate your EHE Triannual submission under the submission name column and then select "Start" under the far-right Options column. For clarification, if your report has already been started this option will say "edit".

# EHE Triannual Recipient Report Inbox

The screenshot shows the HRSA Electronic Handbooks interface. The main heading is "EHE Triannual Recipient Report Inbox". The page features a navigation panel on the left with a red box highlighting the "Search Contracts" link. The main content area displays a table with the following data:

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	EHE	UT8HA00000	County Health Department	5/01/2023-8/31/2023		Not Started	Create	

Below the table, there are navigation controls including "Page Size: 25" and "1 items in 1 pages". At the bottom of the page, there is a footer with contact information for HRSA Help Desk and a note about Adobe Acrobat Reader.

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After selecting start, you'll be taken to the EHE Recipient Report inbox. From here, you can access both your EHE Recipient Report and the GCMS. Since we always recommend reviewing your contracts before starting your report, let's briefly go over how to access those contracts in the GCMS. To access the GCMS, click on the "Search Contracts" link in the Navigation Panel on the left side of the screen.

# Grantee Contract Management System (GCMS)

The screenshot displays the Grantee Contract Management System (GCMS) search interface. The page title is "Grantee Contract Management System". The left sidebar contains a "NAVIGATION" menu with options: "Inbox", "EHE Triannual Recipient Report", "EHE Triannual Provider Report", "Manage Contracts", "Search Contracts", and "Search". The "Search Contracts" option is selected. The main content area features a search form with the following fields: "Grant Number" (with value "UTBHA00000"), "Org ID" (with "(comma separated list)" below), "Registration Code" (with "(comma separated list)" below), "Organization Name", "Funded Through", "Contract ID" (with "(comma separated list)" below), "Reference", "Range Start Date", "Range End Date", and "Project Officer" (with a dropdown menu showing "All Project Officers"). There are "Reset" and "Search" buttons at the bottom of the form. The top navigation bar includes "HRSA Electronic Handbooks" and "Support" links. A session expiration notice "Your session will expire in: 28:11" is visible in the top right corner.

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Selecting “Search Contracts” will take you to the GCMS Search page shown on this slide. You can use the reporting period dates in the date range boxes shown at the bottom to see which contracts are entered for the current reporting period. Make sure you have a contract listed for each organization that was funded to provide services with your EHE funding during the reporting period. Your subrecipients will not have an EHE Provider Report to complete if you don’t list them in your contracts.

## GCMS Additional Information



Recipients must have a contract for each organization providing EHE-funded services



Available on the TargetHIV website:

[Completing the GCMS webinar](#)  
[GCMS Instruction Manual](#)



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Although I won't be going into detail about the GCMS today, it is important to note that as a part of your Recipient Report submission, you'll be reviewing your contracts in the GCMS. You want to make sure that you have a contract in this system for each organization that is providing EHE-funded services, which includes all EHE-funded providers and your own recipient organization if you are providing services as well. Ensuring these contracts are entered and up to date allows the system to use this information to create the EHE Provider Reports where the EHE triannual data are entered.

The contracts for this reporting period may have already been entered during a previous EHE Triannual Report opening or for the EHE Allocations Report. You don't have to enter them again but just make sure that they are still accurate. You don't need to have a separate contract for each separate Triannual Report, just a separate contract for each year that will populate that year's reports as you move forward.

If you find yourself needing some further assistance working on your contracts in the GCMS, there are some helpful resources available on the TargetHIV website, which include the Completing the GCMS webinar and the GCMS Instruction Manual which are linked on this slide. Of course, you can also reach to Data Support with your

questions. The contact information for Data Support will be shown at the end of the presentation.

# EHE Initiative Services

- EHE-specific service category
- EHE Initiative Services include those services that are funded through EHE Initiative funding but do not meet the definition of a RWHAP service, as outlined in [PCN #16-02](#)

Health Education/Risk Reduction	<input type="checkbox"/>	
Housing	<input type="checkbox"/>	
Linguistic Services	<input type="checkbox"/>	
Medical Transportation	<input type="checkbox"/>	
Outreach Services	<input type="checkbox"/>	
Psychosocial Support Services	<input type="checkbox"/>	
Referral for Health Care and Support Services	<input type="checkbox"/>	
Rehabilitation Services	<input type="checkbox"/>	
Respite Care	<input type="checkbox"/>	
Substance Abuse Services (residential)	<input type="checkbox"/>	
MAI Education	<input type="checkbox"/>	
MAI Outreach	<input type="checkbox"/>	
Other Professional Services	<input type="checkbox"/>	
* Service Category: EHE Initiative Services	<input type="checkbox"/>	
Ending the HIV Epidemic Initiative Services	<input type="checkbox"/>	

Done updating services

\* Your changes will not be saved until you select the "Save" button on the contract details page.

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Let's take a moment to look over some EHE Initiative reporting requirements. There is an additional service category you'll see in the GCMS for EHE funding, Ending the HIV Epidemic Initiative Services. This EHE Initiative Services category is meant to capture EHE funded services that do not meet the definition of one of the other RWHAP service categories as defined in PCN #16-02. So, it's not there to just dump all your funding into this EHE service category because it's EHE funding. This is only for those services that don't meet the definition of one of the other RWHAP service categories.

So, if you're doing say Medical Case Management, that's Medical Case Management. If you're doing Mental Health, that's Mental Health. It's only when you're providing something outside of the scope of your regular RWHAP service categories that you should be using this EHE category. If you are using this EHE service category in any of your contracts, you need to be certain you're reporting this correctly. Please review PCN #16-02 to make sure what you're providing should truly be reported under EHE Initiative Services.

And if you have any questions about your services and which category they should be reported in, please contact Data Support. We can walk through and review all your services and make sure everything is being reported correctly. Again, the contact




information for Data Support will be displayed at the end of the presentation.

## EHE Administrative and Technical Services

- “Other” services should only be selected if a provider is funded for non-client services that don’t fall under an existing administrative service category
- Non-client services that fall under existing service categories should be reported under that specific category

8. If applicable, select the administrative and technical services that are funded for this contractor.

1. Planning or evaluation
2. Administrative or technical support
3. Fiscal intermediary support
4. Other fiscal services
5. Technical assistance
6. Capacity development
7. Quality management
8. Other



EHE initiative funding used to provide capacity development should be reported under Capacity Development.

Please also note the “Other” service category in question 8 of the GCMS contract details page. Agencies should select this service category if a provider is funded by their EHE initiative award to provide non-client services that do not meet the definition of one of the other administrative and technical service category definitions. Non-client services that fall under the definition of one of the existing service categories should be reported under that specific service category. For example, EHE initiative funding used to provide capacity development should be reported under Capacity Development.

# EHE Carryover Funding

- Organizations receiving EHE carryover funding are required to report on EHE carryover funded services on the EHE Triannual Report
- If you are funding a provider with EHE carryover funding , please reach out to Data Support for assistance setting up contracts
- EHE Carryover Funding Column in the GCMS will be implemented soon

**Services**

Select the core medical, essential support and EHE initiative services for this contract that are funded through EHE program. For each service category funded through EHE, enter a funding amount in the corresponding column. The award amount should reflect the current year and should not include carryover funds.

Done updating services

\* Your changes will not be saved until you select the "Save" button on the contract details page.

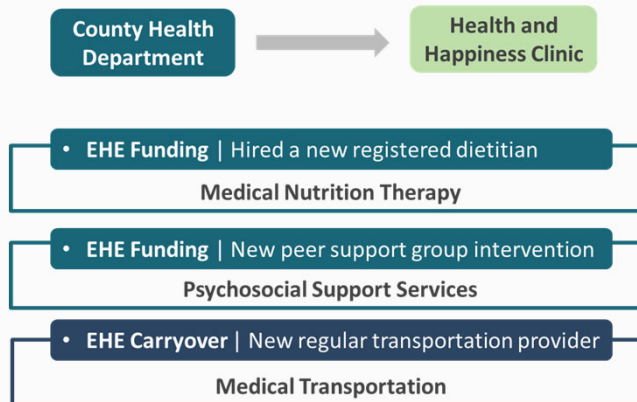
Service Name	EHE Funding	EHE Carryover Funding	Base	EHE Carryover Funding Amount
Service Category: Core Medical Services				
Outpatient/Ambulatory Health Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
AIDS Pharmaceutical Assistance	<input type="checkbox"/>	<input type="checkbox"/>		

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So, as previously stated every organization receiving EHE funding to provide EHE-funded services needs to have a contract in the GCMS. I want to clarify though that this also includes EHE carryover funding. Organizations who receive EHE carryover funding to provide services are required to report on those services in the EHE Triannual Report. If you are funding a provider with EHE carryover funding , please reach out to Data Support for assistance setting up contracts

Please note that the GCMS will be updated soon to display a column under question number 9 for recipients to mark services as funded with EHE Carryover funding as shown here on the slide. This feature won't be implemented for this upcoming reporting period, so we recommend contacting us here at Data Support for assistance with setting up contracts in the GCMS, if you're funding providers with EHE Carryover funding.

## EHE Services Example



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Let's take a look at an example that kind of combines all of this information to help demonstrate how you should be reporting.

Here we have our recipient, the County Health Department, and this recipient is funding a provider, Health and Happiness Clinic, with their EHE award and some EHE carryover funding. And here we have the actual services this provider is going to be putting this funding towards that they received. They are receiving EHE funding to hire a new dietitian, more EHE funding for a brand-new peer support group program intervention, and they are also now working with a local transportation provider to provide regular transportation to and from appointments for their clients using the EHE carryover funding that they received.

So, the recipient needs to enter these services into their contract for the year but what service categories do all of these actual services fall under? We should take a look at PCN #16-02 (which was linked on the last slide) and figure out where the services best fall. Our new dietitian looks like that falls under Medical Nutrition Therapy which according to PCN #16-02 includes "nutrition assessments and screenings, nutritional evaluations, supplements, and nutrition education and/or counseling based on a nutritional plan developed by a registered dietitian or other

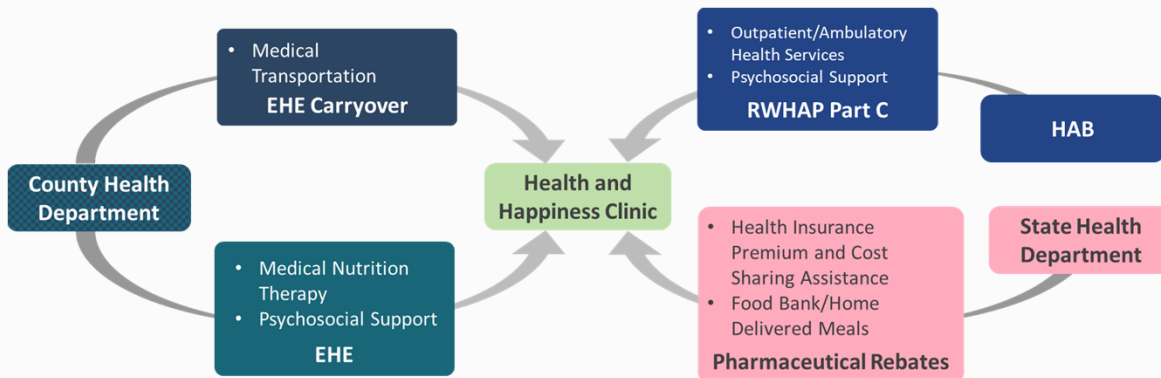
licensed nutrition professional.”

The new peer support program really looks like it could fit under Psychosocial Support Services since PCN#16-02 specifically mentions this service category includes “group or individual support and counseling services” including “HIV support groups.”

And then the new transportation provider we could list under Medical Transportation since that service category includes “contracts with providers of transportation services” in PCN #16-02. You’ll notice we did not once use the EHE service category even though this is EHE funding. That’s because even though we may have some new services here that were not offered by this provider previously, all of these services fit under the definition of one of the existing RWHAP service categories.

All this is to say that service categories and their definitions can be a source of a lot of confusion. And you want to make sure that if you have this EHE service category listed in your contracts that it truly is something that doesn’t fit into one of the other service categories. As I’ve stated before, please reach out to us at Data Support if you are struggling at all with service category definitions. We provide a lot of TA on this subject and know PCN #16-02 forwards and back.

## EHE Provider Report Example



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So, we'll continue on with our example from the previous slide. Let's say this provider has additional funding sources other than EHE which we mentioned before. We have our provider and then their services that they're receiving EHE funding to provide from the EHE recipient: Medical Nutrition Therapy for the dietitian and Psychosocial Support for the peer support program. And then we also have our EHE carryover funding for Medical Transportation which is the new transportation provider. Now if this provider was only receiving EHE and EHE carryover funding, no other RWHP or RWHP-related funding sources, then these are the services that they would need to be reporting on, reporting each HIV-positive client that received one or more of these services during the reporting period.

But as is often the case, let's say this provider has other RWHP funding sources. They have their own RWHP Part C grant they receive directly from HAB, and they use that funding to provide OAHS and Psychosocial Support. They receive RWHP-related funding in the form of pharmaceutical rebate dollars from the state to provide Health Insurance Premium and Cost Sharing Assistance and Food Bank/Home Delivered Meals.

Remember, only EHE-funded providers must complete the EHE Provider Report, but

they are reporting on all their RWHAP funding sources: RWHAP Parts A, B, C, and D; RWHAP-related funding (including program income and pharmaceutical rebates); and EHE funding. And just stick with me here I know we've got a lot of boxes up on the screen now.

## EHE Provider Services

<b>Part C</b>	Outpatient/Ambulatory Health Services	
<b>Rebates</b>	Health Insurance Premium and Cost Sharing Assistance	
<b>Rebates</b>	Food Bank/Home Delivered Meals	
<b>EHE</b>	<b>Part C</b>	Psychosocial Support
<b>EHE Carryover</b>	Medical Transportation	
<b>EHE</b>	Medical Nutrition Therapy	

Report all HIV-positive clients that received any of these direct services, regardless of payor

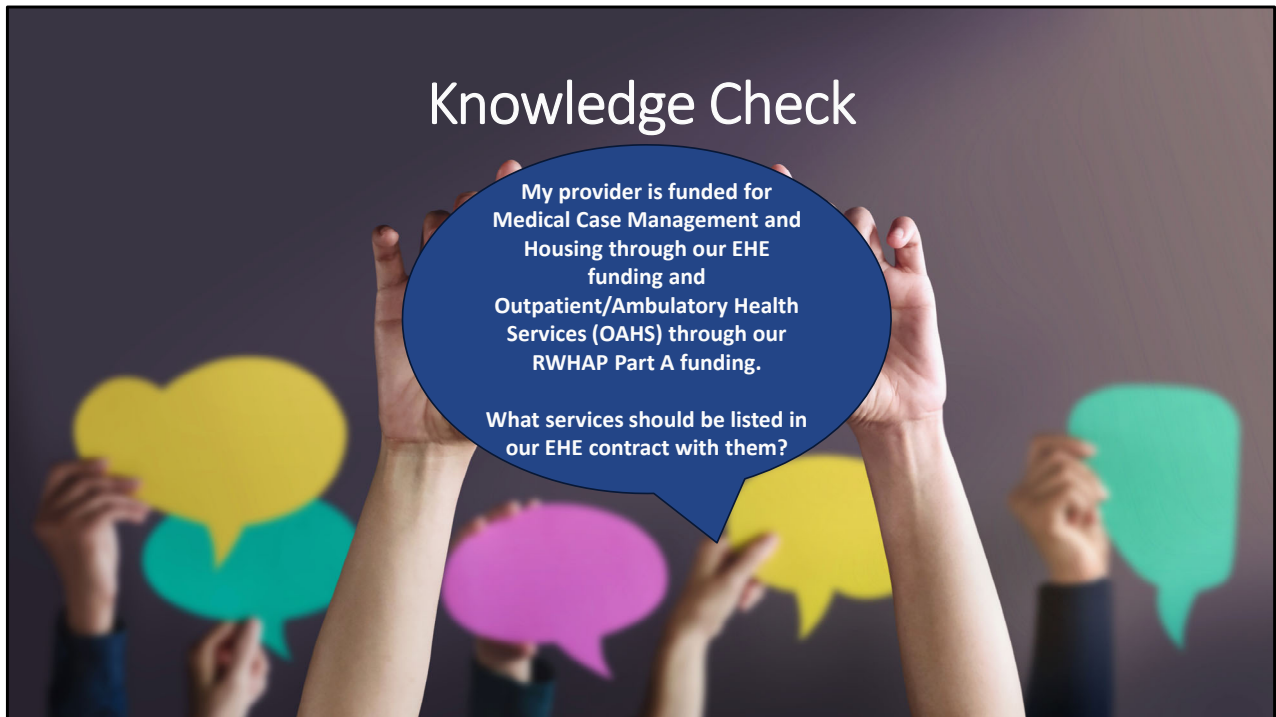
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So, this provider should take all of their RWHAP funding sources and end up with a list of services that they should be reporting on. So, we'll clear the screen here and compile a single list of all the services that should be reported on.

Now this provider is going to take all of their services that we've compiled and in their EHE Provider Report they are going to report all HIV-positive clients that received any of these services during the reporting period, regardless of payor. It does not matter which funding source that we have in the boxes here is funding the service, whether it's EHE or Part A. It does not matter who the final payor for the service was. And it does not matter whether or not the client is RWHAP-eligible. It is all HIV-positive clients.

I know this was kind of a lengthy example but hopefully this helps to clear up some of the confusion surrounding services and the data reported on the EHE Triannual Report. And I definitely recommend joining us for the EHE Provider Report webinar next week where we'll go over this a little more in depth, showing exactly how this translates into the data that are entered into the report.





Now, before we move further let's do a quick knowledge check to see if we have a basic understanding of how our EHE contracts should be entered.

My provider is funded for Medical Case Management and Housing through our EHE funding and Outpatient/Ambulatory Health Services (OAHS) through our RWHAP Part A funding. What services should be listed in our EHE contract with them? (Choose all that apply).


- a. Medical Case Management
- b. OAHS
- c. Housing
- d. EHE Initiative Services

Thanks Isia! So, the correct answer here would be Medical Case Management and Housing Services. Remember, only services funded with your EHE grant should be included in your EHE contract. Again, if anyone has questions on setting up EHE contracts please feel free to reach out to Data Support for assistance.

Let's continue!


# Creating the EHE Triannual Recipient Report

The screenshot displays the HRSA Electronic Handbooks interface. The main content area is titled "EHE Triannual Recipient Report Inbox" and shows a table with the following data:

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	EHE	UT8HA00000	County Health Department	5/01/2023-8/31/2023		Not Started		

The "Create" icon in the Action column is highlighted with a red box. Below the table, there is a pagination control showing "Page Size: 25" and "1 items in 1 pages".

For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the [HRSA Electronic Handbooks Contact Center help request form](#) to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to [RyanWhiteDataSupport@wrma.com](mailto:RyanWhiteDataSupport@wrma.com)

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter  
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click 

So, let's get back to our report. As shown here, we are in the EHE Recipient Report Inbox. To start your report, select the envelope icon under the Action column on the right side of your screen. For clarification, if the report has not been started this icon will say "create" as seen here. If you have already begun your report, this icon will say "open".

# General Information

The screenshot displays the 'EHE Triannual Recipient Report' interface. The top navigation bar shows the report title and a session expiration timer. Below this, a header section provides key report details: Report ID (12345), Status (Working), Due Date (10/15/2023 18:00), Report Period (5/1/2023-8/31/2023), Last Modified Date (8/5/2023 17:25:33), Access Mode (ReadWrite), and UEI (AB1CDE23FGH4). The main content area is titled 'General Information' and includes a disclaimer about pre-populated data. It features two sections: '1. Official Mailing Address' with fields for Street (888 Swamp Place), City (Duloc), State (DC), and Zip Code (12345 - 6789); and '2. Organization Identification' with fields for EIN (123456789) and UEI (AB1CDE23FGH4). A left-hand navigation menu lists various report actions and sections.

Field	Value
Report ID	12345
Status	Working
Due Date	10/15/2023 18:00
Report Period	5/1/2023-8/31/2023
Last Modified Date	8/5/2023 17:25:33
Access Mode	ReadWrite
UEI	AB1CDE23FGH4

**General Information**

The data shown below are pre-populated from the HRSA Electronic Handbooks (EHBs). Please verify that the information shown below is accurate. A field with an asterisk \* before it is a required field. Note: Updating the information in the EHE Triannual Recipient Report does not update your information in the EHBs. You must revise your agency's information in the EHBs as well.

**1. Official Mailing Address:**

- \* a. Street: 888 Swamp Place
- \* b. City: Duloc
- \* c. State: DC
- \* d. Zip Code: 12345 - 6789

**2. Organization Identification:**

- \* a. EIN: 123456789
- \* b. UEI: AB1CDE23FGH4

When you open your report, you'll be taken to the first section, General Information. This section, contains some general information about your organization including your organization's official mailing address, EIN, and UEI number.

# Contact Information

3. Contact information of person responsible for this submission:

\* a. Name:

\* b. Title:

\* c. Phone:

Extension:

d. Fax:

\* e. Email:

Further down the page you also have the contact information of the person responsible for this submission. You'll find most of the information on this page prepopulated when you open your report. Review each section for accuracy and make sure all required fields are completed and if you make any changes to the information here make sure to select "Save" down here on the bottom right corner.

# Program Information

The screenshot displays the 'EHE Triannual Recipient Report' interface. The left navigation panel includes 'Inbox', 'EHE Triannual Recipient Report', 'EHE Triannual Provider Report', 'EHE Recipient Report', 'General Information', and 'Program Information' (highlighted with a red box). The main content area shows report details for 'UT8HA00000 : County Health Department' and a 'Program Information' section. This section contains a table of providers with columns for Warning, Reg Code, Provider Name, Exempt, and Exemption Justification. The table lists three providers: County Health Department, Duloc Hospital, and Far Far Away Regional Clinic. Each row has an expand icon (+) on the left and an 'Exempt' checkbox on the right. A 'Cancel' button is at the bottom left and a 'Save' button is at the bottom right.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
<input type="checkbox"/>	11111	County Health Department	<input type="checkbox"/>	
<input type="checkbox"/>	22222	Duloc Hospital	<input type="checkbox"/>	
<input type="checkbox"/>	33333	Far Far Away Regional Clinic	<input type="checkbox"/>	

In the navigation panel on the left we will select “Program Information”, which brings us to the next section of our report. This section will list all of your EHE-funded providers for the reporting period as listed by the contracts in the GCMS. You can use the expand icon located to the left of each listing here to show the funded services for each organization. Review the information here for accuracy and if you need to make changes, you will have to make them to the contracts in the GCMS. You can get to the GCMS at any point by selecting “Search Contracts” again in the Navigation panel on the left side of the screen.

# Contract Synchronization

The screenshot displays the 'EHE Triannual Recipient Report' interface. At the top, a yellow warning banner states: 'Warning: The program information displayed below does not match the program information in the Grantee Contract Management system (GCMS). Click the provider name listed in blue font below or select the icon in the "Warning" column below to review the updates for each provider and, if correct, synchronize the information. To synchronize program information across all providers, click the "Synchronize All" button.' Below the warning, the report details for 'UT8HA00000 : County Health Department' are shown, including Report ID: 12345, Status: Working, Due Date: 10/15/2023 18:00, Report Period: 5/1/2023-8/31/2023, Last Modified Date: 8/5/2023 17:25:33, Access Mode: Read/Write, and UEL: AB1CDE23FGH4. The 'Program Information' section lists agencies with a 'Warning' column, 'Reg Code', 'Provider Name', 'Exempt' checkbox, and 'Exemption Justification' column. The table contains three rows: County Health Department (Reg Code 11111), Duloc Hospital (Reg Code 22222), and Far Far Away Regional Clinic (Reg Code 33333). A 'Synchronize All' button is highlighted in the warning banner.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
+	11111	County Health Department	<input type="checkbox"/>	
+	22222	Duloc Hospital	<input type="checkbox"/>	
+	33333	Far Far Away Regional Clinic	<input type="checkbox"/>	

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If you do make changes to your contracts after opening your report, you will have to synchronize those changes. You'll see this yellow warning banner at the top of the page once you have made your changes. You can either select the agency's name in blue to synchronize contracts individually or you can select "Synchronize All" to synchronize all changes at once.

We'll go ahead and select the "Synchronize All" button here.

# Contract Modification

The screenshot displays the 'EHE Triannual Recipient Report' interface. The left sidebar contains navigation options like 'Inbox', 'EHE Triannual Recipient Report', 'EHE Triannual Provider Report', and 'EHE Recipient Report'. The main content area shows report details for 'UT8HA00000 : County Health Department' with fields for Report ID, Status, Due Date, Report Period, Last Modified Date, Access Mode, and UE. Below this, a message states: 'Review the changes below and click the "Synchronize" button to synchronize these data. Synchronizing the contract will not impact the list of services in the EHE Triannual Provider Report.'

**The following contract(s) have been modified**

County Health Department (Contract ID: 123456)

Start Date: 3/1/2022  
End Date: 2/28/2023

Change	Service Name	Funding Type
Deleted	Housing	EHE
Unchanged	Administrative or technical support	EHE
Unchanged	Quality management	EHE
Unchanged	Outpatient/Ambulatory Health Services	EHE
Unchanged	Early Intervention Services (EIS)	EHE
Unchanged	Mental Health Services	EHE
Unchanged	Referral for Health Care and Support Services	EHE
Unchanged	Ending the HIV Epidemic Initiative Services	EHE

Buttons for 'Cancel' and 'Synchronize' are visible at the bottom of the table area.

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On the next page you'll see the changes that you made to your contract. Again, review the changes to make sure they are accurate and then select the "Synchronize" button to add the contract changes to your report.

We'll select the "Synchronize" button.

# EHE Contracted Providers

The screenshot displays the 'EHE Triannual Recipient Report' interface. The left navigation pane includes 'Inbox', 'EHE Triannual Recipient Report', 'EHE Triannual Provider Report', 'EHE Recipient Report', and 'Actions'. The 'Actions' menu has 'Validate' highlighted with a red box. The main content area shows report details for 'UT8HA00000 : County Health Department' and a 'Program Information' section with a table of contracted providers.

**Report Details:**

- Report ID: 12345
- Report Period: 5/1/2023-8/31/2023
- Access Mode: ReadWrite
- Status: Working
- Last Modified Date: 8/5/2023 17:25:33
- UEI: AB1CDE23FGH4
- Due Date: 10/15/2023 18:00
- Last Modified By: Spickels@countydept.gov

**Program Information:**

This item lists all of the agencies that had a contract with your organization during the reporting period. Verify the list is accurate. If a provider is missing, revise your list of contracts by selecting the "Search Contracts" link under the Manage Contracts heading in the left menu. If a provider listed will not submit a EHE Triannual Provider Report for the reporting period, select the checkbox in the Exempt column and enter a justification for the exemption in the text box that is displayed. NOTE: The exempt checkbox may only be selected if the organization's Provider Report is in "Not Started" or "Working" status.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
<input type="checkbox"/>	11111	County Health Department	<input type="checkbox"/>	
<input type="checkbox"/>	22222	Duloc Hospital	<input type="checkbox"/>	
<input type="checkbox"/>	33333	Far Far Away Regional Clinic	<input type="checkbox"/>	

Buttons: Cancel, Save

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And then we're taken back to the Program Information section with our changes added to the report. Make sure when you go to submit your Recipient Report that you do not see that yellow warning banner at the top of this page which means you have pending contract changes.

So, once your contracts are squared away and all organizations that provided EHE-funded services for the reporting period are listed here in your report, then you're ready to validate and certify.

To validate, select "Validate" in the Navigation panel on the left side of the screen.



# Validating the EHE Recipient Report

The screenshot displays the 'EHE Triannual Recipient Report' interface. The left navigation panel includes sections for 'Inbox', 'EHE Recipient Report', and 'Actions'. The 'Validate' button in the 'Actions' section is highlighted with a red box. The main content area shows report details for 'UT8HA00000 : County Health Department', including Report ID: 12345, Status: Working, and Due Date: 10/15/2023 18:00. A green message states: 'Your validation request has been scheduled. It may take several minutes to generate the report.' Below this is a red 'NOTE: You must refresh this page to display your results.' The bottom of the page contains contact information for the HRSA Help Desk and a login status: 'Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter'.

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Once you click “Validate,” the system will display a message letting you know that your validation request is processing. To view your results, refresh the page by selecting “Validate” again in the Navigation panel or refreshing the page manually in your web browser. We’ll go ahead and click “Validate” again.

# EHE Validation Confirmation

The screenshot displays the 'EHE Triannual Recipient Report' interface. The left navigation pane includes sections for 'Inbox', 'EHE Recipient Report', and 'Actions'. The 'Actions' section is expanded, showing 'Validate' and 'Certify' (highlighted with a red box). The main content area shows report details for 'UT8HA00000 : County Health Department' and a green confirmation message: 'Congratulations! Your data are valid. No errors, warnings, or alerts were found in your report.' Below this, there is contact information for HRSA and a note about Adobe Acrobat Reader.

Report ID: 12345	Status: Working	Due Date: 10/15/2023 18:00
Report Period: 5/1/2023-8/31/2023	Last Modified Date: 8/5/2023 17:25:33	Last Modified By: Spickels@countydept.gov
Access Mode: ReadWrite	UE: AB1CDE23FGH4	

Congratulations! Your data are valid. No errors, warnings, or alerts were found in your report.

For help with EHBs contact the HRSA Help Desk by phone at 1-877-G04-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the [HRSA Electronic Handbooks Contact Center help request form](#) to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to [RyanWhiteDataSupport@wvma.com](mailto:RyanWhiteDataSupport@wvma.com)

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter  
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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Once your validation has finished, you'll most likely come across this green congratulations message meaning you are ready to go ahead and certify your report. Alternatively, you may see a table with issues to correct. The EHE Triannual Recipient Report only has a few validation messages that are all errors, meaning they must be corrected before you can certify your report. So, if you receive a validation error, correct your report and revalidate before moving on to certifying.

We have the congratulations message, so we'll go ahead and move on to certifying. To get there, select "Certify" in the Navigation panel on the left side of the screen.

# Submitting the EHE Recipient Report

The screenshot displays the 'EHE Triannual Recipient Report' submission interface. On the left is a navigation menu with options like 'Inbox', 'EHE Triannual Recipient Report', 'EHE Triannual Provider Report', 'EHE Recipient Report', 'Actions', 'EHE Recipient Report - Reports', 'Action History', 'Manage Contracts', and 'Search Contracts'. The main content area shows report details: Report ID: 12345, Report Period: 5/1/2023-8/31/2023, Status: Working, Due Date: 10/15/2023 18:00, Last Modified Date: 8/5/2023 17:25:33, Last Modified By: Spickels@countydept.gov, Access Mode: ReadWrite, and UE: ABCDEFGH1234567. Below this is a 'Comments' section with a text box and a 'Certify Report' button. A checkbox is present with the text: 'certify that the data in this report is accurate and complete. I understand that reporting accurate and complete data is a condition of this grant award and is subject to federal audit.'

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On the certify report page, you will be required to enter a comment with any meaningful feedback you have about the submission process. Afterwards select the checkbox certifying the data are accurate and complete, and lastly, select the “Certify Report” button at the bottom of the page to complete the EHE Recipient Report Submission.

## Poll #2



Before we move on to discuss the submission timeline and TA resources, lets take one last poll question for the day.

In which areas does your organization need assistance with the EHE Triannual Report (select all that apply)?

- a. Service category definitions and/or setting up contracts
- b. Reporting requirements and completing the report
- c. Data systems and exporting your data
- d. Unsure
- e. Do not need assistance

Thanks Isia. So, for those who need assistance whether it be for Service Category definitions, questions about contracts, reporting requirements or questions regarding your data systems we can follow up with you after the webinar to provide some additional TA and help ease your concerns. And for anyone who doesn't need assistance now, always feel free to reach out if anything does indeed come up during the submission of your report. We are always here to help!

Let's move on to our EHE submission timeline and TA resources.

## EHE Submission Timeline

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Reporting Period	Opening Date	Closing Date
5/1/2023 – 8/31/2023	September 15, 2023	October 15, 2023
9/1/2023– 12/31/2023	January 15, 2024	February 15, 2024
1/1/2024 – 4/30/2024	May 15, 2024	June 15, 2024

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So here we have our EHE Triannual Report Submission timeline. The next opening will begin on Friday, September 15 and will be open for a month for agencies to submit data for the May 1, 2023, to August 31, 2023, reporting period. Looking ahead after that, the following opening will be January 15 to February 15 of 2024 and then May 15 to June 15 of 2024.

## TA Resources

TA Resource	Type of TA
<b>Ryan White Data Support</b> 1-888-640-9356 <a href="mailto:RyanWhiteDataSupport@wrma.com">RyanWhiteDataSupport@wrma.com</a>	<ul style="list-style-type: none"> <li>EHE Triannual Report Instruction Manual, reporting requirements, and allowable data element responses</li> <li>Managing contracts in the Grantee Contract Management System (GCMS)</li> <li>Accessing, completing, reviewing or accepting the EHE Triannual Provider Report through the RSR Web System</li> <li>Locating or adding providers in the RSR Web System</li> <li>Resolving validation errors in the Web System</li> <li>Submitting your EHE Recipient or Provider Report</li> </ul>
<b>Data Integration, Systems &amp; Quality (DISQ) Team</b> <a href="mailto:Data.TA@caiglobal.org">Data.TA@caiglobal.org</a> <a href="#">Submit a DISQ TA Request</a>	<ul style="list-style-type: none"> <li>Planning how to collect and report your data to meet reporting requirements</li> <li>Extracting data from your Electronic Health Record (EHR) or other data management system</li> <li>Mapping data to required data elements</li> <li>Developing year-long processes for data collection, management, quality, and utilization</li> </ul>
<b>EHBs Customer Support Center</b> 1-877-464-4772 <a href="#">Submit an EHBs TA Request</a>	<ul style="list-style-type: none"> <li>How to use the Electronic Handbooks (EHBs)</li> <li>Accessing the EHE Triannual Recipient Report through the EHBs</li> <li>RSR Web System registration or permissions</li> </ul>
<b>CAREWare Help Desk</b> 1-877-294-3571 <a href="mailto:cwhelp@jprog.com">cwhelp@jprog.com</a> <a href="#">Join the CAREWare listserv</a>	<ul style="list-style-type: none"> <li>Setting up contracts for your EHE-funded services in CAREWare</li> <li>Running an aggregate report to support completing the EHE Triannual Report using CAREWare</li> </ul>

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And then here are the additional technical assistance resources available to assist you. Ryan White Data Support addresses EHE-related content and submission questions such as interpretation of the manual and HAB’s reporting requirements, managing contracts, accessing and completing the EHE Recipient and Provider Reports, and validation issues. The DISQ Team, can help you with your EHE data including strategizing how to best collect and report your EHE data to meet reporting requirements, extracting your data and mapping it to the required data elements, as well as developing processes for data collection and management. The EHBs Customer Support Center addresses EHBs related questions such as navigation, EHBs account registration, and access and permissions. And finally, the CAREWare Help Desk can assist all you CAREWare users out there if you need some assistance utilizing CAREWare in submitting your EHE data like setting up your CAREWare contracts or running an aggregate report.

# TargetHIV Resources

## TargetHIV Website

- [EHE Triannual Report Instruction Manual](#)
- [EHE Triannual Report Submission Timeline](#)

## Sign up for the DISQ listserv



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And then of course, the TargetHIV website is always the place to go for additional information on the RWHAP. Here you'll be able to find the EHE Instruction Manual as well as this webinar which as Debbie mentioned at the beginning of our presentation will be posted on the TargetHIV website at a later date.

I also really want to highlight the EHE DISQ listserv. The EHE listserv helps to keep EHE recipients and providers in the loop about new EHE resources, reporting updates and upcoming events like this webinar. So, if you're interested in joining the listserv, go to [targethiv.org/disq/subscribe](http://targethiv.org/disq/subscribe), or follow the link on this slide. You'll come to the page shown on the slide here. You can enter your contact information \*\* and scroll all the way to the bottom here. Under the "Interests" section, \*\* select "EHE," and then \*\* click on the "Subscribe" button at the bottom of the page.




## Connect with HRSA

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To learn more about our agency,  
visit

[www.HRSA.gov](http://www.HRSA.gov)

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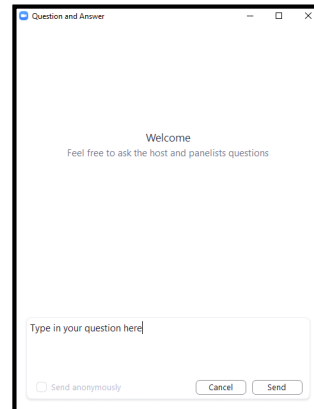
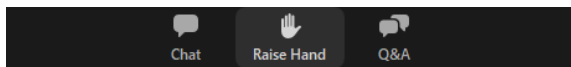
And then lastly, to find out more about HRSA, check out HRSA.gov. I'd like to thank everyone again for joining us on today's webinar and now we'll move onto the Q&A.

## Let's Hear From You!

- Please use the “raise hand” function to speak. We will unmute you in the order that you appear.

**OR**

- Type your question in the question box by clicking the Q&A icon on the bottom toolbar.

And now to your questions – but first, I would like to remind you that a brief evaluation will appear on your screen as you exit, to help us understand how we did and what other information you would have liked included on this webcast. We appreciate your feedback very much, and use this information to plan future webcasts. My DISQ colleague Isia is going to put a link out in the chat feature if you would prefer to access the evaluation right now. We'll also send a final reminder via email shortly after the webinar

As a reminder, you can send us questions using the “Question” function on your control panel on the right hand side of the screen. You can also ask questions directly “live.” You can do this by clicking the raise hand button (on your control panel). If you are using a headset with a microphone, Isia will conference you in; or, you can click the telephone button and you will see a dial in number and code. We hope you consider asking questions “live” because we really like hearing voices other than our own.

We do want to get all of your questions answered, and we do not usually run over an hour. If you have submitted your question in the question box and we cannot respond to your question today, we will contact you to follow up. We often need to explore

your question in order to give you the most appropriate answer.