

How to Complete the RSR Recipient Report Using the GCMS

Ryan White HIV/AIDS Program Services Report (RSR)

HIV/AIDS Bureau

November 8, 2023



Welcome to today's Webinar. Thank you so much for joining us today!
My name is Hunter Robertson. 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 the RSR.

Today's Webinar is Presented by:



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Today's Webinar is presented by Chris Van der Kaay from Ryan White Data Support, the experts on RWHP reporting requirements, and myself representing the DISQ team's work with client-level data. Chris will provide an overview of the step-by-step instructions for completing the RSR Recipient Report, including modifying contracts and using the GCMS. Recipients will also obtain an understanding of the RSR workflow process.

Throughout the 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 the presentation slides right now which include 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 recording. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar. The slides are already available for you to access on the TargetHIV website using the link that Isia just chatted out. Please note that these slides are not 508 compliant, but we will follow up with all registrants in about two weeks when the 508 compliant slides and written question and answer are posted.

Disclaimer

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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 over \$4 Million.

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 Chris.

Overview

RSR Recipient Report Introduction

Accessing the RSR Recipient Report

Reviewing your Contracts in the GCMS

Completing the Recipient Report

Validating and Certifying the Recipient Report

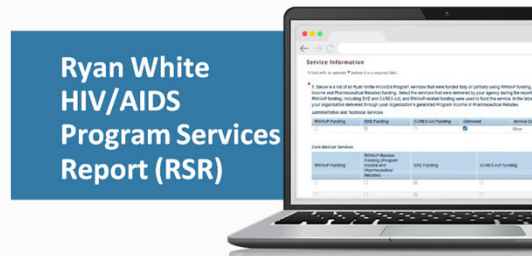
RSR Submission Timeline and TA Resources

Thanks Hunter! And Thank you everyone for joining us. In today's webcast, I will be going over how to complete the 2023 RSR Recipient Report. I will start by having an introduction to the RSR Recipient Report, including general background information and who should be completing it. We will then move on to accessing the RSR Recipient Report. I will then show you how to review your contracts using the Grantee Contract Management system, or GCMS, and go over the various sections of the recipient report that need to be completed. We will then look at how to validate and certify the recipient report. And to wrap up, we will go over the RSR submission timeline and the various technical assistance resources available to you.

GCMS and 2023 RSR Instruction Manuals



- [GCMS manual](#) available on the TargetHIV website



- [RSR manual](#) available on the TargetHIV website

Before I begin with an overview of the RSR, I would like to make everyone aware of the GCMS Instruction manual which is available on the TargetHIV website. This will provide you with step-by-step instructions on how to add any additional or missing contracts you may need for your Recipient report.

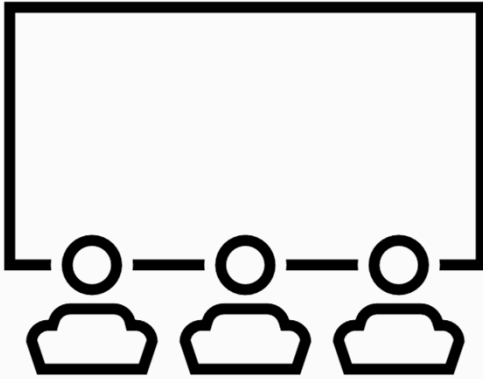
Also, the 2023 RSR Instruction manual is available on the TargetHIV website. The RSR manual is an invaluable resource that can be used when completing your report. The RSR manual covers the information outlined in this webinar today, and I strongly recommend looking over it before you complete your RSR. Both hyperlinks on this slide will take you to the respective manual pages.



Before we begin today's presentation on the RSR Recipient report, I am going to pass the presentation to Isia from the DISQ team to launch the first poll question for today.

Is this your first time working on the RSR Recipient Report?

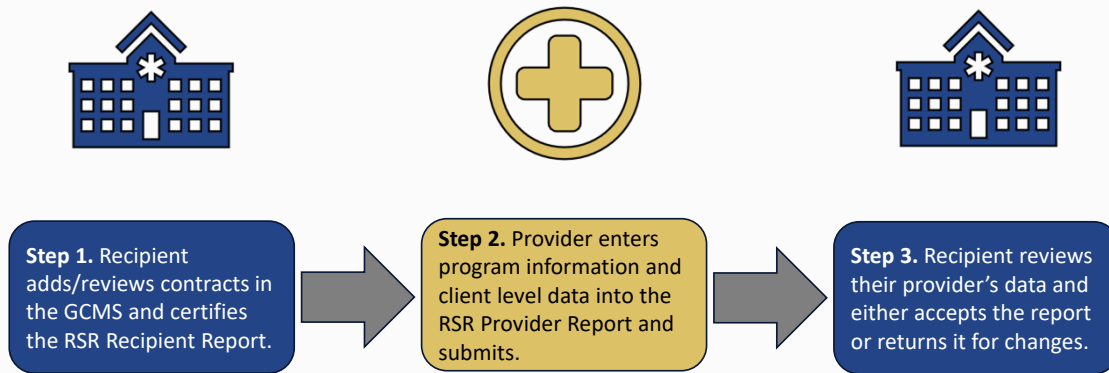
- a. Yes, this will be my first time working on the RSR.
- b. No, I have worked on the RSR once or twice before.
- c. No, I have worked on the RSR three times or more.



RSR Recipient Report Introduction

Now let's continue today's presentation by reviewing some of the background information about what the RSR Recipient Report is and who completes it.

RSR Reporting Process



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The Ryan White Services Report, or RSR, follows the process shown here on this slide. Let's take a minute to go through the steps. Direct grant recipients from HAB will add or review their contracts in the GCMS making sure they have a contract listed for each organization funded by their grant award during the reporting period. Those contracts will populate their RSR Recipient Report which they will then certify. This is step 1 in the RSR reporting process and is what we will be going over in more detail today.

Once the recipient has certified their Recipient Report, that information will then help generate an RSR Provider Report for each of their providers to submit. Providers will enter basic information about their program as well as their client-level data file into their RSR Provider Reports and submit. Once an RSR Provider Report has been submitted, the recipient will then review their provider's data and either accept it or return it back to the provider for changes.

RSR Recipient Report Background

- Two Sections
 - General Information
 - Program Information
- General Information section collects basic information about the recipient organization
- Program Information section displays service provider contract information
 - Verify that the organizations and services are accurate

There are two sections of the Recipient Report, the general information section and the program information section.

The General Information section displays basic information about the recipient organization. This information is prepopulated from the EHBs, however if there are any updates or changes, they can be made in this section of the report.

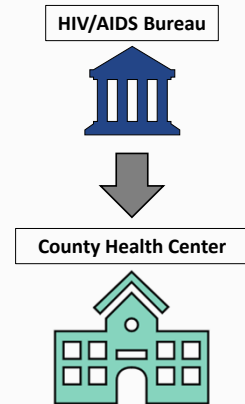
The other section of the recipient report is the Program information section. This is where you will see a list of all the organizations your agency has indicated to have provided Ryan White Services for the reporting period.

Recipient's will be able to look over and verify the accuracy of services listed for each organization incase there is information that is missing or needs to be changed.

More detail about both these sections will be provided further on in the presentation.

How Many Recipient Reports Do I Need to Complete?

- Recipients submit one Recipient Report for **each** grant received
- A recipient is an organization receiving RWHAP funding directly from HAB
- RWHAP funding can be distributed to providers and/or used directly

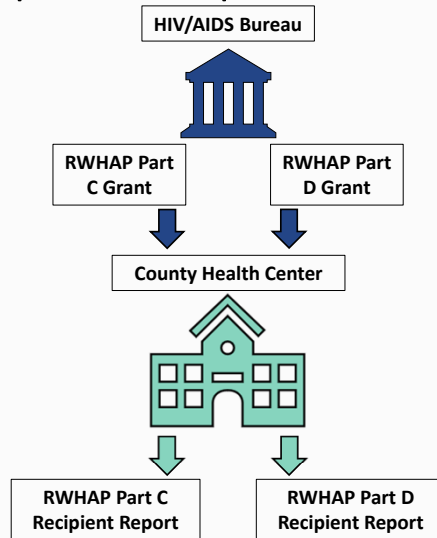


So how many recipient reports does an organization need to complete? If you are a grant recipient, your agency will submit one Recipient Report for each grant received.

And for those of you who are new to the Ryan White program and the RSR, the definition of a recipient is an organization that receives Ryan White Program funding directly from HAB.

Recipients can either provide direct client services themselves, which would classify them as a recipient-provider, distribute the funds to other providers, or a combination of both.

Recipient Report Example



If you look at the example on our slide here. Let's say that the grant recipient, in this case a County Health Center, received a Part C grant and a Part D grant directly from HAB. Because they receive these 2 grants, they will then complete both a Part C Recipient Report and a Part D Recipient Report. To put it simply, they will complete two separate Recipient Reports containing the grant information for the respective grant.

Quiz #1

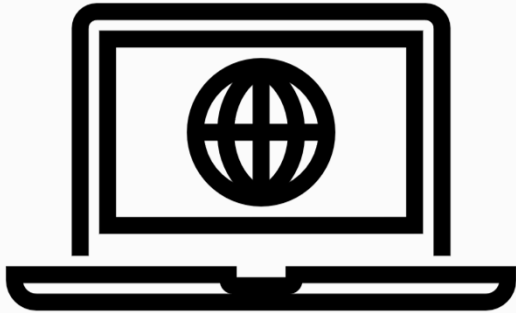


Before moving on to the next section of today's presentation, I am going to pass the presentation back to Isia to launch our first quiz of the day.

If an agency receives Part C funding directly from HAB and EHE funding from another Recipient. How many Recipient Reports will the agency need to complete?

- a) Zero Recipient Reports
- b) One Recipient Report
- c) Two Recipient Reports

The correct answer would be one Recipient report because the agency is receiving their Part C grant funding directly from HAB. However, they would not need to complete a recipient report for the EHE funding because that is coming from a different agency, and they are not receiving the funding directly from HAB.



Accessing the RSR Recipient Report

Now that we know who should be completing an RSR Recipient Report, we can move on to how you access your Recipient Report.

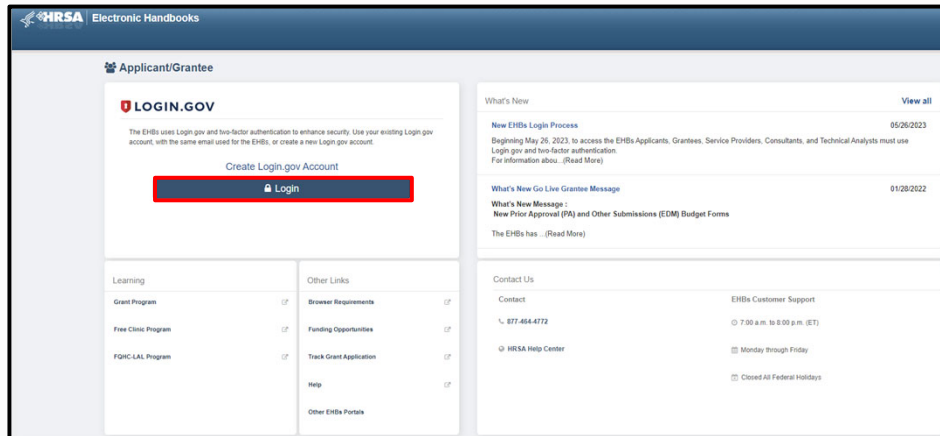
HRSA EHBs

HRSA Electronic Handbooks

 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 FQHC 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 CHGME 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.

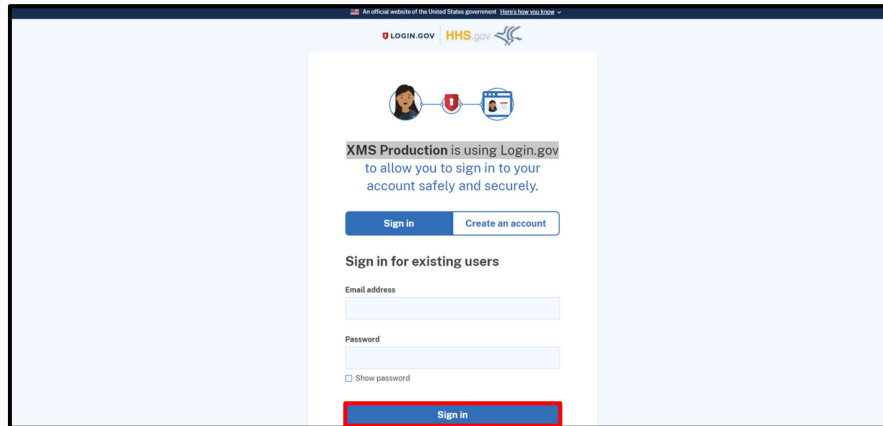
The first step to accessing the Recipient report is to access the correct login portal on the HRSA Electronic Handbooks, or EHBs. Recipients will use the “Applicant/Grantee” login link on the Grants.HRSA.Gov website page shown here.

Accessing the RSR Recipient Report



On the next page, you will be directed to login.gov. This is a change for this year's EHBs login process that recipients will have to go through when accessing the EHBs. Go ahead and click the login button here.

Signing in Through Login.Gov



The screenshot shows the Login.gov sign-in interface. At the top, it says "An official website of the United States government" and "https://login.gov". Below that are the "LOGIN.GOV" and "HHS.gov" logos. The main content area features a message: "XMS Production is using Login.gov to allow you to sign in to your account safely and securely." There are two buttons: "Sign in" (highlighted in blue) and "Create an account". Below this is a section titled "Sign in for existing users" with input fields for "Email address" and "Password", and a checkbox for "Show password". A "Sign in" button is located at the bottom of this section, highlighted with a red border.

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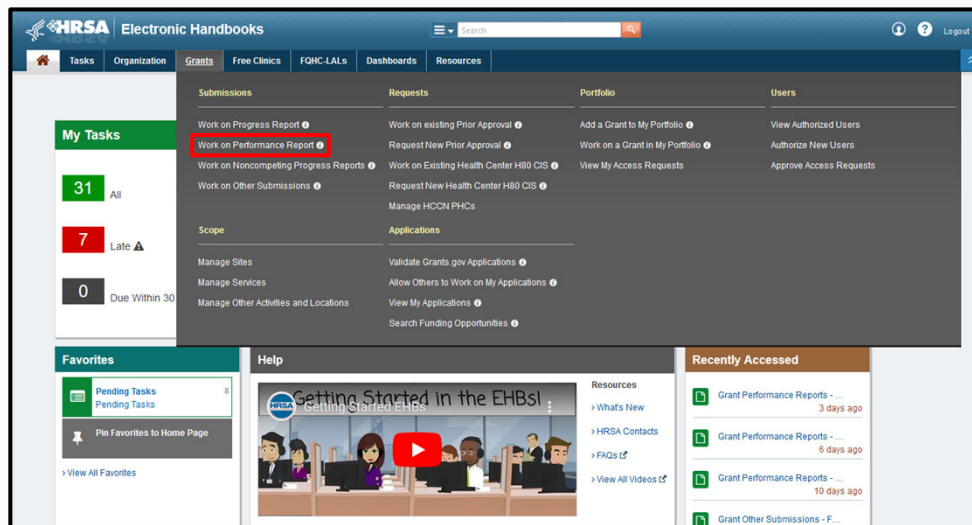
Next, you will enter your login.gov credentials and select “Sign in”. You will also be prompted to put in your two-factor authentication on the following page. Once you have done so this will then take you to the EHBs home page.

HRSA EHBs Home Page

The screenshot displays the HRSA Electronic Handbooks (EHBs) Home Page. The navigation bar at the top includes tabs for Tasks, Organization, Grants (highlighted), Free Clinics, FOHC LALs, Dashboards, and Resources. The main content area is organized into several sections:

- My Tasks:** Shows 31 All tasks, 7 Late tasks, and 0 tasks due within 30 days.
- Tracking:** A table listing submitted tasks with columns for Category, Submitted Tasks, Submitted Date, and Status.
- Smart Assist:** A section for action items, including "Change Project Director (PD)", "Remove user from an organization", "Remove user permissions for a grant", and "Request a submission deadline extension".
- Favorites:** A section for "Pending Tasks" and "Pin Favorites to Home Page".
- Help:** A section featuring a video titled "Getting Started in the EHBs!".
- Resources:** A section for "What's New", "HRSAs Contacts", and "FAQs".
- Recently Accessed:** A section for "Grant Performance Reports" and "Grant Other Submissions".

From the EHBs home page shown here. Your next step will be to hover over the "Grants" tab at the top.



On the drop-down menu, select “Work on Performance Report” under the “Submissions” header.

Submissions – All Page

The screenshot displays the 'Submissions - All' page. On the left is a navigation menu with categories like 'ALL TASKS', 'All Entities', 'Tasks', 'Grants', 'Requests', 'Submissions', and 'User Access Requests'. The main content area includes search filters for 'Basic Search Parameters' (Grant Number, Submission Name, Submission Tracking, Submission Deadline, Organization, Submission Type) and 'Advanced Search Parameters'. Below the filters are 'Display Options' (Sort Method, Search Name) and an 'Export To Excel' button. A table at the bottom shows a list of submissions with columns: Submission Name, Submission Type, Organization, Grant #, Tracking #, Reporting Period, Deadline, Submitted Date, Status, and Options. The first row is highlighted, and a red box highlights the 'Start' button in the 'Options' column.

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
RSR 2023 Annual Performance Report	Performance Reports	Health and Happiness Clinic	HTH-H00000		1/1/2023 - 12/31/2023	03/25/2024		Not Started	Start

This will take you to the “Submissions All” page with a list of this year’s performance reports, as well as previous years. On the bottom of the “Submissions All” page, under “Submission Name,” locate your most recent RSR submission. Once you’ve located the recipient report you wish to work on, select the “Start” button listed under the “Options” header. If you’ve already begun working on your RSR, this link will instead say “Edit.”

Accessing the RSR Inbox

NAVIGATION << RSR Recipient Report Inbox Your session will expire in: 28:53

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	Part C	H76HA00000	Health and Happiness Clinic	RSR 2023 Annual		Not Started	Create	History

Page Size: 25 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

After clicking the link, you will be taken to your RSR Recipient Report Inbox. Depending on your browser's settings, this page may load in a new window.

We've now successfully navigated to the RSR inbox, but before you begin your Recipient Report, we highly recommend you ensure the contracts your agency has entered for the year 2023 are complete and accurate in the GCMS.

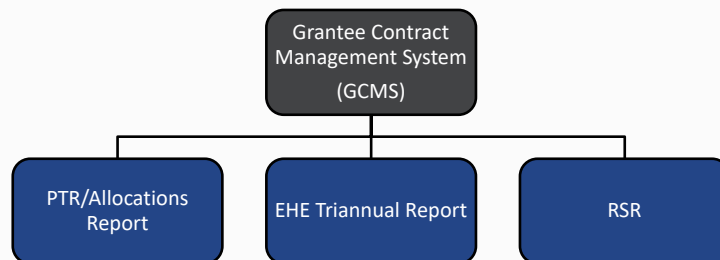


Reviewing Your Contracts in the GCMS

To help get a better understanding of what I mean by contracts, let's begin by reviewing what the GCMS is.

What is the Grantee Contract Management System (GCMS)?

- A data-storage system for RWHAP contract information
- Multiple reports are populated with the information entered



The Grantee Contract Management System, or GCMS, is a data-storage system for Recipient's Ryan White contract information. Information about a recipient's contracts are entered into the GCMS and maintained in this one place to decrease the data-entry burden.

From this contract information, multiple data reports such as the PTR/Allocations report, the EHE Triannual Report, and the RSR are populated with the information entered in the GCMS. Within the GCMS, you will be able to add new contracts, as well as modify, copy, or delete existing ones.

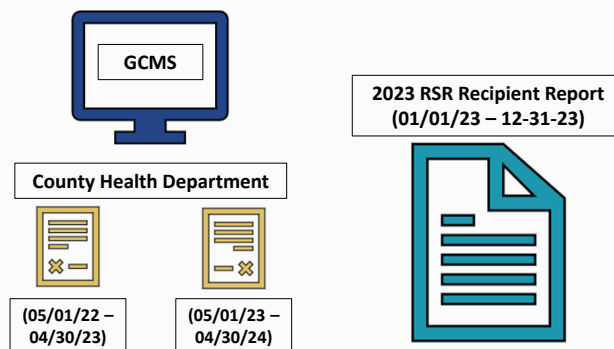
How does the GCMS Relate to the RSR?

- The 2023 RSR Recipient report imports information from GCMS contracts.
- Any contract information that overlaps with the 2023 calendar year.



For your 2023 RSR Recipient report, all Ryan White and Ryan White related funded services for your providers will be pulled directly from the GCMS. This will include any contract that overlaps with the 2023 calendar year.

Example of how the GCMS Relates to the RSR



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If you look at the example here, let's say that we fund a County Health Department for services and we therefore have contracts for them in the GCMS. We can see that this agency has two contracts that dip into the 2023 calendar year with a contract period from May 1st to April 30th. These dates entered in your contracts are based on the budget period listed on your Notice of Award. The RSR Recipient report will then import contract information from both contracts shown here because both contain information from the year 2023.

Essentially, if a contract is within the year 2023, it will import those listed services for that provider in the 2023 RSR recipient report.

Reviewing Contracts in the GCMS

- Available year-round
- Contracts should be in the system, but it is important to review them for accuracy
 - Entered before submission of the EHE Triannual Report, and PTR/Allocations Reports
 - Contracts for RWHAP Part B Supplemental Recipients may not yet be complete
- [GCMS Webinar](#)
- [GCMS Instruction Manual](#)

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As a reminder, the GCMS is available year-round, which allows recipients to regularly review and update contract information.

Contracts for Ryan White recipients should already be in the system by your agency before the completion and submission of the PTR/Allocations Report. As a note, Part B Supplemental PTRs are not due until the end of December, so contracts may not yet be complete for Part B supplemental recipients.

Although these contracts have been added by you or someone else within your agency, you should still review them to ensure the data reported are still correct. There may have been contract changes since those reports were submitted.

For a more in-depth overview of the GCMS, I highly recommend looking at the Completing the GCMS webinar and the GCMS Instruction Manual on the TargetHIV website, both of which I have linked on this slide.

While I won't be going over the process of adding or modifying contracts in the GCMS, I did want to quickly show you how to navigate to the correct page to be able to review your contracts and make changes if needed.

Navigating to the GCMS

NAVIGATION << RSR Recipient Report Inbox Your session will expire in: 28:53

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	Part C	H76HA00000	Health and Happiness Clinic	RSR 2023 Annual		Not Started	Create	History

Page Size: 25 1 items in 1 pages

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Back on the RSR Inbox page, we are going to click that “Search Contracts” button on the left navigation panel.

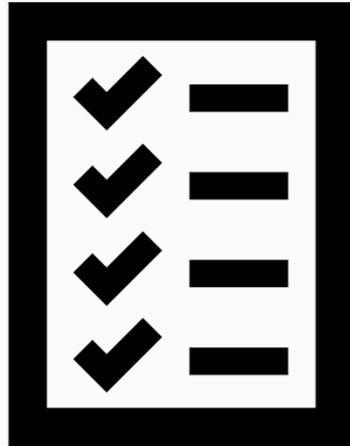
GCMS Search Page

The screenshot displays the HRSA Electronic Handbooks interface for the Grantee Contract Management System. The search form includes the following fields:

- Grant Number: H76HA00000
- Org ID: (comma separated list)
- Registration Code: (comma separated list)
- Organization Name
- Funded Through
- Contract ID: (comma separated list)
- Reference
- Range Start Date
- Range End Date
- Project Officer: All Project Officers

Buttons for 'Reset' and 'Search' are located at the bottom of the form. A red box highlights the 'Range Start Date' and 'Range End Date' fields.

Clicking on “Search Contracts” will take you straight to the GCMS, showing the page displayed on this slide. Here we can see a list of different search fields that we can use to locate our agency’s contracts, including the organization name, registration code, and contract dates. Your grant number will be auto populated in the grant number search field. If you search using a start and end date range for the 2023 calendar year. Our search results will only include contracts that were funded at any time during 2023 with this grant. However, you can limit or expand your search by including more or less information in the search fields. If at any time you need assistance while navigating through the GCMS. Please reach out to us at Ryan White Data Support and we can help you out. Our contact information will be shown at the end of this presentation



Completing the Recipient Report

Now that you are finished looking through your contracts and made any corrections if needed, it is time for the next step: creating and completing the RSR Recipient Report.

Creating the RSR Recipient Report

NAVIGATION << RSR Recipient Report Inbox Your session will expire in: 28:53

Inbox



- Recipient Report**
- Provider Report
- Check your XML

Manage Contracts

- Search Contracts

Search

- Recipient Reports
- Provider Reports

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	Part C	H76HA00000	Health and Happiness Clinic	RSR 2023 Annual		Not Started		

Page Size: 25

1 items in 1 pages

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To create the Recipient Report you will need to navigate back to the “RSR Recipient Report Inbox”, which can be done at any time by clicking the “Recipient Report” link on the left-hand navigation bar under the Inbox header. On this page, you will see your 2023 RSR Recipient Report. Click the “Create” envelope icon on the right side of your screen to begin working on the Recipient Report. If you have already started your recipient report, this icon will instead say “open”.

General Information Page

NAVIGATION << RSR Recipient Report Your session will expire in: 29:50

H76HA00000 : HEALTH AND HAPPINESS CLINIC

Report ID: 000000 Status: Working Due Date:

Report Period: RSR 2023 Annual Last Modified Date:

Access Mode: ReadWrite UEI: AB123C4D56EF Locked By:

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 RSR 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: 1234 North Street
- * b. City: NORTHWAY
- * c. State: DC
- * d. Zip Code: 12345 - ____

2. Organization Identification:

- * a. EIN: 123456789
- * b. UEI: AB123C4D56EF

Once you click “Create,” you will be taken to the first section of the Recipient Report, the “General Information” page. You must provide a response for every field with a red asterisk. Start by filling in any missing address or organization information not pre-populated already in the web system.

General Information Page: Contact Information

3. Contact information of person responsible for this submission:

* a. Name:

* b. Title:

* c. Phone:

Extension:

d. Fax:

* e. Email:

For question 3, put the contact information of the person responsible for the Recipient Report submission. For this question, please enter the name of the person who is completing the report, as this is the contact information we'll use if we have any questions about your RSR submission.

General Information Page: Minor AIDS Initiative designation

- RWHAP Part C and D Recipients Only
 - Did your agency receive a Minority AIDS Initiative (MAI) designation during the reporting period?

* 4. Did you receive a Minority AIDS Initiative designation for your Part C or D grant (documented on your Notice of Award) at any time during the reporting period?

No

Yes

If yes, please specify the most recent percentage designation for the reporting period:

For Ryan White Part C and D recipients, there will be an additional 4th question on the general information page. Question 4 asks you to indicate whether your agency received a Minority Aids Initiative designation during the reporting period. If your agency did receive MAI funding, specify the most recent percentage designation for the reporting period, incase you are unsure of where to find this information, it can be found on your notice of award. And again, this question is for part C and D recipients only. Once you have made updates and completed this page, click the "Save" button, in the bottom right corner.

Accessing the Program Information Page

The screenshot displays the 'RSR Recipient Report' interface for 'H76HA00000 : HEALTH AND HAPPINESS CLINIC'. The top navigation bar includes a search bar, a session expiration timer (29:50), and a dropdown menu for the clinic name. Below this, a summary section shows report details: Report ID: 000000, Status: Working, Due Date, Report Period: RSR 2023 Annual, Last Modified Date, Access Mode: ReadWrite, UEI: AB123C4D56EF, Last Modified By, and Locked By. The main content area is titled 'General Information' and contains a note about data pre-population from HRSA Electronic Handbooks (EHBs). Below the note is a section for '1. Official Mailing Address:' with four required fields: 'a. Street:' (1234 North Street), 'b. City:' (NORTHWAY), 'c. State:' (DC), and 'd. Zip Code:' (12345 - ____). The left navigation panel is visible, with 'Program Information' highlighted in a red box under the 'Recipient Report' section.

The next section of the recipient report is the program information section, go ahead and click the “Program Information” tab on the left navigation panel to get there.

Program Information Page

RSR Recipient Report Your session will expire in: 29:50

▼ H76HA00000 : HEALTH AND HAPPINESS CLINIC

Report ID: 000000 Status: Working Due Date:
Report Period: RSR 2023 Annual Last Modified Date:
Access Mode: ReadWrite UEI: AB123C4D56EF Locked By:

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 RSR 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
+	00000	HEALTH CENTER	<input type="checkbox"/>	
+	11111	HEALTH CO.	<input type="checkbox"/>	

Cancel Save

On the Program Information page, you will see a list of the agencies that your organization has a contract with for the reporting period. To the left of each contract is an expand icon.

Program Information Page: Exemptions

The screenshot displays the 'RSR Recipient Report' interface for 'H76HA00000 : HEALTH AND HAPPINESS CLINIC'. The page includes a navigation sidebar on the left with options like 'Inbox', 'Recipient Report', and 'Recipient Report Actions'. The main content area shows report details such as 'Report ID: 000000', 'Report Period: RSR 2023 Annual', and 'Access Mode: ReadWrite'. Below this is the 'Program Information' section, which contains a table of providers. Two rows in the table are highlighted with red boxes, indicating the focus of the document. The first row shows a provider named 'HEALTH CENTER' with a 'Warning' icon and an 'Exempt' checkbox. The second row shows a provider named 'HEALTH CO.' with a 'Warning' icon and an 'Exempt' checkbox. Both rows have an 'Exemption Justification' text field next to the 'Exempt' checkbox. The table also includes columns for 'Warning', 'Reg Code', and 'Provider Name'. The 'Warning' column contains a minus sign icon. The 'Reg Code' column contains '00000' for the first row and '11111' for the second row. The 'Provider Name' column contains 'HEALTH CENTER' and 'HEALTH CO.'. The 'Exempt' column contains checkboxes. The 'Exemption Justification' column contains text boxes. The table also includes a 'Cancel' button and a 'Save' button.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
	00000	HEALTH CENTER	<input type="checkbox"/>	
	11111	HEALTH CO.	<input type="checkbox"/>	

Clicking on the expand icon will display all Ryan White funded services and Ryan White-Related funded services for this provider.

All this information is populated from the GCMS. So, if you are missing any providers in this list or need to modify any of the services, you will need to return to the GCMS and edit the associated contracts there.

In the table on the right, you'll also see the "Exempt" and "Exemption Justification" columns. To exempt a provider that meets the exemption criteria, simply check this box. This opens the "Exemption Justification" text field, where you must explain why this provider is exempt. If you are unsure if your provider qualifies for an exemption, I highly recommend checking out the RSR Reporting Updates and Best Practices webinar that was presented a little while ago that is available on the TargetHIV website. You can also find a full list of the exemption criteria in the RSR Instruction Manual.

Please note that exempting a provider does not exempt the recipient from collecting and reporting that provider's data on their behalf. Recipients must make sure that exempted providers' data are still reported to the HAB.

Program Information: Pending Changes

The screenshot shows the 'RSR Recipient Report' interface. At the top right, it says 'Your session will expire in: 29:16'. A yellow warning banner at the top contains the following text: '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. FAMILY HEALTH (Added) Synchronize All'. Below the warning, the header for 'H76HA00000 : HEALTH AND HAPPINESS CLINIC' is shown. Metadata includes Report ID: 000000, Status: Working, Due Date, Report Period: RSR 2023 Annual, Last Modified Date, Access Mode: ReadWrite, UEI: AB123C4D56EF, Last Modified By, and Locked By. The 'Program Information' section contains a text block explaining that the list shows agencies with contracts during the reporting period and provides instructions on how to handle missing providers or exemptions. Below this is a table with columns: Warning, Reg Code, Provider Name, Exempt, and Exemption Justification. The table has one row for 'HEALTH CENTER' with a plus icon in the Warning column and an unchecked checkbox in the Exempt column.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
+	00000	HEALTH CENTER	<input type="checkbox"/>	

If you made any changes to your contracts in the GCMS after starting your recipient report, You'll see this yellow warning banner at the top of the page.

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. For our example today we'll go ahead and select the "Synchronize All" button here.

Synchronizing Changes

NAVIGATION << Search

RSR Recipient Report Your session will expire in: 29:50

▼ H76HA00000 : HEALTH AND HAPPINESS CLINIC

Report ID: 000000 Status: Working Due Date:
Report Period: RSR 2023 Annual Last Modified Date:
Access Mode: ReadWrite UEI: AB123C4D56EF Last Modified By:
Locked By:

Review the changes below and click the "Synchronize" button to synchronize these data.

The following contract(s) have been added

▶ FAMILY HEALTH (Contract ID: 000000)

Start Date: 1/1/2023
End Date: 12/31/2023

Change	Service Name	Funding Type
Added	Outpatient/Ambulatory Health Services	RWHAP
Added	Home Health Care	RWHAP
Added	Mental Health Services	RWHAP

Cancel Synchronize

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

Logged in as: GranteeDataSubmitter, GranteeDataEditor, GranteeDataViewer

This will open the synchronization window, where you'll see any contract modifications you made in the GCMS. The list will include any service categories added or deleted, and those that were left unchanged. If the information is correct, click the "Synchronize" button at the bottom right of the screen.

Program Information Page: Changes Made

NAVIGATION << RSR Recipient Report Your session will expire in: 29:50

H76HA00000 : HEALTH AND HAPPINESS CLINIC

Report ID: 000000 Status: Working Due Date:
Report Period: RSR 2023 Annual Last Modified Date:
Access Mode: ReadWrite UEI: AB123C4D56EF Locked By:

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 RSR 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"/>	00000	HEALTH CENTER	<input type="checkbox"/>	
+ <input type="checkbox"/>	11111	HEALTH CO.	<input type="checkbox"/>	
+ <input type="checkbox"/>	22222	FAMILY HEALTH	<input type="checkbox"/>	

NAVIGATION << Search

Inbox

- Recipient Report
- Provider Report
- Check your XML

Recipient Report

Navigation

- General Information
- Program Information

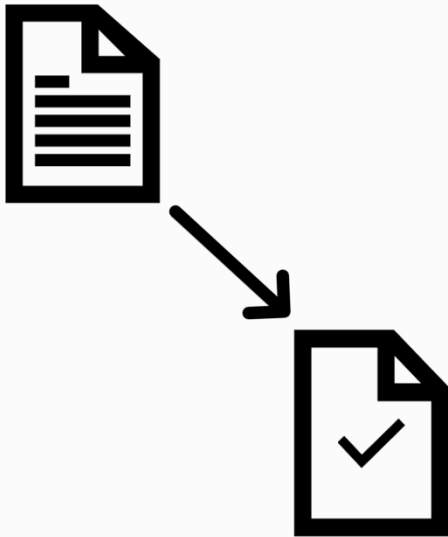
Recipient Report Actions

- Validate
- Certify
- Request
- Decertification
- Release Lock
- Print

Recipient Report -

We're then 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.

Please note that you can minimize the amount of time you spend going back and forth between the Recipient Report and the GCMS if you ensure your contracts are set up correctly in the GCMS before you create your Recipient Report.



Validating and Certifying the Recipient Report

We have now finished reviewing our contracts and the various sections of the report which means it is time for the final step for completing the Recipient Report, validating and certifying.

Navigating to Validate the Recipient Report

The screenshot displays the 'RSR Recipient Report' interface for 'H76HA00000 : HEALTH AND HAPPINESS CLINIC'. The top navigation bar includes a search field, the report title, and a session expiration timer showing '29:50'. The left-hand navigation menu is expanded to show 'Recipient Report Actions', where the 'Validate' option is highlighted with a red box. Other options in the menu include 'Certify', 'Request', 'Decertification', 'Release Lock', and 'Print'. The main content area shows report details: Report ID: 000000, Status: Working, Report Period: RSR 2023 Annual, Last Modified Date, Access Mode: ReadWrite, UEI: AB123C4D56EF, and Locked By. Below this is the 'Program Information' section, which includes a descriptive paragraph and a table of agencies. The table has columns for Warning, Reg Code, Provider Name, Exempt, and Exemption Justification. Three agencies are listed: HEALTH CENTER (Reg Code 00000), HEALTH CO. (Reg Code 11111), and FAMILY HEALTH (Reg Code 22222). Each row has a plus sign in the Warning column and an unchecked checkbox in the Exempt column. At the bottom of the table area are 'Cancel' and 'Save' buttons.

Warning	Reg Code	Provider Name	Exempt	Exemption Justification
+	00000	HEALTH CENTER	<input type="checkbox"/>	
+	11111	HEALTH CO.	<input type="checkbox"/>	
+	22222	FAMILY HEALTH	<input type="checkbox"/>	

Once your Recipient Report is complete and correct, you must validate your report by selecting "Validate" in the Navigation panel on the left.

Validating the Recipient Report

The screenshot displays the 'RSR Recipient Report' interface for 'H76HA00000 : HEALTH AND HAPPINESS CLINIC'. The page includes a navigation sidebar on the left with a search bar and sections for 'Inbox', 'Recipient Report', and 'Recipient Report Actions'. The 'Validate' option in the 'Recipient Report Actions' section is highlighted with a red box. The main content area shows report details: Report ID: 000000, Status: Working, Report Period: RSR 2023 Annual, Last Modified Date, Access Mode: ReadWrite, UEI: AB123C4D56EF, and Locked By. A message states: 'Your validation request has been scheduled. It may take several minutes to generate the report.' Below this is a note: 'NOTE: You must refresh this page to display your results.' At the bottom, there is contact information for the HRSA Help Desk and a footer indicating the user is logged in as 'GranteeDataSubmitter, GranteeDataEditor, GranteeDataViewer'.

The following page will tell you that your request has been scheduled and may take several minutes to generate the validation report. Allow the system to validate for a few minutes, and then refresh the page by selecting “validate” again on the navigation panel or by refreshing the page manually in your web browser. If your request has been completed, you will see your validation results. If it is not complete, continue waiting and then refresh the page again.

Recipient Report Validation Page

NAVIGATION << RSR Recipient Report Your session will expire in: 29:50

H76HA00000 : HEALTH AND HAPPINESS CLINIC

Report ID: 000000	Status: Working	Due Date:
Report Period: RSR 2023 Annual	Last Modified Date:	Last Modified By:
Access Mode: ReadWrite	UEI: AB123C4D56EF	Locked By:

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-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

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

NAVIGATION

Search

Inbox

- Recipient Report
- Provider Report
- Check your XML

Recipient Report

Navigation

- General Information
- Program Information

Recipient Report Actions

- Validate
- Certify**
- Request Decertification
- Release Lock
- Print

After refreshing, if you receive this congratulations message, then your report is ready to move forward and be certified.

Alternatively, you may see a table with validations to correct. The RSR Recipient Report only has a few validation messages that can populate, and they are all classified as 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.

A complete list of data validations can be found on the TargetHIV website and will also be in the resource document.

Since we have this congratulations message, 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.

Certifying the Recipient Report

The screenshot shows a web application interface for certifying a Recipient Report. The page title is "RSR Recipient Report" and the session will expire in 29:50. The user is logged in as "H76HA00000 : HEALTH AND HAPPINESS CLINIC". The report details are as follows:

Report ID:	Status:	Due Date:
000000	Working	

Report Period: RSR 2023 Annual
Access Mode: ReadWrite
Last Modified Date:
Last Modified By:
UEI: AB123C4D56EF
Locked By:

A field with an asterisk * before it is a required field.
Please enter comments regarding your certification.

* Comments

Design Preview

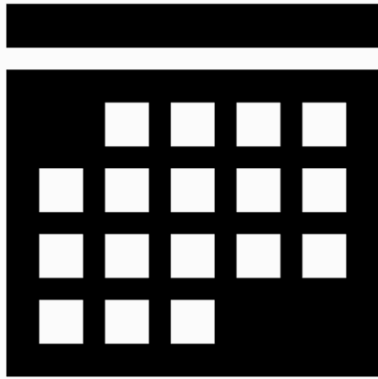
Characters remaining: 3000

I 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 in the text box and click the box underneath indicating that you certify that the information is accurate. All RSR comments are reviewed, so be sure to add any meaningful feedback you have about your submission. Your comment could be about a suggestion for next years RSR, or it could address something within this year's report. Finally, click the certify report button and your report will advance to certified status.

We encourage recipients to try and certify their Recipient Reports as soon as possible after the RSR Web System opens. It's important to note that providers cannot submit their RSR Provider Report and client-level data until their recipients certify their RSR Recipient Report.



RSR Submission Timeline and TA Resources

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We have now made it through all the components required for the 2023 RSR Recipient Report. Before I finish today's Webinar, let's take a look at this year's submission timeline as well as the RSR and technical assistance resources available to help you with your 2023 submission.

2023 RSR Submission Timeline

Date	Recipients	Providers
Available Year-Round	GCMS is open for recipients to enter their contract and service information	
Monday, December 4, 2023	Recipient Report Start Date	--
Monday, February 5, 2024	Recipient Report Due Date	Provider Report Start Date
Monday, March 4, 2024	--	Provider Report Target Date
Monday, March 18, 2024	Return for Changes Deadline	--
Monday, March 25, 2024	All RSRs must be in "Submitted" status by 6pm ET	

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As previously mentioned, the GCMS is available year-round for contract revision. The RSR Recipient report opens on December 4th. The Recipient Report deadline is February 5th and also marks the opening of the 2023 RSR Provider report. As a reminder, providers will not be able to submit their Provider Reports until the Recipient Report is in "Certified" status.

March 4th is the target deadline for the RSR Provider Report. Completing this report early allows the recipient more time to check for completeness and return the report for changes if necessary.

March 18th is the final day for recipients to return their provider's reports for changes.

And the final RSR deliverable is due on March 25th at 6 p.m. Eastern time. Any report not in "Submitted" status by that time will be marked as late in the EHBs. No extensions will be granted.

This timeline can be viewed and downloaded at any time on the TargetHIV website.

Upcoming RSR Webinars

Date	Webinar
November 29, 2023	RSR TRAX
December 6, 2023	Moving Beyond Data Completeness: Ensuring RSR Clinical Data Reflect Services Being Provided

Here are some of the upcoming webinars that will be useful in completing the RSR.

On November 29th, you can join in for an introduction to TRAX, a helpful tool used for creating the RSR client-level XML data file.

On December 6th is a summary of the 2022 RSR data.

The links for these webinars will take you directly to the registration pages for them, so if you still need to register you can do so from here or on the TargetHIV website

The rest of the RSR Webinar Series should be up soon on the TargetHIV website as well.

TA Contact Information

TA Resource	Type of TA
Ryan White Data Support 888-640-9356 RyanWhiteDataSupport@wrma.com	<ul style="list-style-type: none"> • RSR-related content and submission questions • Interpretation of the RSR Instruction Manual and HAB's reporting requirements • Instructions for completing the RSR Recipient and Provider Reports • Data validation questions
The Data Integration, Systems, & Quality (DISQ) Team Data.TA@caiglobal.org Sign up for the DISQ listserv Submit a DISQ TA Request	<ul style="list-style-type: none"> • Data reporting requirements • Extracting data from systems and reporting it using the required XML schema • TRAX and the encrypted Unique Client Identifier (eUCI) Application • Data quality issues
Electronic Handbooks (EHBs) Customer Support Center 877-464-4772 Submit an EHBs TA Request	<ul style="list-style-type: none"> • RSR software-related questions; • EHBs navigation • EHBs registration, access, and permissions
CAREWare Help Desk 877-294-3571 cwhelp@jprogm.com Join the CAREWare listserv	<ul style="list-style-type: none"> • How to generate the XML file from CAREWare correctly • How to view a sample client summary file • Creating custom reports
Login.gov Help Center 844-875-6446 Submit a help ticket	<ul style="list-style-type: none"> • Login.gov account registration and management

To finish up, let's review some technical assistance resources available to assist you during the RSR Submission.

The Ryan White Data Support team addresses RSR-related content, submission questions, interpretation of the RSR Instruction Manual and HAB's Reporting Requirements. They also assist with instructions for completing the RSR Recipient and Provider Reports, and data validation questions.

The DISQ Team addresses questions for those needing assistance in extracting data from their systems and reporting the data using the required XML schema; they also offer TA on the TRAX Application, data reporting requirements, and data quality issues.

The EHBs Customer Support Center provides assistance with the EHBs, including RSR software-related questions, EHBs navigation, registration, access and permissions.

For our CAREWare users, the CAREWare Help Desk will be your best resource. The CAREWare help desk can assist you with generating XML files from CAREWare and also help create custom reports. I would encourage all CAREWare users to sign up for

the listserv.

Finally, we also have the Login.gov Help Center. If you need any help setting up or managing your Login.gov account to be able to access the EHBs and the RSR you can always give them a call.

If you are unsure of who to call, feel free to contact any one of the resources provided and they will be able to direct you to the appropriate place.

Additional TA Resources



[TargetHIV Website](#)

- [2023 RSR Instruction Manual](#)
- [RSR Data Dictionary and XML Schema Implementation Guide](#)
- [DISQ ListServ](#)



[HRSA HAB Website](#)

- Policy notices, instructions, and HAB information
- [PCN #16-02](#)

The TargetHIV website is the best place to find all of our TA materials such as the 2023 RSR Instruction Manual and the RSR data dictionary. You can also join the DISQ listserv to be informed about all things RSR. And then the HRSA HAB website is the place to go for policy notices and HAB information. PCN #16-02 can be found on that website which is the list of definitions for all core medical and support services.



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www.HRSA.gov

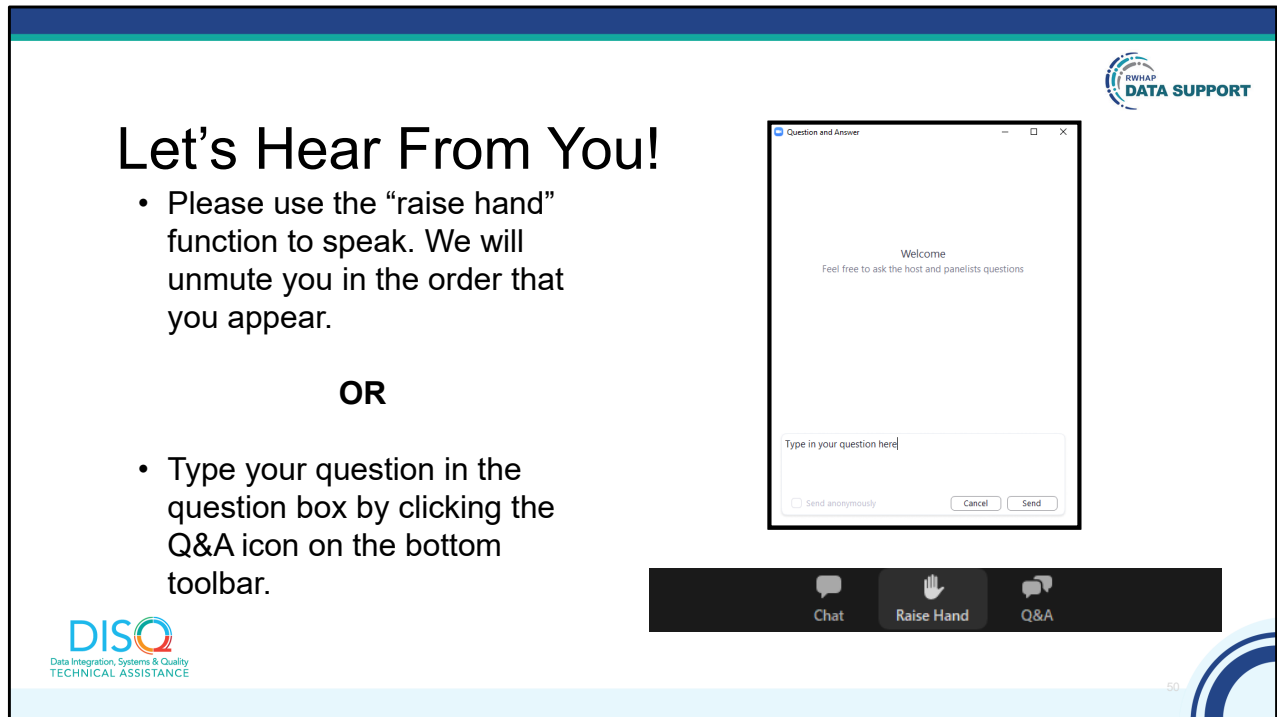


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Finally, to connect with and find out more about HRSA, check out HRSA.gov.

I'd like to take a moment thank everyone for joining us on today's presentation and I will now turn it back over to Hunter for the Q&A portion of the webinar.



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.

DISQ
Data Integration, Systems & Quality
TECHNICAL ASSISTANCE

RWHAP DATA SUPPORT

Question and Answer

Welcome
Feel free to ask the host and panelists questions

Type in your question here

Send anonymously

Cancel Send

Chat Raise Hand Q&A

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.