

RSR

Ryan White HIV/AIDS Program Services Reporting System

Part I: Completing the Grantee Report

1

DF

Welcome to this Web cast: Completing the Grantee Report. Thank you so much for joining us today!

My name is Diane Fraser. I am a member of the SPHERE/Abt Team, one of several groups engaged by HAB to provide training and technical assistance to Ryan White grantees during the implementation of the RSR. I will introduce our speakers and facilitate the question and answer period at the end of the presentation. At any time during the presentation, you will be able to send us questions using the "Chat" function. You will also be able to call in to ask questions directly ("live") at the end of the presentation.

Today's Webcast is presented by Stefani Olsen of the SAIC team and Maria Jackson Hittle of the WRMA/CSR team. It is designed to provide you with a review of the Grantee Report and a "guided tour" of the RSR System. We hope that by giving you this opportunity, you will be comfortable when it comes time to complete your Grantee Report.

After the presentation we will take questions from both the "chat" function and over the phone. We hope that all of you will use this opportunity to ask any questions that you have about completing your Grantee Report.

Future Webcasts

- **RSR System**
Part II: Completing the Provider Report
Tuesday, July 7, 2009
1:00 - 2:00 pm ET
- **RSR System**
Part III: Managing the RSR Deliverable
Tuesday, July 14, 2009
1:00 - 2:00 pm ET

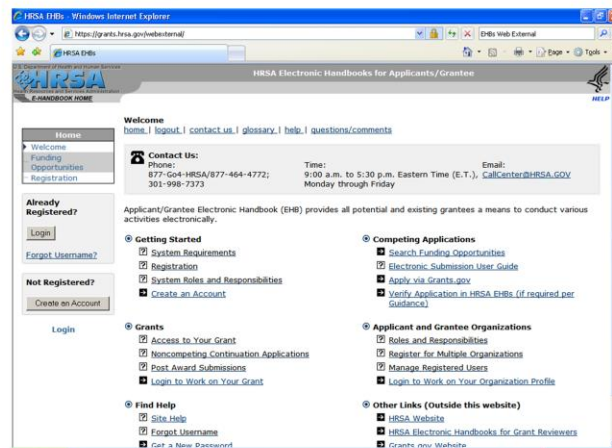
DF

Again, today's webcast will provide you with the information you need to know in order to successfully complete your Grantee Report.

Future webcasts will address the topics of: Completing the Provider Report on Tuesday, July 7, 2009 at 1:00 pm ET; and, Managing the RSR Deliverable on Tuesday, July 14, 2009 at 1:00 pm ET. If you find yourself with questions that are specific to one of these two topics, please be sure to attend the upcoming sessions.

Stefani will now get us started with an explanation on how to access your Grantee Reports.

Accessing the Grantee Report



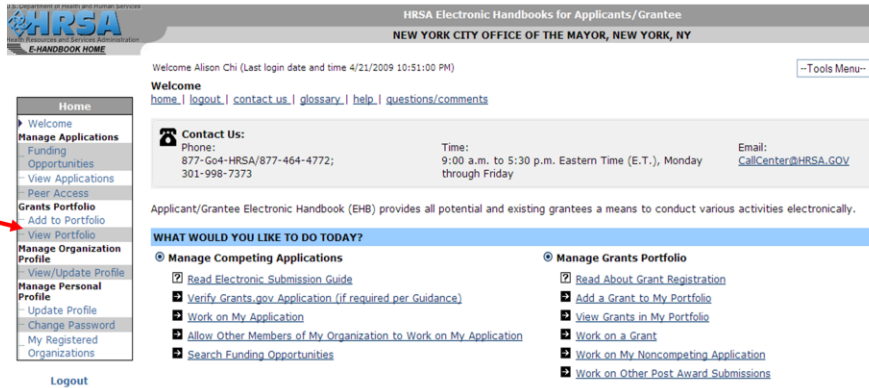
<https://grants.hrsa.gov/webExternal/Login.asp>

SO

ALL Grantees, including grantees that provide services (grantee/providers), access the RSR System via the HRSA Electronic Handbooks (EHBs) at the URL shown: <https://grants.hrsa.gov/webExternal/Login.asp>.

This is the same as what you did for RDR.

Accessing the Grantee Report



The screenshot shows the HRSA Electronic Handbooks for Applicants/Grantee website. The header includes the HRSA logo and the text "HRSA Electronic Handbooks for Applicants/Grantee" and "NEW YORK CITY OFFICE OF THE MAYOR, NEW YORK, NY". A welcome message for Alison Chi is displayed. The left navigation menu is expanded, showing options like "Home", "Welcome", "Manage Applications", "Funding Opportunities", "View Applications", "Peer Access", "Grants Portfolio", "Add to Portfolio", "View Portfolio", "Manage Organization Profile", "View/Update Profile", "Manage Personal Profile", "Update Profile", "Change Password", "My Registered Organizations", and "Logout". A red arrow points to the "View Portfolio" link. The main content area includes a "Contact Us" section, a "WHAT WOULD YOU LIKE TO DO TODAY?" section with links like "Manage Competing Applications", "Manage Grants Portfolio", "Manage My Profile", and "Manage Organization Profile", and a "Tools Menu" link.

View Grant Portfolio

SO

Select "View Portfolio" from the left navigation menu

Accessing the Grantee Report

HRSA Electronic Handbooks for Applicants/Grantee
STATE OF RHODE ISLAND DEPARTMENT OF HEALTH, PROVIDENCE, RI

Welcome Marie Masso (Last login date and time 6/17/2009 1:56:00 PM)

View Portfolio
[home](#) | [logout](#) | [contact us](#) | [glossary](#) | [help](#) | [questions/comments](#)

Following are the grants for which you have been registered either as a project director or an employee. Click on the "Open Grant Handbook" link to manage a grant.

GRANTS LIST			
X07HA00011:Ryan White Part B HIV Care Grant Program			Last Award Issued on: 03/31/2008
Project Period	4/1/1991-3/31/2009	Budget Period	4/1/2008-3/31/2009
CRS EIN	1056000522A5	Number of Support Years	18
Project Director	Paul Loberti, email relester1@hotmail.com , phone (401) 222-2320 Ext: 7545		
Grant Contact	Djuana Gibson, email relester1@hotmail.com , phone (301) 443-3243		
Program Contact	Karen Mercer, email relester1@hotmail.com , phone (301) 443-0702		

[Open Grant Handbook](#)

[Acceptable Use Policy](#)

Logout

Open Grant Handbook

SO

Find the Ryan White grant program in your Grants list, and click on "Open Grant Handbook"

Please Note: If you are not the Project Director, your Ryan White Grant will not show up unless the project director has granted you access. So if you don't see it ask your Project Director to give you access.

Accessing the Grantee Report

The screenshot shows the HRSA Electronic Handbook interface. On the left is a 'Grant Menu' with sections: 'View Awards' (Overview, Last NGA, Award History), 'Administer' (New/Existing Users, Monitor Schedules, Noncompeting Continuations, Performance Reports, Progress Reports, Other Submissions), and 'Return Home' (View Portfolio, Home). A red arrow points to 'Performance Reports' under the 'Administer' section. The main content area includes a welcome message for Marie Masso, contact information, and a 'WHAT WOULD YOU LIKE TO DO TODAY?' section with links for viewing grant information, administering the grant handbook, and managing post-award submissions.

Go to Performance Reports

SO

On your Grant Menu (left navigation Menu), under Submissions, select “Performance Reports”

NOTE: If your project director has not granted you privileges to view or edit performance reports, you will not see the “Performance Reports” link. If you do not see this link, ask your project director to give you privileges to view/edit and/or submit performance reports.

If you run into problems with access permissions, contact HCC.

Accessing the Grantee Report

PERFORMANCE REPORT			
Input Parameters: (Show Parameters)			
RDR Annual Submission		Schedule Status: Not Started	
Type	Performance Reports	Due Date	4/1/2009 6:00:00 PM <i>Late by: 77 days</i>
Available Date	12/8/2008 9:00:00 AM	Submission Tracking Number	N/A
Reporting Cycle	Calendar Year	Reporting Period	01/01/2008 - 12/31/2008
Online Submission	Yes (Preferred)	Submission Status	Not Started
Started by			
Start Report			
RSR Interim Performance Report		Schedule Status: In Progress	
Type	Performance Reports	Due Date	9/15/2009 6:00:00 PM Due In: 90 days
Available Date	3/15/2009 11:27:43 AM	Submission Tracking Number	00000004
Reporting Cycle	Semi Annually	Reporting Period	03/15/2009 - 03/15/2010
Online Submission	Yes (Required)	Submission Status	0 of 4 Reports complete; 4 of 4 started.
Started by	Marie Masso on 4/22/2009 10:46:30 AM		
Submit Report Edit Report View Report			

Start (or Edit) your Report

SO

In your list of Performance Reports, find the “RSR Interim Performance Report,” and click on “Start Report” if this is your first time accessing the report, or “Edit Report” if you are going to work on a report that has already been started

Maria will walk you through completing the grantee report.

Completing Questions 1 – 4 of the Grantee Report

Grantee Report

Report Status: working

You must certify the Grantee Report before performing any other actions. All restricted actions will result in redirection back to the Grantee Report.

Grantee Information Providers Funded by Your Grant Providers Funded through Your Fiscal Intermediaries

Grantee Name: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH
Funding Source: R01HAN0011
Reporting Period: 1 January 2009 through 30 June 2009

Please review items 1 through 3 and correct any changes in the Electronic Handbooks (EHBs).

1. Grantee of record address:
a. Street: 3 CAPITOL HILL
b. City: PROVIDENCE
c. State: RI
d. ZIP Code: 02900-5097

2. DUNS Number: 14-531-0553

3. Contact information of person completing this form:
a. Name: Mario Masso
b. Title: Empress
c. Phone: (401) 222-7548
d. Fax: (401) 222-2488
e. Email: reilester1@hotmail.com

4. Please select the status of your agency's clinical quality management program for assessing HIV health services. (Select only one.)
☒ Clinical quality management program introduced this reporting period
☐ Previously established quality management program
☐ Previously established program with new quality standards added this reporting period
☐ Not applicable

Next Page > Save Restore Initial Values

MJH

One reminder before we begin, you must complete one Grantee Report for each of your Ryan White grants. For example, if your agency receives a Part A grant, a Part A MAI grant, and a Part C grant, you will complete three grantee reports.

When you enter RSR as a Grantee, the first thing you will notice is that Items 1, 2, and 3 on the Grantee Report are read only. These items are “pulled from” the EHBs and displayed here in RSR. So, if you notice some of the data reported are incorrect, or missing, you must edit/enter them in the EHB. You cannot edit/enter them here in RSR.

Updating the Grantee's Organization Information (Q. 1 - 2)

The screenshot displays the EHB system interface. On the left is a navigation menu with the following items: Home, Welcome, Manage Applications (Funding Opportunities, View Applications, Peer Access), Grants Portfolio (Add to Portfolio, View Portfolio), Manage Organization Profile (View/Update Profile, highlighted with a red arrow), Manage Personal Profile (Update Profile, Change Password, My Registered Organizations), and Logout. The main content area shows the 'View/Update Profile' page for Marie Mazzo. It includes a welcome message, login details, and links. Below this is the 'ORGANIZATION PROFILE' section with two tables: 'Organizational Information' and 'Physical Location Address'.

Organizational Information	
Organization Name	STATE OF RHODE ISLAND DEPARTMENT OF HEALTH
Organization Website	
Organization Type	Intermunicipal
EIN/TIN	05-6000522
DUNS Number Help	145310553
CRS EIN Number	1056000522A5

Physical Location Address
3 CAPITOL HILL RM 402 PROVIDENCE RI 02908-5097

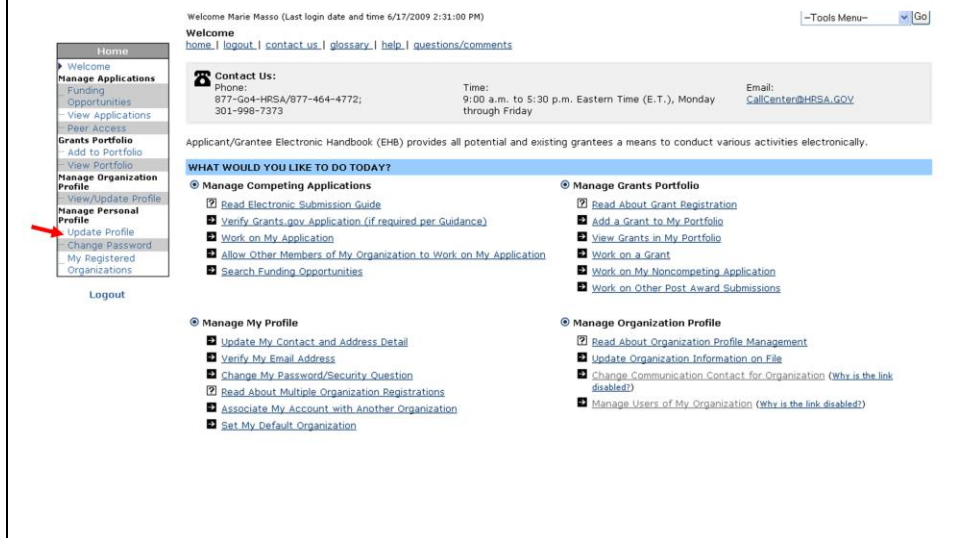
Mailing Address
3 CAPITOL HILL RM 408 PROVIDENCE RI 02908-5097

MJH

To update Question #1, “Grantee of Record Address” and/or Question 2 “DUNS Number”, log out of the RSRs and return to your EHB home page. Find the heading “Manage Organization Profile” on your left Navigation Menu and select the option “View/Update Profile.”

Only the organization’s Authorizing Official can enter or update the Grantee of Record Address or the DUNS number in the EHB. If you are not this person; if this person has left the organization; or if you do not know who this person is, contact the HRSA Call Center for assistance.

Updating the Contact Information of Person Completing the Report (Q. 3)



MJH

To enter or update Question 3, the Contact Information for Person Completing this form, log out of the RSRs and return to your EHB home page. Click on the “Update Profile” link under the “Manage my Personal Profile” heading on the left navigation menu.

After updating your contact information, return to your grant portfolio and open your grant handbook. Find the grant you were previously working on and go back into the RSR System by selecting “edit report.”

Important Note:
**You must logout of the RSR
System before editing your contact
information in the EHBs!**

MJH

Again, you must log out of the RSRS before editing your information in the EHBs for the changes to take affect.

Before I continue with the walk-through of the Grantee Report, I would like to invite Stefani to point out some of the features of the RSR System that will be important to you as you complete the Grantee Report.

RSR System Features: Task List

Inbox

Progress Report	Favorite Reports	Task List	Grantee List	Grantee Report	Provider Report	Print Request	Un-Submit Request	Change Request	Provider List	Validation Request
View Task List details [Help]										
Task Name				Action			Status			
Verify Grantee Information				Go Perform Task			Completed?		Yes <input checked="" type="radio"/> No <input type="radio"/>	
Certify Grantee Report				Go Perform Task			Completed?		Yes <input checked="" type="radio"/> No <input type="radio"/>	
Oversee Data Entry				Go Perform Task			Completed?		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Review and Accept Provider Reports				Go Perform Task			Completed?		Yes <input type="radio"/> No <input checked="" type="radio"/>	
<div>Update Task Status</div> <div>Reset</div>										

The “Task List” tab in your Inbox shows all the tasks you have to do in RSR and the status of each.

SO

The Task List contains a list of activities that can be used to monitor your progress throughout the reporting lifecycle. The top list identifies the actions that you should perform as a grantee and the bottom list depicts those tasks that should be performed as a provider. The tasks displayed depends on the type of user: a grantee; a provider; or both.

Task List: The “Task List” tab in your Inbox shows all the tasks you have to do in RSR and the status of each.

Please note: The “Status” indicator (“Yes”/“No”) is not automatically updated by the system. This is a tool that is optional, and allows you to check off as completed activities as you complete them. Because you must click on “Yes” to update the status, even if you have completed an item – such as certifying your grantee report – the status here will say “No” for completed until and unless you click “Yes” This option is a great way to keep track of your work progress

Rows 1 and 2 pertain to your Grantee Report.

When you have completed the “Verify Grantee Information” step, click “Yes” in your Task Status list so that you will know you completed this activity, then click on “Update Task Status”

When you have certified your Grantee Report, click on the “Yes” in your Task Status list for this item so that you will know you have certified your report, then click on “Update Task Status.”

RSR System Features:

Provider List

Inbox

Progress Report	Favorite Reports	Task List	Grantee List	Grantee Report	Provider Report	Print Request	Un-Submit Request	Change Request	Provider List	Validation Request
[Download in Excel Format]										
Page 1 of 1 (Total 5 Records)										
Items per page:										15
Edit	Grant #	Fund Source	Provider Name*							Registration Code
edit	X07HA00011	Part B	AIDS Project Rhode Island							42596
edit	X07HA00011	Part B	FACTS - AIDS Care Ocean State, Inc.							54525
edit	X07HA00011	Part B	Family Resources (Agape Center)							2913
edit	X07HA00011	Part B	Family Service Agency of R.I., Inc.							17373
edit	X07HA00011	Part B	The Miriam Hospital							20178
1										


See a list of all your providers
from the Provider List tab.

SO

You can see a list of all your providers on the “Provider List” tab.

Editing Provider Address Information and EIN

Inbox

Progress Report	Favorite Reports	Task List	Grantee List	Grantee Report	Provider Report	Print Request	Un-Submit Request	Change Request	Provider List	Validation Request
[Download in Excel Format]										
Page 1 of 1 (Total 5 Records)										Items per page: 15
Edit	Grant #	Fund Source	Provider Name*					Registration Code		
 edit	X07HA00011	Part B	AIDS Project Rhode Island					42695		
edit	X07HA00011	Part B	FACTS - AIDS Care Ocean State, Inc.					64525		
edit	X07HA00011	Part B	Family Resources (Agape Center)					2913		
edit	X07HA00011	Part B	Family Service Agency of RI, Inc.					17373		
edit	X07HA00011	Part B	The Miriam Hospital					20178		

SO

To edit information associated with your providers, such as addresses and EIN: Click on the “Edit” link next to the provider whose information you want to edit.

Editing Provider Address Information and EIN

Edit Provider

Provider Name: AIDS Project Rhode Island
Brief Description: AIDS Project Rhode Island
EIN: 050417446
Org ID: 2696
Registration Code: 42696

Last Modified: 6/15/2009 2:44:22 PM
Last Modified By: bluebird

[Manage Addresses](#) [Save](#) [Restore Initial Values](#)

[Back to previous screen](#)

[Close Window](#)

SO

The Edit Provider window will appear where you can enter/update the EIN. Be sure to click the “Save” button after making your changes.

To edit address information for the provider, click on “Manage Addresses.”

Editing Provider Address Information and EIN

Back to Edit Screen | [Add a new Address](#)

Address	Edit	Remove
232 West Exchange Street, Providence, RI 02903 Close Window	Edit Address	Remove Address

Edit Address for AIDS Project Rhode Island

Street Address:

City:

State:

Zip Code:

Last Modified: 6/15/2009 3:17:30 PM

Last Modified By: bluebird

[Close Window](#)

S0

The Manage Addresses window will appear. From this window, you can “Edit Addresses”, “Add Addresses”, and “Remove Addresses” for the provider.

Important Notice:
**Grantee/Providers must update
their user information in both the
EHBs and RSR System.**



SO

Grantee/Providers must update their user information, if needed, in both systems.

Should this information match? Not necessarily. Some Grantee/Providers intentionally list a different organizational address for their Provider report than for their Grantee report. For example, the address listed on the Grantee report might be the official address where contracting and grants are handled, whereas the provider address might be associated with a service delivery location. “Contact information for the person completing this form”, however, should match.

RSR System Feature: Grantee Report

Inbox

Progress Report	Favorite Reports	Task List	Grantee List	Grantee Report	Provider Report	Print Request	Un-Submit Request	Change Request	Provider List	Validation Request
										Status: All
Page 1 of 1 (Total 1 Records)										Items per page: 15
ID	Grant Number	Grantee Name*				Status	Fund Source		Action	Print
1444	X07HA00011	STATE OF RHODE ISLAND DEPARTMENT OF HEALTH				submitted	Part B		 Open	
1										

The easiest method by which you can locate your
Grantee Report in the RSR system.

SO

To quickly access your Grantee Report, click on the Grantee Report tab and then clicking on the “Open” icon in the “Action” column.

Please note that this feature was deployed this morning (June 29, 2009), so you should see it now!

You can also download a PDF version of your Grantee Report from this screen. The PDF can be printed and/or saved on your local system.

RSR System Feature: Search Grantee Reports

The screenshot shows the RSR System interface for searching grantee reports. On the left, the 'E-HANDBOOK' sidebar displays the 'Grant Number' as X07HAD0011 and a list of navigation links. The 'Search' link is highlighted. The main area on the right is titled 'Report Search / Grantee Reports' and contains search criteria fields: 'HIV/AIDS Program Part' (dropdown), 'Last Modified Date Range Starts' and 'Last Modified Date Range Ends' (date pickers), 'Report Period' (dropdown), and 'Status:[Help]' (dropdown). 'Search' and 'Clear' buttons are at the bottom.

This is an alternate method for locating your
Grantee Report in the Web System.

SO

Another way to access your Grantee Report is by using the Search Grantee Reports feature.

- Click on “Grantee Report” in the Search section of your left navigation bar.
- Enter search criteria in the Grantee Report Search screen.

Note: You can only “find” Grantee Reports associated with your organization

Now I will turn you back over to Maria who will discuss setting up your contracts list and adding providers.

Completing Questions 1 – 4 of the Grantee Report

Grantee Report

Report Status: working

You must certify the Grantee Report before performing any other actions. All restricted actions will result in redirection back to the Grantee Report.

Grantee Information | Providers Funded by Your Grant | Providers Funded through Your Fiscal Intermediaries

Grantee Name: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH
Funding Source: 101HAN0011
Reporting Period: 1 January 2009 through 30 June 2009

Please review items 1 through 3 and correct any changes in the Electronic Handbooks (EHBs).

1. Grantee of record address:
a. Street: 3 CAPITOL HILL
b. City: PROVIDENCE
c. State: RI
d. ZIP Code: 02909-5097

2. DUNS Number: 14-531-0553

3. Contact information of person completing this form:
a. Name: Mario Masso
b. Title: Empress
c. Phone: (401) 222-7548
d. Fax: (401) 222-2488
e. Email: reilester1@hotmail.com

4. Please select the status of your agency's clinical quality management program for assessing HIV health services. (Select only one.)
☒ Clinical quality management program introduced this reporting period
☐ Previously established quality management program
☐ Previously established program with new quality standards added this reporting period
☐ Not applicable

Next Page > | Save | Restore Initial Values

MJH

Thanks Stefani. Now that Stefani's shown you the system features you are going to need complete your Grantee Report, we're ready to continue with data entry. So, let's begin again where we left off.

After you've updated your contact information in the EHBs, go back into your Grantee Report and confirm that the edits you made in the EHBs are now in your Grantee Report.

Next, if you haven't already done so, please select a response to Item 4 to indicate the status of your agency's clinical quality management program. Item 4, is a required item and you must select an answer. Be sure to save your information before going on to the next page. You're ready to set up your contract lists.

Setting Up the Contract List for First Level Providers

Grantee Report
Report Status: certified

Grantee Information **Providers Funded by Your Grant** Providers Funded through Your Fiscal Intermediaries

Grantee Name: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH Reporting Period: 1 January 2009 through 30 June 2009
Funding Source: 2570400011

Review the list of your agency's service provider contracts. This list is pre-populated with information from the current Ryan White Data Report system. It should include all provider contracts that were active at any time during the 1 January 2009 through 30 June 2009 reporting period. Please add, edit, and remove provider contracts as appropriate.

3 Contracts View Page Validations

Provider	Contract Reference	Start Date	End Date	Amount	Services	Completed
ADIS Project Rhode Island 235 West Exchange Street, Providence RI 02903		1/1/2009	6/30/2009	\$250	Services	<input checked="" type="checkbox"/>
House of Compassion 2533 Herndon Road, Cumberland RI 02864		1/1/2009	6/30/2009	\$2,000	Services	<input checked="" type="checkbox"/>
MRI Community Services 23 Peace Street, Providence RI 02907		1/1/2009	6/30/2009	\$0	Services	<input type="checkbox"/>
				\$2,250		

[ADD PROVIDER CONTRACT](#)

< Previous Page Next Page > Save

MJH

FIRST, make sure your provider list is complete and correct. For this first submission, you will be presented with a list of your providers as last saved in RDR. We pre-populated the contract list to give grantees, especially those with a large number of providers, a jump on completing the report. You will have to edit list. Please note that, in the future, your contract list will be pre-populated based on your last RSR submission.

All first level providers that received Ryan White funding directly from a grantee to provide services during the reporting period and who are not being given an exemption should be included on the contract list on “Providers Funded by Your Grant” tab.

If one of the providers listed did not receive funding during the reporting period, you can delete the provider contract by clicking on the trashcan icon. If a provider that received funding during the reporting period is missing, you can add provider contracts to your list by clicking on the “Add Provider Contract” link on the bottom left corner of the window.

Searching for Providers

Manage Provider Information

Org ID:

Registration Code:

Grant Number:

HAB Grantee Number:

Provider Name/Description:

Grantee Name/Description:

HIV/AIDS Program Part:

State:

-- Select --

RI

☐ Limit search to providers under this grantee organization.

Search

Clear

Cancel

MJH

When you click on “Add Provider Contract”, the Provider Search window will appear. Enter search criteria for your provider in any of the available fields and click the “Search” button.

Searching for Providers

Administration - Manage Provider Search Results						
Search Criteria: Name: Hospital						
If you do not find the Provider in the list below, please contact Ryan White Program Data Support at 1-888-640-9356 to have the new organization added to the RDR Web System. Please be sure you have searched thoroughly for the Provider before having a new one added.						
Provider	Org ID	EIN	Contact	City/State		
Adolescent Initiative - University Hospital of Downstate Medical Center (Edit Provider) (Add Provider)	7732	141368361	Ellen Honey		Provider Report	Grantee List
AIDS Services Center at St Luke's Hospital (Edit Provider) (Add Provider)	2621	232564310	KAREN SMOYER	BETHLEHEM, PA	Provider Report	Grantee List
Alfred I. duPont Hospital for Children (Edit Provider) (Add Provider)	2083	590634433	Elizabeth Wood	Wilmington, DE	Provider Report	Grantee List
ALL Children's Hospital (Edit Provider) (Add Provider)	7940	0	Patricia Emmanuel	St. Petersburg, FL	Provider Report	Grantee List
Allina - Abbott Northwestern Hospital - Park House (Edit Provider) (Add Provider)	1858	363261413	Barbara A. Anderson	Minneapolis, MN	Provider Report	Grantee List
Allina - Abbott Northwestern Hospital Infectious Disease Clinic (Edit Provider) (Add Provider)	1857	363261413	Becky Ness & Kevin Sitter	Minneapolis, MN	Provider Report	Grantee List

MJH

The system will then generate a list of providers that match the criteria you entered in the search field. Be sure to select the "Add Provider" link to add the provider to your contract list.

Searching for Providers

Administration - Manage Provider Search Results

Search Criteria:
Name: Test

If you do not find the Provider in the list below, please contact Ryan White Program Data Support at 1-888-640-9356 to have the new organization added to the RDR Web System. Please be sure you have searched thoroughly for the Provider before having a new one added.

No Record Found

Provider	Org ID	EIN	Contact	City/State
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- If your search is unsuccessful try:
 - Simplifying your search criteria
 - Leaving the “State” criteria blank
 - Contacting Data Support for assistance

MJH

Once again, the system will return only providers whose information matches the criteria you entered. So, if your provider search results in “No Records Found”, go back to the Search Criteria page and make sure your search criteria are not causing your desired provider to be excluded from the results.

For example:

If you entered part of the Provider Name, it may not match the listing in the system. Try removing this criteria altogether or using a key word from the provider’s name.

You can try leaving the State blank (“Select”). Some providers do not have a complete addresses in the system. If the provider you are trying to find does not yet have a value in the “State” field of their address, it will be excluded from the results if you select a value for the “State” field.

If you’re still not able to locate your provider, contact Data Support for assistance. Also contact Data Support if your provider is a new Ryan White agency. They will need to be added to the provider directory before you can add them to your contract list.

Setting Up the Contract List for First Level Providers

Grantee Report

Report Status: certified

Grantee Information: **Providers Funded by Your Grant** Providers Funded through Your Fiscal Intermediaries

Grantee Name: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH Reporting Period: 1 January 2009 through 30 June 2009

Funding Source: 9516460011

Review the list of your agency's service provider contracts. This list is pre-populated with information from the current Ryan White Data Report system. It should include all provider contracts that were active at any time during the 1 January 2009 through 30 June 2009 reporting period. Please add, edit, and remove provider contracts as appropriate.

3 Contracts

Provider	Contract Reference	Start Date	End Date	Amount	Services	Completed
ADCS Project Rhode Island 232 West Exchange Street, Providence RI 02903		1/1/2009	6/30/2009	\$250	Services	<input checked="" type="checkbox"/>
House of Compassion 2510 Mendon Road, Cumberland RI 02864		1/1/2009	6/30/2009	\$2,000	Services	<input checked="" type="checkbox"/>
NRI Community Services 23 Peace Street, Providence RI 02902		1/1/2009	6/30/2009	\$0	Services	<input type="checkbox"/>
				\$2,250		

ADD PROVIDER CONTRACT

< Previous Page Next Page > Save

MJH

Next update the contract reference, dates, and amounts. You can edit any of the pre-populated data by simply placing your cursor in the field.

Contract Reference is an optional field. Completing the Contract Reference may be very useful for tracking and differentiating contracts, particularly if you have more than one contract with the same provider. For example, if your fiscal year goes from April 1 to March 30, you will have two contracts on your list for this provider. One with contract dates April 1 2008 to March 30 2009 and another from April 1 2009 to March 30 2010. You may wish to give the first contract the reference FY2008 (Fiscal Year 2008), and the second contract the reference, FY2009.

Revise the Start and End Dates so that they reflect the actual start and end dates of the contract. The contract period may begin before the start of the reporting period (January 1, 2009), and/or extend beyond the end of the reporting period (June 30, 2009). You do not have to use the pre-populated dates. The only requirement for the contract dates is that at least one day of the contract must fall within the reporting period.

The contracts initially show up on the list with "\$0" entered for the contract amount. Please report the total amount of funding allocated for the selected contract. You do not have to prorate the contract amount to the reporting period, just report whatever amount was budgeted or allocated to this provider for the contract dates entered. The contract amount is required and the contract must have a value of at least \$1.

Setting Up the Contract List for First Level Providers

Grantee Report

Report Status: **certified**

Grantee Information **Providers Funded by Your Grant** Providers Funded through Your Fiscal Intermediaries

Grantee Name: **STATE OF RHODE ISLAND DEPARTMENT OF HEALTH** Reporting Period: **1 January 2009 through 30 June 2009**

Funding Source: **202HAW011**

Review the list of your agency's service provider contracts. This list is pre-populated with information from the current Ryan White Data Report system. It should include all provider contracts that were active at any time during the **1 January 2009 through 30 June 2009** reporting period. Please add, edit, and remove provider contracts as appropriate. [View Page Validation](#)

Provider	Contract Reference	Start Date	End Date	Amount	Services	Completed
ADIS Project Rhode Island 235 West Exchange Street, Providence RI 02903		1/1/2009	6/30/2009	\$250	Services	<input checked="" type="checkbox"/>
House of Compassion 2510 Mendon Road, Cumberland RI 02944		1/1/2009	6/30/2009	\$2,000	Services	<input checked="" type="checkbox"/>
NRI Community Services 21 Peace Street, Providence RI 02907		1/1/2009	6/30/2009	\$0	Services	<input type="checkbox"/>
				\$2,250		

[ADD PROVIDER CONTRACT](#)

[Previous Page](#) [Next Page >](#) [Save](#)

MJH

THIRD indicate the services that are funded for each contract. Click on the “Services” link to access the service selection window.

Setting Up the Contract List Indicating Funded Services

Grantee: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH
Provider: AIDS Project Rhode Island

Funding Source: Part B
Grant #: X07HA00011

Administrative & Technical Services **Core Medical Services** Support Services HIV Counseling & Testing

Select the services this agency was funded to provide under this agreement. (Check all that apply.)

Funded	Service
<input checked="" type="checkbox"/>	Outpatient/ambulatory medical care
<input type="checkbox"/>	Local AIDS Pharmaceutical Assistance
<input type="checkbox"/>	Oral health care
<input checked="" type="checkbox"/>	Early intervention services (Parts A and B)
<input type="checkbox"/>	Health Insurance Premium & Cost Sharing Assistance
<input type="checkbox"/>	Home health care
<input type="checkbox"/>	Home and community-based health services
<input type="checkbox"/>	Hospice services
<input type="checkbox"/>	Mental health services
<input type="checkbox"/>	Medical nutrition therapy
<input type="checkbox"/>	Medical case management (including treatment adherence)
<input type="checkbox"/>	Substance abuse services-outpatient

< Previous Page Next Page > Save Restore Initial Values

[Close Window and Return to Contracts Page](#)

MJH

Select the services that are funded for each contract by clicking on the checkbox next to the service. The Services are divided into four tabs – one for each of the following categories:

Administrative and Technical Services

Core Medical Services

Support Services

HIV Counseling and Testing

If you have questions regarding any of the services listed, please consult the instruction manual.

Once you have made selections on one tab, click “next page” to navigate to the next list of services. When all funded services have been selected, click “Close Window and Return to Contracts Page”.

Completing the Grantee Report Keeping Track of your Work

Grantee Report
 Report Status: working
 You must certify the Grantee Report before performing any other actions. All restricted actions will result in redirection back to the Grantee Report.

Grantee Information Providers Funded by Your Grant Providers Funded through Your Fiscal Intermediaries
 Grantee Name: STATE OF RHODE ISLAND DEPARTMENT OF HEALTH Funding Source: 20716A0011 Reporting Period: 1 January 2009 through 30 June 2009

Review the list of your agency's service provider contracts. This list is pre-populated with information from the current Ryan White Data Report system. It should include all provider contracts that were active at any time during the 1 January 2009 through 30 June 2009 reporting period. Please add, edit, and remove provider contracts as appropriate.

3 Contracts View Page Validation

Provider	Contract Reference	Start Date	End Date	Amount	Services	Completed
<input type="checkbox"/> AIDS Project Rhode Island 232 West Exchange Street, Providence RI 02903		1/1/2009	6/30/2009	\$250	Services	<input checked="" type="checkbox"/>
<input type="checkbox"/> House of Campaign 2510 Mendon Road, Cumberland RI 02864		1/1/2009	6/30/2009	\$2,000	Services	<input checked="" type="checkbox"/>
<input type="checkbox"/> NRI Community Services 23 Peace Street, Providence RI 02907		1/1/2009	6/30/2009	\$0	Services	<input type="checkbox"/>
				\$2,250		

ADD PROVIDER CONTRACT

MJH

When you are done editing a contract, click the checkbox next to the contract to indicate that you've completed data entry.

NOTE: As with the "Task List" tab, the system will not automatically mark a contract as "completed" just because you have entered contract dates, a contract amount, and/or services. You must "check" the box to track your progress.

You don't have to use this feature unless you want to. But, you may find it helpful if you have a lot providers and/or decide to complete the Grantee Report over the course of a few days.

Please be sure to save your data frequently and always before going a new activity (which for our demonstration, is setting up the contract list for second level providers.)

Setting Up the Contract List for Second Level Providers

Grantee Report

Report Status: working

You must certify the Grantee Report before performing any other actions. All restricted actions will result in redirection back to the Grantee Report.

Grantee Information Providers Funded by Your Grant **Providers Funded through Your Fiscal Intermediaries**

Grantee Name: South Carolina Department of Health & Environmental Control Reporting Period: 1 January 2009 through 30 June 2009

Funding Source: X07HA00038

Review the list of contracts funded by your grant through your agency's fiscal intermediary service provider(s). This list is pre-populated with information from the current Ryan White Data Report system. It should include all provider contracts that were active at any time during the 1 January 2009 through 30 June 2009 reporting period. Please add, edit, and remove provider contracts as appropriate.

Fiscal Intermediary: South Carolina (I) complete

View Page Validations Page Size: 5

Page 1 of 1 (Total 2 Records)

Provider	Contract Reference	Start D	End Date	Amount	Services	Completed
CARETEAM 2505 Wesley Street, Suite 104, Myrtle Beach S...		1/1/2009	12/31/2...	\$15,000	Services	<input type="checkbox"/>
The Cooperative Ministry 1528 Taylor Street, Columbia SC 29201		1/1/2009	12/31/2...	\$23,000	Services	<input type="checkbox"/>
				\$38,000		

ADD PROVIDER CONTRACT

MJH

There are a special group of providers called Fiscal Intermediary Providers. These providers act as administrative agents for the grantee of record and pass Ryan White funding through to other agencies. Even though you may have given program funds to another agency to administer, ultimately, you are still held responsible for monitoring how your program funds are used. So, for agencies that use a fiscal intermediary, you must also report the providers that receive funding through your fiscal intermediary.

Providers funded through a fiscal intermediary are called second level providers (for more information about this, please see instruction manual). To add a provider to the "providers funded through a fiscal intermediary" contract list, first select the fiscal intermediary's name from the drop down box above the contract lists. Agencies will only appear in this box if you indicate that a first level provider is authorized to provide fiscal intermediary services.

Select the fiscal intermediary in the drop down box; then add or delete the providers managed by the selected fiscal intermediary.

You must add at least one contract under the fiscal intermediary.

In addition to the data rules previously discussed for first level providers, there are a few additional data checks that apply to contracts managed by a fiscal intermediary.

The contract dates for the 2nd level provider must fall entirely within the contract dates of the 1st level provider. If the fiscal intermediary has a nine month contract with you. The 2nd level provider cannot have a 12 month contract with the fiscal intermediary.

The value of the 2nd level providers' contracts may not exceed the total value of your contract with the 1st Level Provider. In other words, your fiscal intermediary cannot report that he funds an agency for \$100,000 if he only receives \$50,000 from you.

And, as with first level provider contracts, at least one service must be selected as "Funded" for each contract.

Things to Remember

- The contracts listed should approximate the actual agreements grantees have in place with providers
- You can include more than one contract with the same provider on your contract lists
- Grantees that also provide services must include a contract with themselves on their contract list
- Fiscal Intermediaries must have at least one sub-contract assigned to their organization

MJH

Once you've completed entering your contracts, be sure to check all of the contract data for accuracy. The contracts listed should approximate the actual agreements you have in place with your providers.

You can include more than one contact with the same provider on your contract lists. For example, when your fiscal year does not align with the reporting period, you may need to enter two contracts for each provider on your "Providers Funded by your Grant" tab.

Or, if you fund a provider directly AND the provider receives money through your fiscal intermediary, the provider should show up on both the "Providers Funded by your Grant" tab and the "Providers Funded through your Fiscal Intermediary" tab.

Grantees that also provide services must include at least one contract with themselves on their contract list.

Finally, fiscal intermediaries must be associated to at least one contract.

I've just told explained how the Grantee Report can be entered manually. For grantees with a large number of providers and/or contracts, however, there is another way which Stefani is going to share with you now.



RSR System Feature

Import Grantee Report w/Contracts

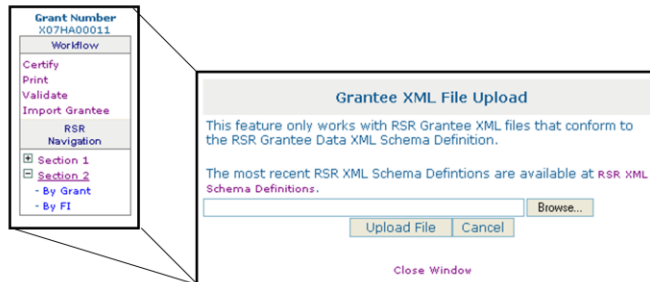
- Grantees can complete their Grantee Reports, including their contracts data, via XML file upload
- Ideal for Grantees that have a large number of providers and/or a large number of provider contracts
 - You must have some technical capability in-house to use this feature
 - You must use a special XML Schema format specifically designed for Grantee Report imports
 - This is not the same as the XML import for the Client Level Data Upload.
 - To get a copy of the Grantee Report XML schema format contact RSR Technical Lead Mike Dols at michael.j.dols@saic.com

SO

We know that some grantees, like New York, have over 100 providers and therefore, LOTS OF contracts to enter. So, we have developed a feature that allows grantees to do an XML import of their Grantee reports, including contract data. Most grantees probably do not need to, and would not want to, do this. However, those of you who do have large numbers of contracts and also have some technical know-how on staff may wish to consider it.

This requires the use of a different XML schema – not the same one as is used for Client Level Data – but one specifically developed for Grantee report imports. This schema is not online and can only be obtained by contacting SAIC Technical Lead, Mike Dols at michael.j.dols@saic.com

NEW! RSR System Feature Import Grantee Report w/Contracts



- Once you have created your grantee report XML file using the correct schema format, upload the file:
 - Click on the “Import Grantee” link on your left navigation menu
 - In the Grantee XML file upload window, click on the Browse button; locate and select the Grantee XML file
 - Click “Upload File.”

SO

Once you have created your grantee report XML file using the correct schema format, upload the file:

1. Click on the “Import Grantee” link on your left navigation menu
2. In the Grantee XML file upload window, click on the Browse button; locate and select the Grantee XML file
3. Click “Upload File



RSR System Feature

Import Grantee Report w/Contracts

- Note: If you are a Grantee that has Grants under multiple Parts, you will have multiple Grantee Reports to do (one for each Part)
- XML files uploaded into each Grantee Report you are required to complete should contain data only for that part.
 - This means that if you have grants under multiple parts, you will have multiple XML files. Be sure to upload the correct file to each report.

SO

Note: If you are a Grantee that has Grants under multiple Parts, you will have multiple Grantee Reports to do (one for each Part).

XML files uploaded into each Grantee Report you are required to complete should contain data only for that Part. (Each XML file is specific to each grantee report). This means that if you have grants under multiple parts, you will have multiple XML files. Be sure to upload the correct file to each report.

Validating your Grantee Report

Grant Number
X07HA00011

Workflow

- Certify
- Print
- Validate
- Import Grantee

RSR Navigation

- Section 1
- Section 2
- By Grant
- By FI

Grantee Information
There were no errors found in the "Grantee Information" section.

Providers Funded by Your Grant

Q#5 (Error)	NRI Community Services:
	• The Contract Amount is required and must be at least one dollar.

Providers Funded through Your Fiscal Intermediaries

Q#6 (Error)	House of Compassion
	• If you selected 'Fiscal Intermediary Support' as a service, You must specify at least one Fiscal Intermediary Contract

Close Window

SO

After completing data entry, validate your Grantee Report by clicking on the "Validate" link in the Left Navigation menu.

If there are errors in your report, the RSR System will present your results by section, which correspond to tabs in the system: The Grantee Information section; the Providers Funded by Your Grant section, and the Providers Funded through Your Fiscal Intermediaries section.

If a section has no errors, RSRS will show a message for that section saying that no errors were found.

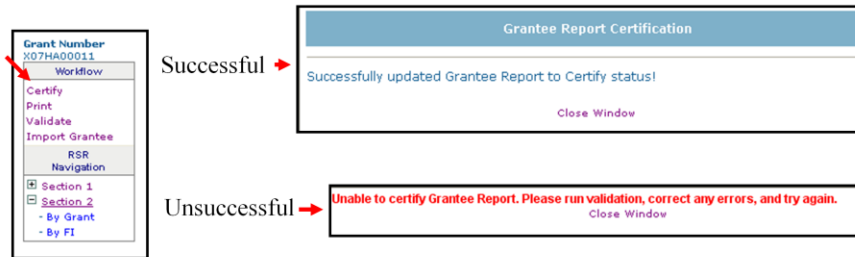
For sections in which errors were found, a table will appear. The first column will show the Question number that triggered the error. The second column will explain the error.

Example:

- In the validation report above, the contract with provider "NRI Community Services" has a value that is not >0. All contracts must have a value of \$1 or more.
- For the provider "House of Compassion," Fiscal Intermediary was listed as a service, but no contracts with 2nd Level Providers were entered.

You must resolve all errors in your report before it can be certified.

Certifying the Grantee Report



SO

To certify your Grantee Report, click on the “Certify” option on the Left Navigation bar

RSRS will check your report for errors. If there are no errors and your report is successfully certified, you will receive the “Successful” message as shown above.

If there are errors, your report will not be certified. The RSR System will issue a message saying “Unable to certify Grantee Report. Please run validation, correct any errors, and try again.”

IMPORTANT NOTE:

None of your Providers can submit their
reports until you have certified your
Grantee Report!

SO

IMPORTANT NOTE:

None of your Providers can submit their reports until you have certified your
Grantee Report!

Updating the Grantee Report After Certification

- There are two types of changes grantees can make to provider contract information after the Grantee Report is certified
 - Changes to contract details
 - Contract Start or End Dates
 - Contract Amounts, and
 - Funded Services
 - Adding or Deleting Contracts.

SO

What if you have “Certified” your Grantee Report, and then realize you need to make changes?

There are two types of changes grantees can make to provider contract information after the Grantee Report is certified, and different rules apply for each:

- Changes to contract details (Start or End Dates, Amounts, and Services Funded.) These changes can be made at any time by the Grantee without a Change Request. They may affect the status of associated Provider Reports as well as the status of other grantees funding the providers.
- Adding or Deleting Contracts. These types of changes can be made through July 15 without a change request. After July 15, these types of changes require a change request.

Updating the Grantee Report After Certification Changes to Contract Details

- When you change any of the contract details for a contract with a provider and re-certify:
 - If the provider report has been submitted (approved or not), its status will be re-set to working.
 - If any grantee reports associated with affected providers were in submitted status in EHBs, the EHB status of those grantees will be re-set to “Change Requested”

SO

When you change any of the contract details (Start or End Dates, Amounts, and Services Funded) for a contract with a provider and re-certify:

- If the Provider Report has been submitted (approved or not), its status will be re-set to working.
- If any RSR deliverables associated with affected providers were in “Submitted” status in EHBs, the EHB status of those deliverables will be re-set to “Change Requested”

Updating the Grantee Report After Certification Adding or Deleting Contracts

- Adding or Deleting Contracts through July 15
 - submission status of Provider Reports will not be affected
 - the submission status of grantee reports for other grantees associated with the provider will not be affected, nor will the status of the provider report
 - changes in the contracts list will be present the next time the provider accesses the their report


SO

Adding or Deleting Contracts Through July 15:

If you delete a contract with a provider at any time through 11:59pm July 15, no Change Request is Required.

- Because Providers cannot submit until July 16 or later, the submission status of Grantee Reports for other grantees associated with the provider will not be affected, nor will the status of the Provider Report.
- The next time the provider accesses their Provider Report, the contract you deleted will not appear or the contract added will appear.

Updating the Grantee Report After Certification Adding or Deleting Contracts

Inbox											
Progress Report	Favorite Reports	Task List	Grantee List	Grantee Report	Provider Report	Print Request	Un-Submit Request	Change Request	Provider List	Validation Request	
[Help]											
Page 1 of 1 (Total 1 Records)										Items per page: 15	
Request	Grantee Name	Provider Name	Fund Source	Change Type	Request Date/Time	Requested By	Request Status	Action Taken By	Action	Action Date	Comment
1	Rhode Island	The Miriam Hospital	Part B	Remove	6/21/2009 10:27:46 AM	mdols	Pending		Cancel Request		
1											

- Adding or Deleting Contracts after July 15
 - Changes trigger a “Change Request” that must be processed by Data Support
 - After approval, Provider Reports will be re-set to working status
 - May impact the status of other grantees’ reports in the EHB

SO

Adding or Deleting Contracts after July 15:

If you delete a contract with a provider at any time from 12:00am July 16 on, it triggers a “Change Request” that must be processed by Data Support. A popup window will ask you for a comment explaining the reason for the change. The change request will automatically be sent to Data Support. Until the change request is approved, the contract will still appear on your list.

If you add a contract with a provider at any time from 12:00am July 16 on, you will be able to enter all of the contract information; however, the contract will be flagged inactive until the change request is approved by data support.

You can track the status of your Change Request by selecting the “Change Request” tab in your Inbox. This interface also allows you to cancel the request.

If the change request is approved, and the provider is funded by other grantees:

- Any submitted Provider Reports will be re-set to “working” status, including those that have been approved by all other funding grantees.
- If you and all other funding grantees have already approved the provider report, and other grantees funding this provider have “submitted” reports in EHB, the EHB status of those other grantees’ reports is re-set to “Change Requested.”

This means that the provider will need to resubmit, and all its grantees will need to review and approve again.

Completing the Grantee Report Technical Assistance Resources

- Read the Instruction Manual
<http://www.hab.hrsa.gov/manage/cld.htm>
- Review this presentation on the TARGET Center Website
http://www.careacttarget.org/rsr_archive.asp
- Ryan White HIV/AIDS Program Data Support
 - 888.640.9356
 - Available 9 a.m. to 5:30 p.m. ET, Monday through Friday
 - ryanwhitedatasupport.wrma@csrincorporated.com
- HRSA Call Center
 - 877.Go4.HRSA (877.464.4772)
 - Available 9 a.m. to 5:30 p.m. ET, Monday through Friday
 - CallCenter@HRSA.gov

DF

If you have questions about completing the Grantee Report, information can be found in the instruction manual. We also encourage you to review this presentation when it is posted to the TARGET Center Web site.

Live assistance is also available at the two helpdesks listed.

Data Support can assist you with figuring out your reporting requirements, understanding service definitions, setting up your contract lists, and locating (or adding) a provider in the provider directory.

The HRSA Call Center can assist you with all EHBs issues, including resetting lost passwords, editing/setting up your “permissions”, and editing organization information in the EHBs. They will also help you with any technical issues you encounter in the RSRs (e.g. page load errors).

Future Webcasts

- **RSR System**
Part II: Completing the Provider Report
Tuesday, July 7, 2009
1:00 - 2:00 pm ET
- **RSR System**
Part III: Managing the RSR Deliverable
Tuesday, July 14, 2009
1:00 - 2:00 pm ET

DF

Future webcasts will address the topic of preparing the Provider Report and Managing the RSR Deliverable. The future webcast dates are:

RSR System

Part II: Completing the Provider Report

Tuesday, July 7, 2009

1:00 - 2:00 pm ET

RSR System

Part III: Managing your Submission

Tuesday, July 14, 2009

1:00 - 2:00 pm ET

Please be sure to attend the upcoming sessions.

Thank You

Questions?

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DF

We will now take your questions. I plan to alternate between questions sent through the chat function and those on the telephone. We will do our best to answer each question. If there is not an answer ready at hand for you, it will be researched and the answer will be posted it on the TARGET Center Website.

Your questions were great and I want to emphasize that anything we did not answer today will be researched and the answer will be posted on the TARGET Center Website. If you think of a question after this session ends, please feel free to send us a question through the help desk links we showed you on the TARGET website.

As we bring this webcast to a close, I would like to thank you all for your participation.

...And before we close, I'd like to ask each of you to respond to a few brief evaluation questions. If you look on the right-hand side of your screen, you will see that the "Polls" bar has been added.

You'll see three questions there. Please take a moment to answer these questions before leaving the session. Your input helps us to assure and improve the quality of future webcasts.