HRSA EHB USER GUIDE

Property Tracking Report User Guide for Grantees

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U.S. Department of Health and Human Services
HRSA
Health Resources and Services Administration

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1. Introduction

1.1. Document Purpose and Scope

The purpose of this document is to provide detailed instructions to help grantees complete Property Reports for their grant within the HRSA Electronic Handbook (EHB). Property Reports in EHBs consist of:

- Basic Information
- SF-428S
- SF-428
- Other Information

Note: This user guide can be used to complete **Property Report** for any grant program.

1.2. Document Organization and Version Control

This document contains four sections in addition to the Introduction. Following is the summary:

Section	Description
Before You Access a Property Report	Provides information that grantees need to know before they initiate Property Reports.
Completing the Property Report in HRSA Electronic Handbooks	Describes the steps necessary to complete and submit the Property Report in the Electronic Handbooks.
Customer Support Information	Provides contact information to address technical and programmatic questions.
FAQs	Provides answers to frequently asked questions by various categories.

Note: None of the screens displayed in this user guide are for real grants.

Revision History

Date	Reason for change(s)	Author(s)
10/10/2012	Original document	REI –Barbara Gould

2. Before You Access a Property Report

To initiate your Property Report, you will have to access the HRSA Electronic Handbooks (EHBs). To do this, you must register within the EHBs. The purpose of the registration process is to collect consistent information from all users, avoid collection of redundant information, and allow for the unique identification of each system user. Note that **registration within HRSA EHBs is required only once for each user regardless of the organizations they represent.**

If you already have a user account, you do not need to create another account. **Do not create duplicate user accounts.** If you are a new grantee organization user, you need to complete the following two steps to get appropriate access:

Individual users from an organization who participate in the grants process must create individual accounts in the system. To get registration guidance, go to https://grants.hrsa.gov/webexternal/home.asp and click Registration in the left navigation panel.

The user must then associate their account with the specific grantee organization. While searching for your organization, use your 10 digit grant number from box 4b of the NoA. If you recently received a grant from HRSA and have not registered before, this step will be applicable to you. Note that EHBs offers these roles – Project Director, Authorizing Official, Business Official and an Other Employee role. To work on and submit the progress report within the EHBs, please request the Project Director for the grant to assign you appropriate access (i.e. Edit Other Submissions, Submit Other Submissions).

For detailed steps on registration information, see *HRSA's Electronic Submission User Guide* (http://www.hrsa.gov/grants/userguide.htm).

For assistance in registering with HRSA EHBs, call 877-GO4-HRSA (877-464-4772) between 9:00 am to 5:30 pm ET or email callcenter@hrsa.gov.

3. Completing the Property Report in HRSA Electronic Handbooks

The next step is to complete your Property Report in the HRSA Electronic Handbook (HRSA EHB).

Users new to the EHBs should be mindful that the system times-out after 30 minutes of inactivity. Some forms may take a long time to complete. Users should ensure that they save their work at frequent intervals.

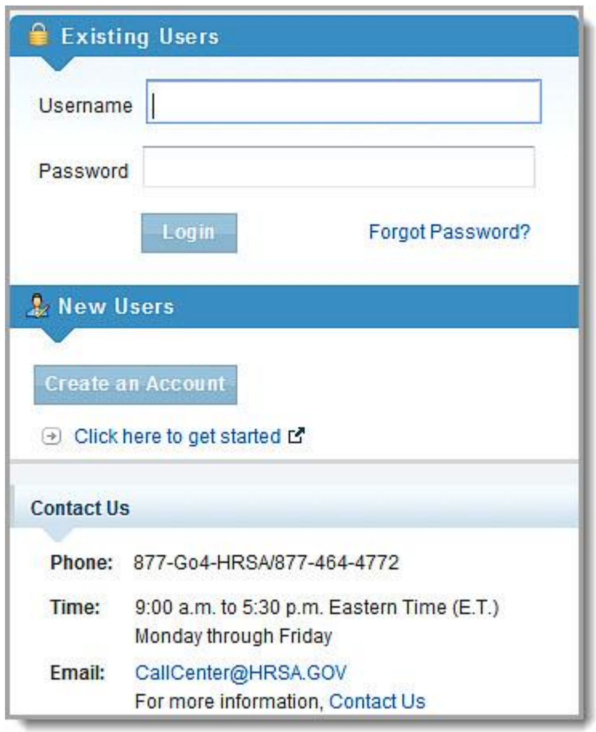
3.1. Login and Access the Property Report

3.1.1. Logging Into the HRSA Electronic Handbooks

Point your browser to https://grants.hrsa.gov/webexternal/login.asp.

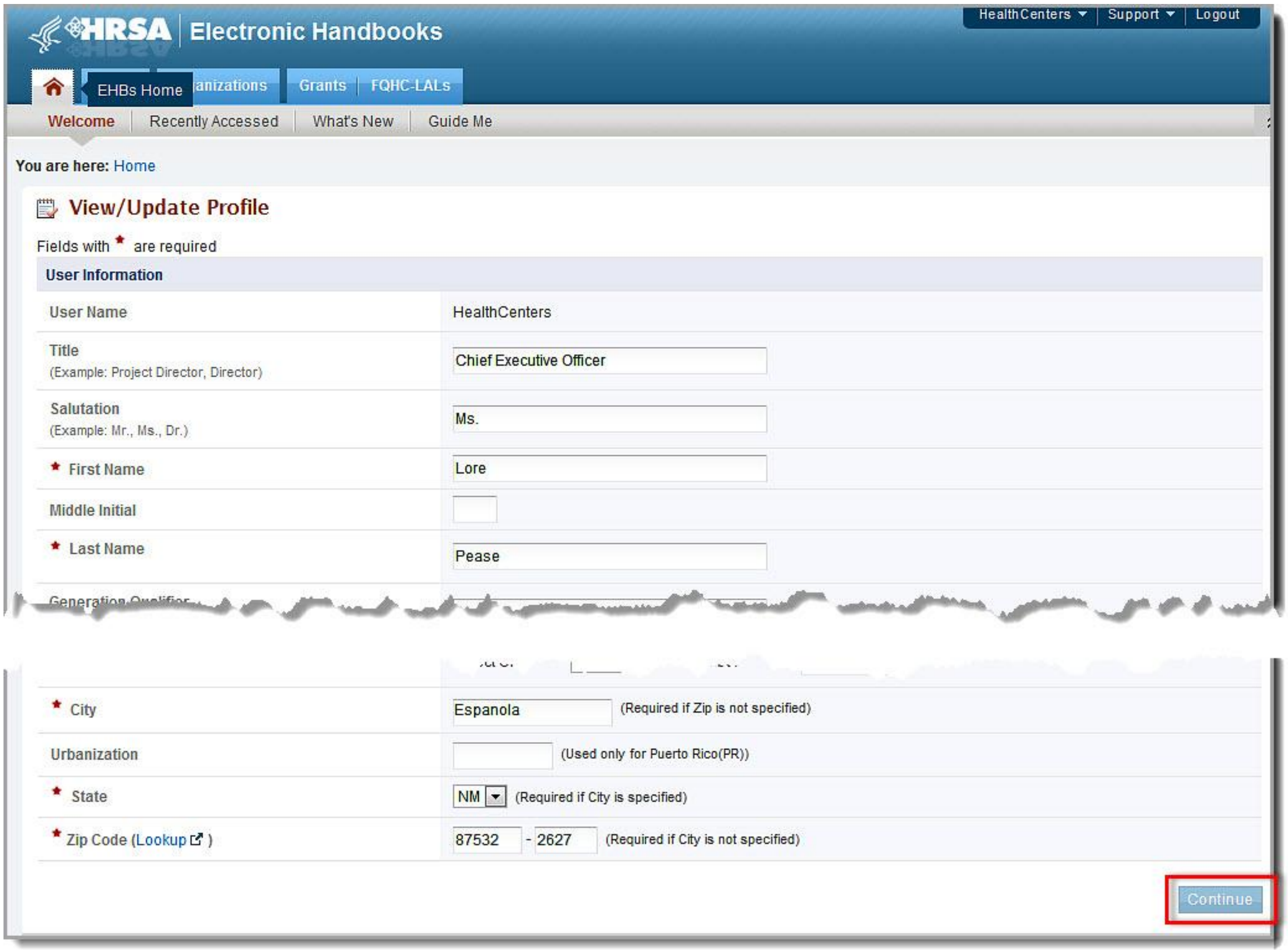
1. Enter your username and password.

Figure 1: EHB Login



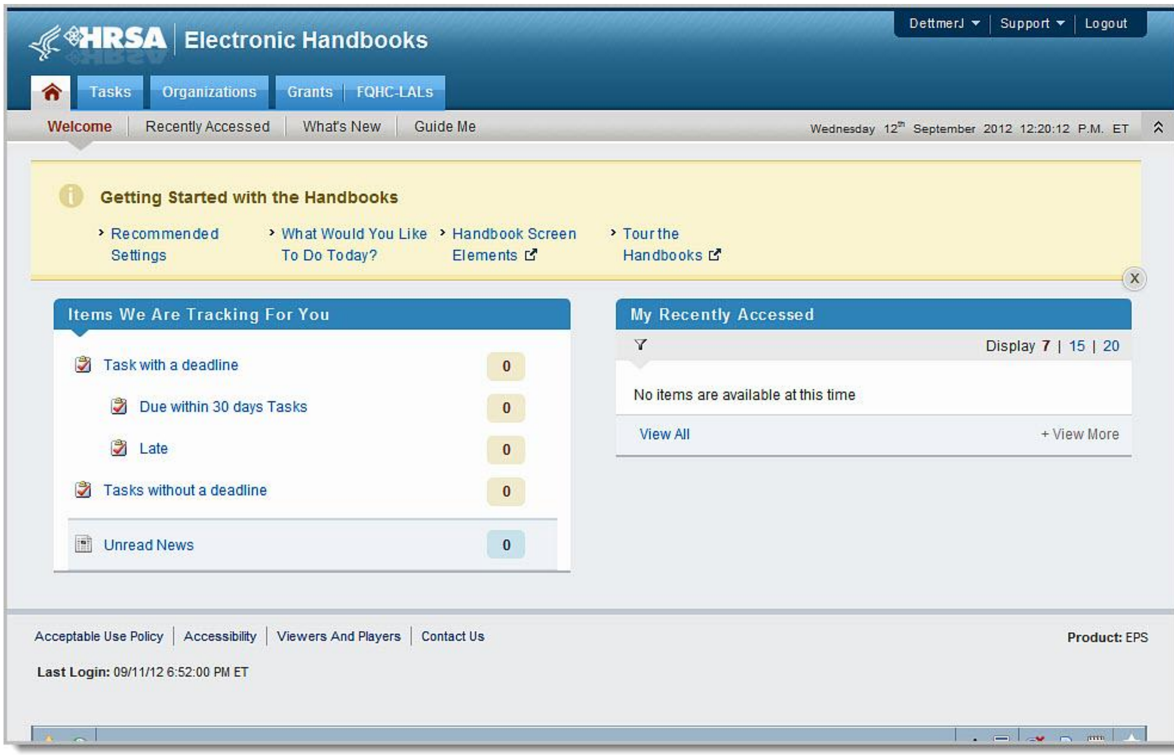
2. Click the Login button. The View/Update Profile page opens.

Figure 2: View/Update Profile Page



3. Ensure that all required fields are filled and are up to date.
4. Click the Continue button. The **View/Update Profile** confirm page opens.
5. Click the Confirm button. The **View/Update Profile** page opens with a green Success banner at the top of the page
6. Click the Continue button. The **HRSA EHB Home (Welcome)** page (Figure 3) opens.

Figure 3: HRSA EHB Home (Welcome) Page



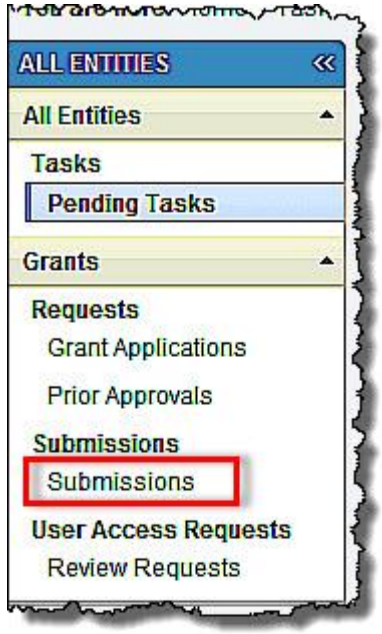
Note: Depending on your program, your **HRSA EHB Home (Welcome)** page may appear differently, and may not contain all the items listed in this figure.

3.1.2. Accessing the Property Report

Users who are accessing a progress report should follow these steps:

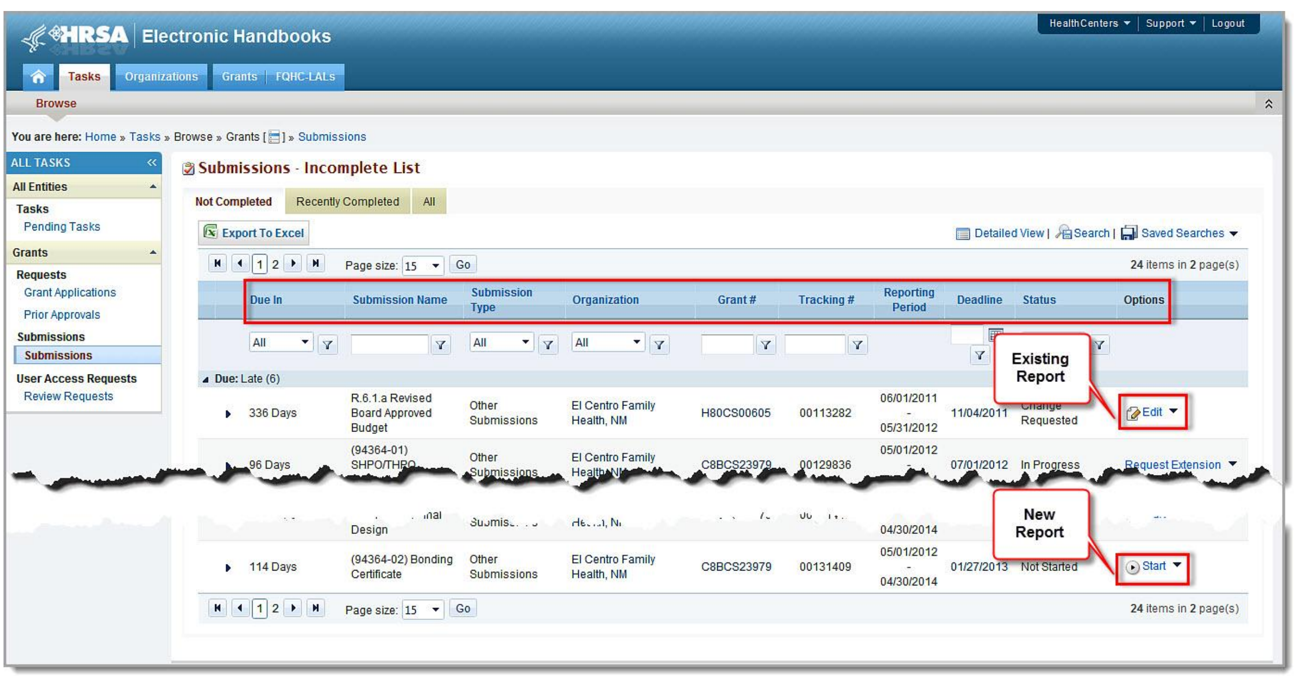
On the **HRSA EHB Home (Welcome)** page (Figure 3), click the Tasks tab. The **Tasks** page opens with the **All Tasks** list in the left navigation panel (Figure 4).

Figure 4: All Entities– Left Navigation Panel



1. Click the **Submissions** link. The **Submissions – Incomplete List** page opens (Figure 5).
2. Use the filters (in the red box in Figure 5: Submissions – Incomplete List Page) to find the submission you're working on by **Tracking #**, **Submission Name**, or **Grant #**.

Figure 5: Submissions – Incomplete List Page

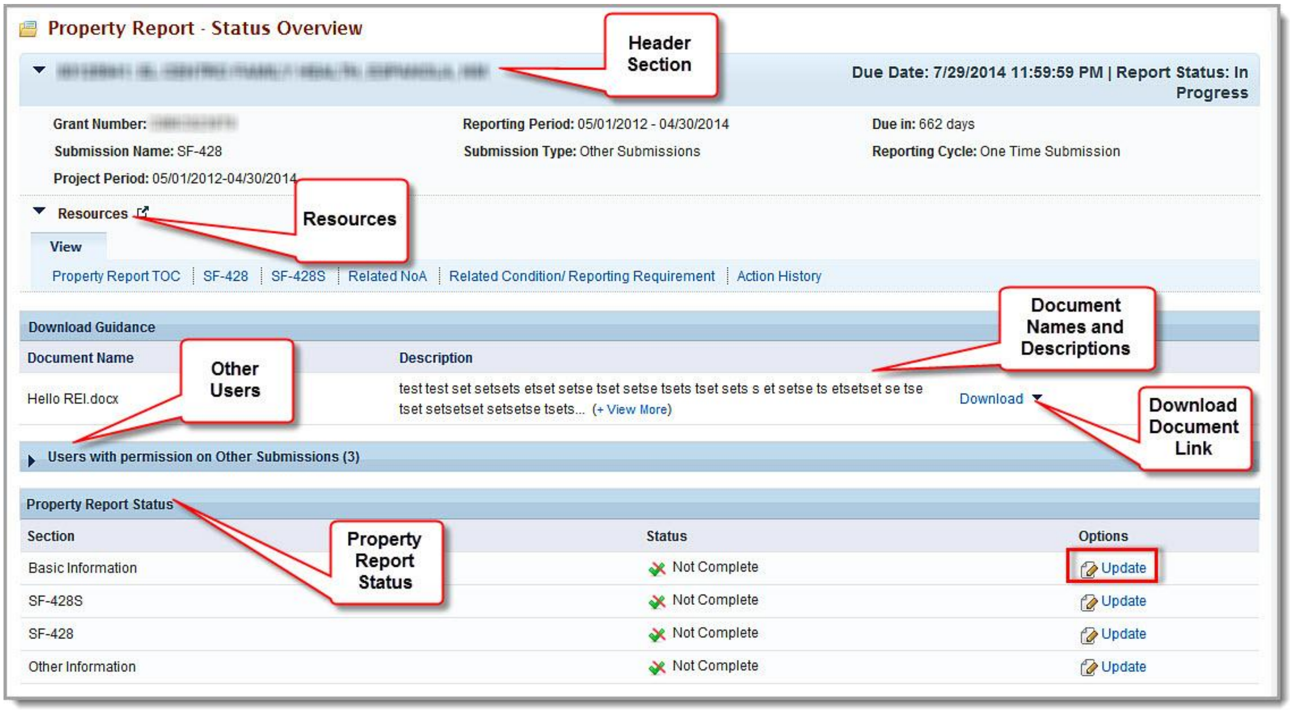


3. Choose the appropriate **Grant (Entity)** and click the **Start** or **Edit** link. The **Property Report – Status Overview** page opens (Status Overview Page
4. Figure 6).

Note: The screen contains a different left navigation panel than it did before.

3.1.3. Status Overview Page

Figure 6: Property Report – Status Overview Page



The **Property Report – Status Overview** page lists the status of each form making up the Property Report, links to read-only versions of the forms, and links to editable versions of the forms that need to be completed or updated.

The **Header** section contains all identifying information about the Submission.

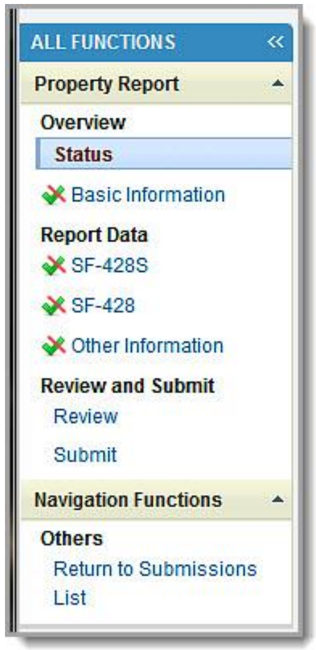
Under the **Resources** section View tab, there are sub-tabs that open read-only versions of the documents they represent.

The **Download Guidance** section contains a link to download a guidance document for your Property Report.

The fourth section, when expanded, lists the **Users with permissions on Other Submissions**.

The **Property Report Status** section lists all forms required for the report and their completion status: Not Complete or Complete.

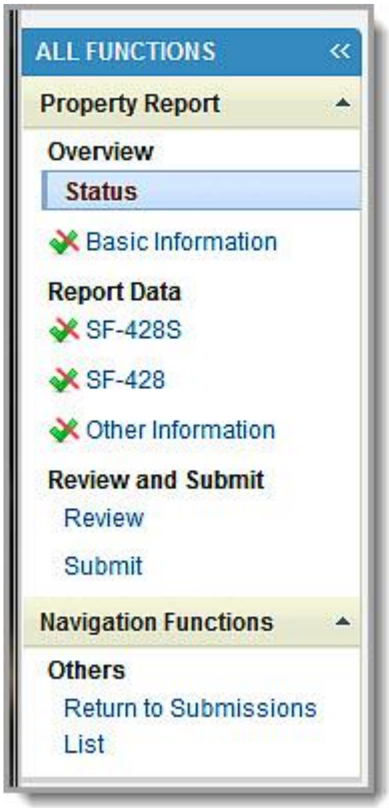
Figure 7: Property Report – Status Overview Page Left Navigation Panel



The **Property Report – Status Overview** page lists each section of the property report and its status: Not Complete, or Complete.

3.1.4. Navigating within the Property Report

Figure 8: Side Menu in Grantee Handbook



A navigation panel (Figure 8) appears on the left side of every screen in the Electronic Handbook. Use this panel to access the various pages of your **Property Report**.

You can always click **Status** under **Overview** go to the **Property Report – Status Overview** page to check your progress toward completing your entire submission.

The **Property Report – Status Overview** page shows the status of each Basic Information form (i.e., the SF-428 forms) and Other Information forms.

Note: You cannot submit your Property Report until all forms in all sections are complete.

Your session will remain active for 30 minutes since your last activity. Please save your work every 5 minutes to avoid unexpected behavior.

Note: For the purpose of this document, the left navigation panel will be used to access each form.

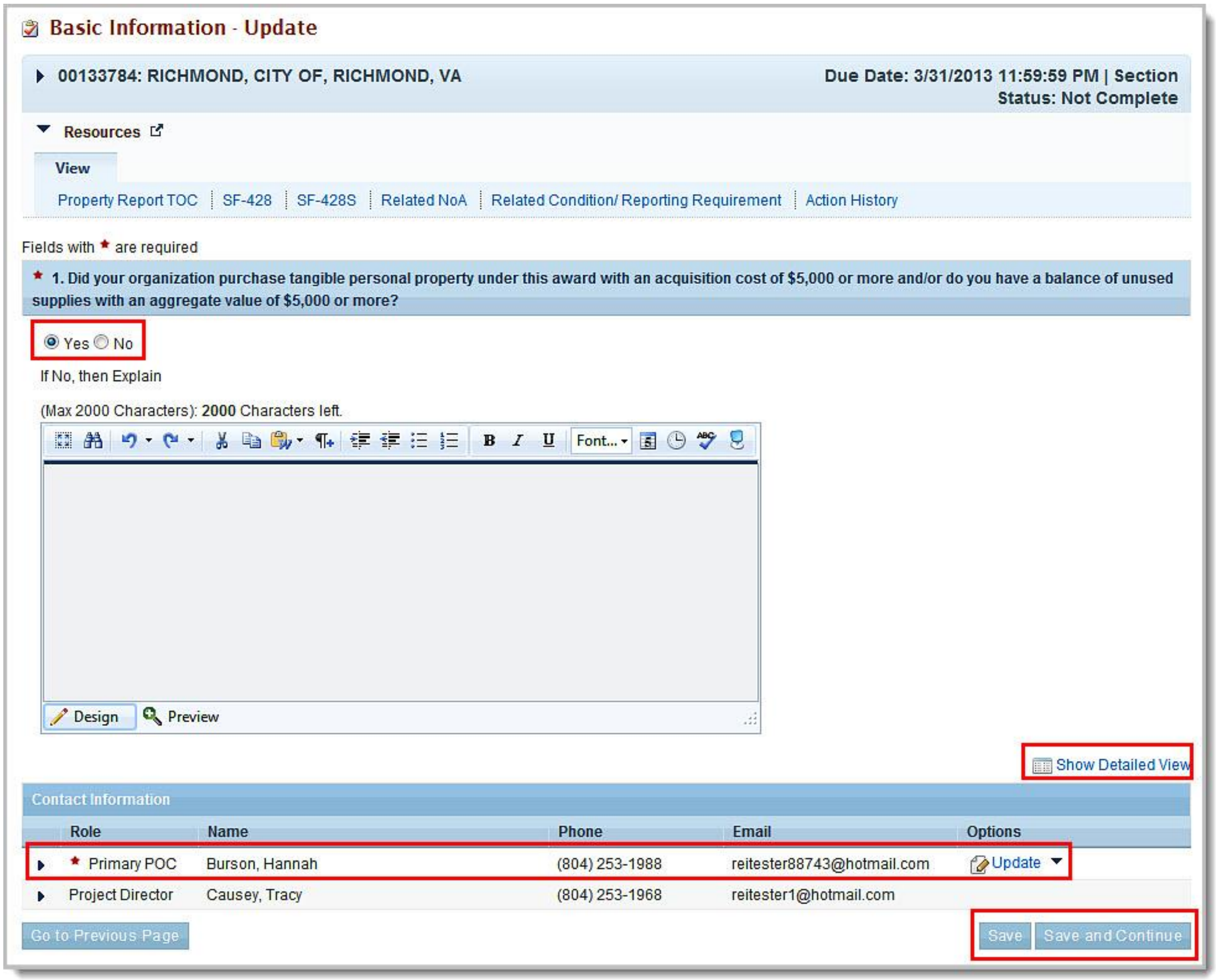
3.2. Navigating to the Standard Forms

To get to any of the forms used in the **Property Report**, click the appropriate link in the left navigation panel, or click the **Update** link for that form on the **Property Report – Status Overview** (Figure 6).

3.2.1. Basic Information – Update Page

The **Basic Information – Update** (Figure 9) page gathers or contains basic information about the property purchased with your Grant money, your Point of Contact (POC), and your Project Director. All fields with red asterisks (*) are required.

Figure 9: Basic Information Page – Update Page



1. Answer question **1** by clicking the appropriate radio button. If the answer is **No**, you ***must*** enter an explanation in the space provided.

Note: If you select "**No**" and click the Save button, the system will auto-complete section **SF-428S** and the **Other Information** section. You will not have to enter any information in these two pages. The default values for the two **Other Information** questions will be **N/A**.

2. If you want to view the details of the **Contact Information** section, click the **Show Details** link. The **Contact Information** section will expand as shown in (Figure 10).

Figure 10: Contact Information Section – Detailed View

3. If there is no POC listed, click the Add button under **Options**. The **Primary POC – Add** page opens.

3.2.1.1. The Primary POC – Add Page

The **Primary POC – Add** page gives you two different methods for selecting a POC. You can select from **Existing Users**, as shown in **Figure 11**, or you can expand the **Add New Contact Information** section and add a User to the list of Existing Users, as shown in **Figure 12**.

Figure 11: The Primary POC – Add Page (Existing Users)

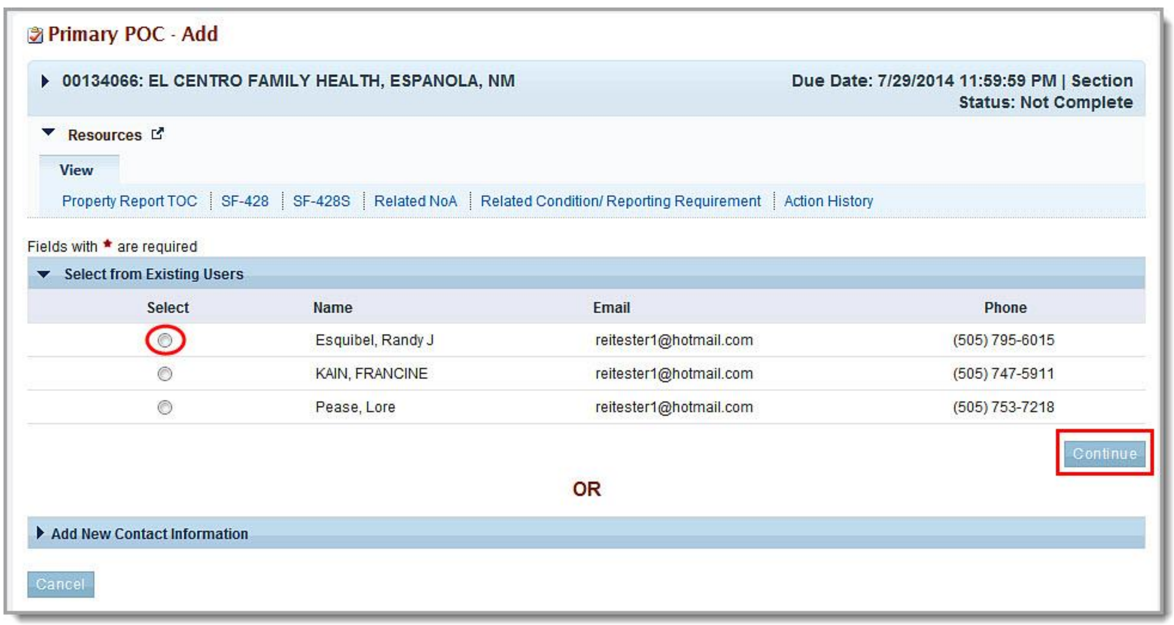
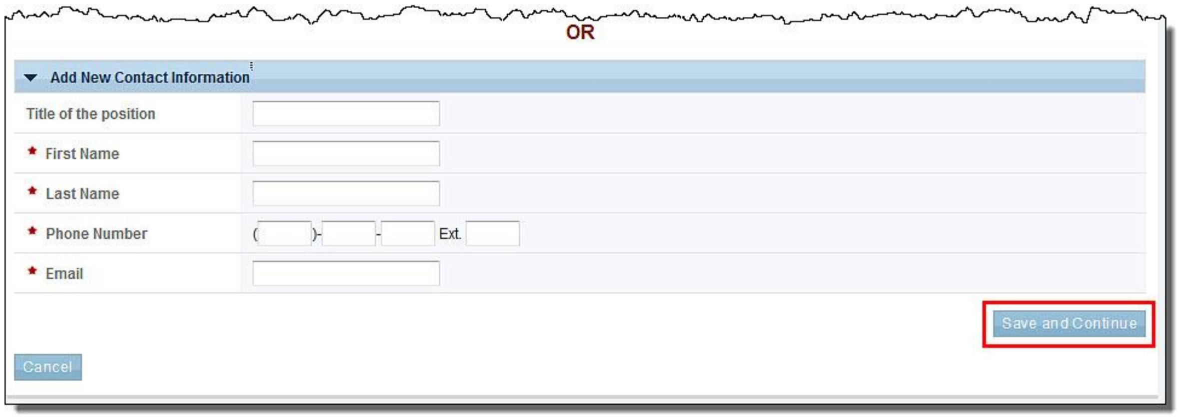


Figure 12: The Primary POC – Add New User

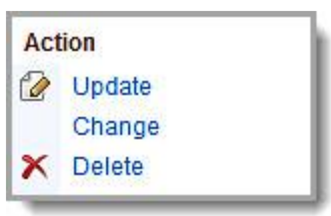


Note: In the **Add New Contact Information** section, all fields except the **Title of the position** field are required.

4. Click the Continue button after you have selected and existing user or click the Save and Continue button after you have created a new user to be returned to the **Basic Information – Update** page.
5. When all information has been entered on the **Basic Information – Update** page, click the Save and Continue button to proceed to the next form.

After a POC has been entered on the **Basic Information – Update** form, the **Add** link becomes the **Update** drop-down with three links, **Update**, **Change**, and **Delete**, as shown in Figure 13.

Figure 13: POC Contact Information – Action Options



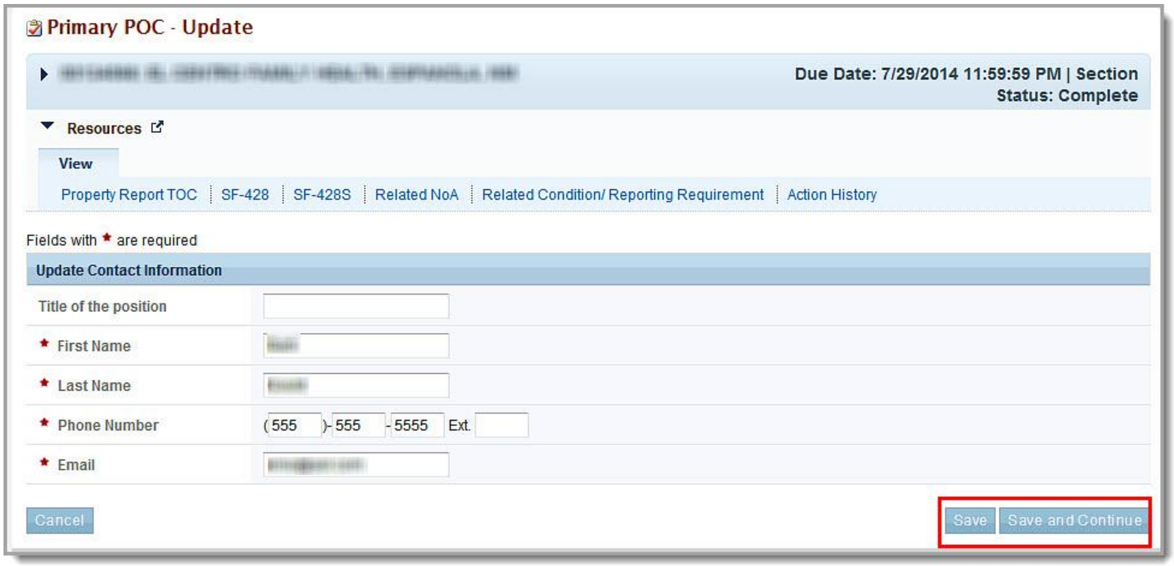
Options:

- ❖ UPDATE the POC information
- ❖ CHANGE the POC. This Option includes adding a new POC.
- ❖ DELETE the POC

3.2.1.2. To Update the POC information

1. On the **Basic Information – Update** page (Figure 9**Error! Reference source not found.**), click the **Update** drop-down for POC and then select **Update** from the drop-down. The **Primary POC – Update** page opens (Figure 14), and is populated with the information for the selected POC.

Figure 14: Primary POC – Update Page

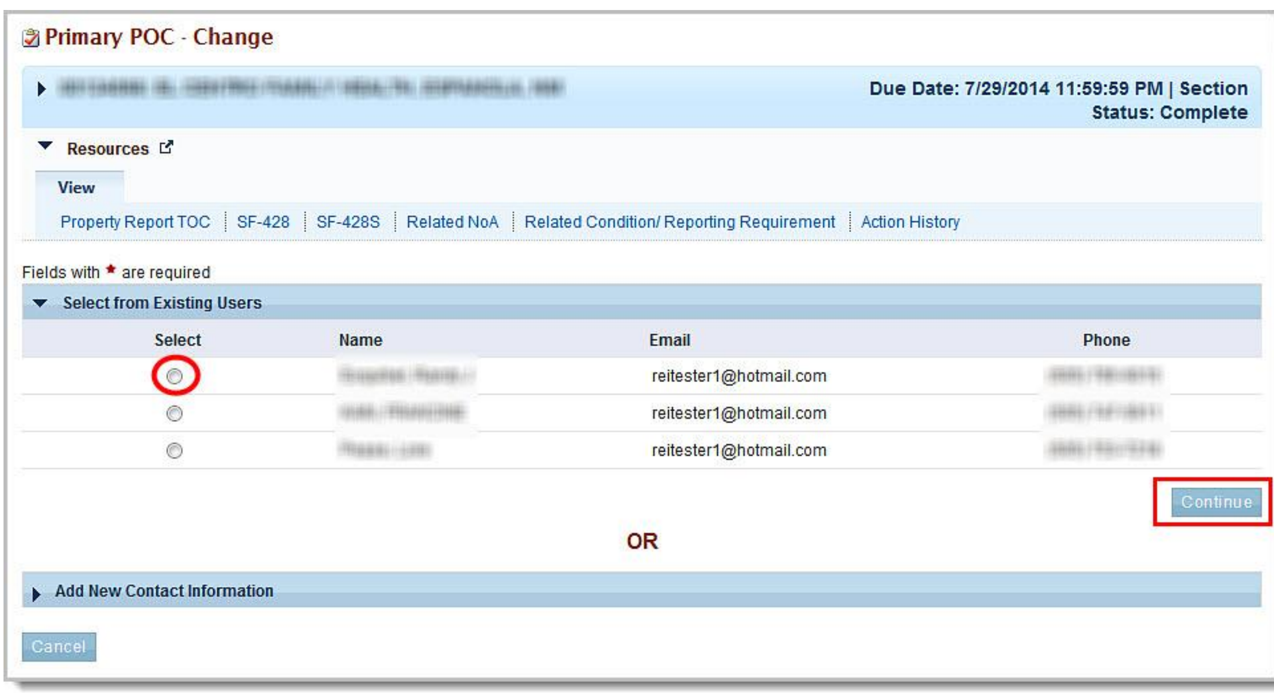


2. Verify and revise the contact information, as necessary.
3. Click the Save and Continue button to save your information and return to the **Basic Information – Update** page (Figure 9).

3.2.1.3. To Change the Selected POC

1. Click the **Update** link for a POC and then select **Change** from the drop-down. The **Primary POC – Change** page opens (Figure 15), and is populated with all the POCs registered for the grant.

Figure 15: Primary POC – Change Page



2. To change from the current POC to an existing user, select the user to be designated as the POC, if more than one user is listed, and click the Continue button to be returned to the **Basic Information – Update** page (**Figure 9**) with a green Success banner at the top of the page.

OR

To change from the current POC to a ***new*** user, expand the **Add New Contact Information** section, enter the required information, and click the Save and Continue button to be returned to the **Basic Information – Update** page (**Figure 9**). with a green Success banner at the top of the page.

Note: New HRSA employee users must register with the EHB. After the new users are registered within the EHB, you must return to the **Primary POC - Add** page to select the newly registered HRSA employee as a POC.

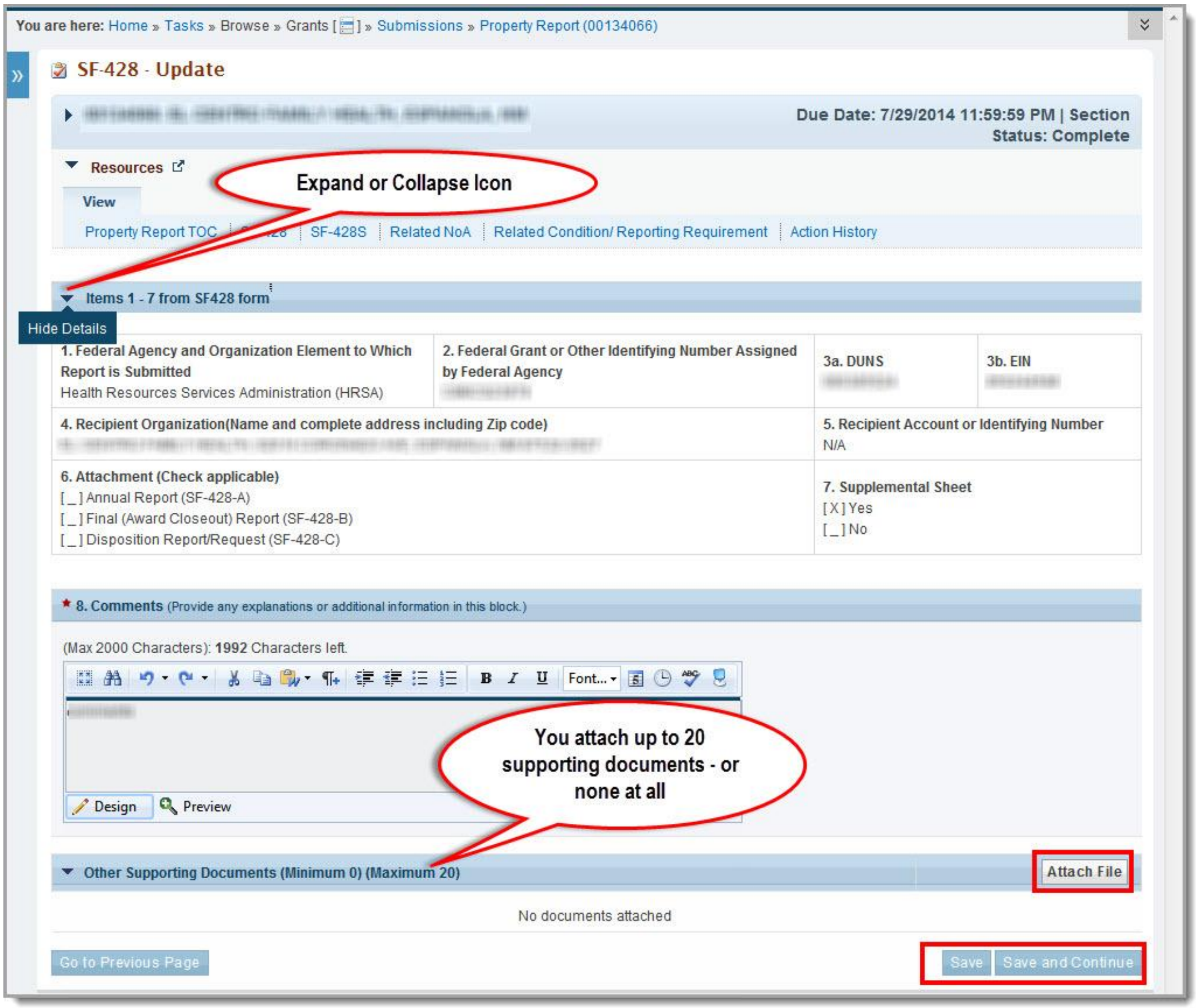
3.2.1.4. To Delete a POC

1. On the **Basic Information – Update** page (**Figure 9**), click the **Update** drop-down for a POC and then select **Delete** from the drop-down. The **Primary POC – Delete Confirm** page opens.
2. Click the Confirm button. The **Basic Information – Update** page re-opens and the POC that you deleted has been removed as the Primary POC. (However it will still be listed in the **Primary POC – Add** (Figure 15)**.**

If you are satisfied with the information on the **Basic Information – Update** page, click the Save and Continue button to save your work and proceed to the next form.

3.2.2. SF-428 – Update Page

Figure 16: SF-428 – Update Page



The **SF-428 – Update** page allows you to attach up to 20 documents to update the descriptions of the property purchased with your grant for the period covered by the **Property Report**.

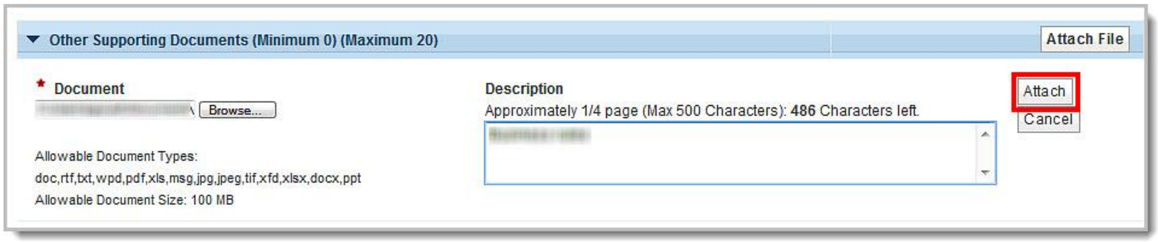
1. To open a read-only view of Items 1 – 7 from the SF-428 form, click on the Expand or Collapse icon, as shown in .

Note: Item number 6, **Attachment (Check Applicable)**, is not available in **Form SF428** at this time, nor is it applicable.

2. Item **8. Comments** is a required field for entering any explanations or additional information regarding your **SF-428 – Update** page updates or attachments.

3. To attach a file to the page, click the **Attach File** button. The **Other Supporting Documents** section expands, as shown in .

Figure 17: SF-428 – Update Page (Attach File)



4. In the **Document** field, enter the file name or click the **Browse** button to select the file you wish to attach.
5. Enter a **Description**, if appropriate.
6. Click the **Attach** button. The **SF-428 – Update** page refreshes, listing the document you just attached.
7. When you have completed your entries, changes, and attachment, click the Save and Continue button to proceed to the next form.

You can perform the following functions on this screen related to **SF-428 – Update** documents:

Options:

- Attach a document
- Update a document description
- Delete a document

3.2.2.1. Attaching A Supporting Document

To attach a supporting document to the **SF-428 – Update** page, follow steps 3 through 6 of section **1.1.1**.

Note: You are not required to attach any documents, but you may attach up to 20 files.

3.2.2.2. Updating a Document Description

When at least one document has been attached, you can perform the following:

1. On the **SF-428 – Update** page, in the expanded **Other Supporting Documents** section, click the **Update Description** drop-down.
2. Click the **Update Description** link.
3. Enter any changes you need to the **Description** of the attachment.
4. Click the **Save** button The **SF-428 – Update** page refreshes showing modified description.
5. Click the Save and Continue button. The next form opens with a green Success banner at the top of the page.

3.2.2.3. Deleting a Document,

1. On the **SF-428 – Update** page, in the expanded **Other Supporting Documents** section, click the **Update Description** drop-down.
2. Click the **Delete** link.
3. The **SF-428 – Update** page refreshes without the file you just deleted.

3.2.3. SF-428s (Supplemental Sheet) – Update Page

The **SF-428s (Supplemental Sheet) – Update** page contains information about the property for which you are creating or updating the **Property Report**.

1. Click the **SF-428S** link on the left navigation panel (Figure 16) to access the **SF-428s (Supplemental Sheet) – Update** page (Figure 19), if it is not already displayed.

Figure 18: SF-428s – Left Navigation Panel

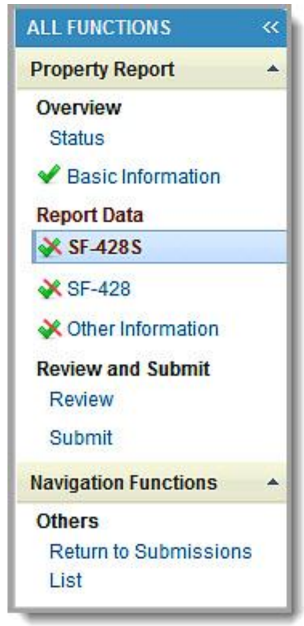
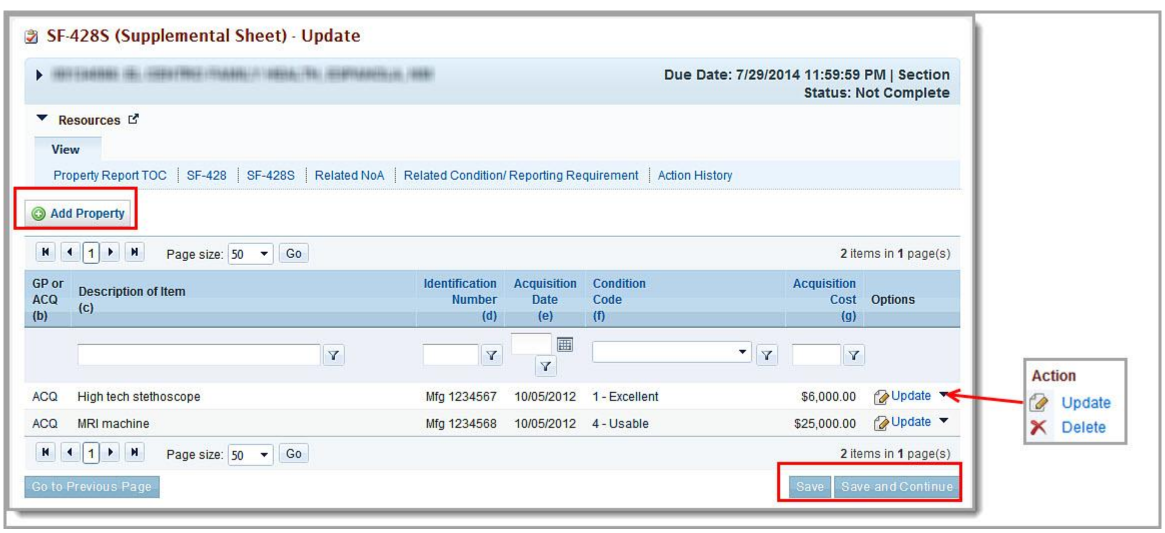


Figure 19: SF-428s (Supplemental Sheet) – Update Page



Use the filters for the **Description of Item**, **Identification Number**, **Acquisition Date**, **Condition Code**, or **Acquisition Cos**t to help you find the item you wish to update. After a property has been added, you can update or delete it from this screen.

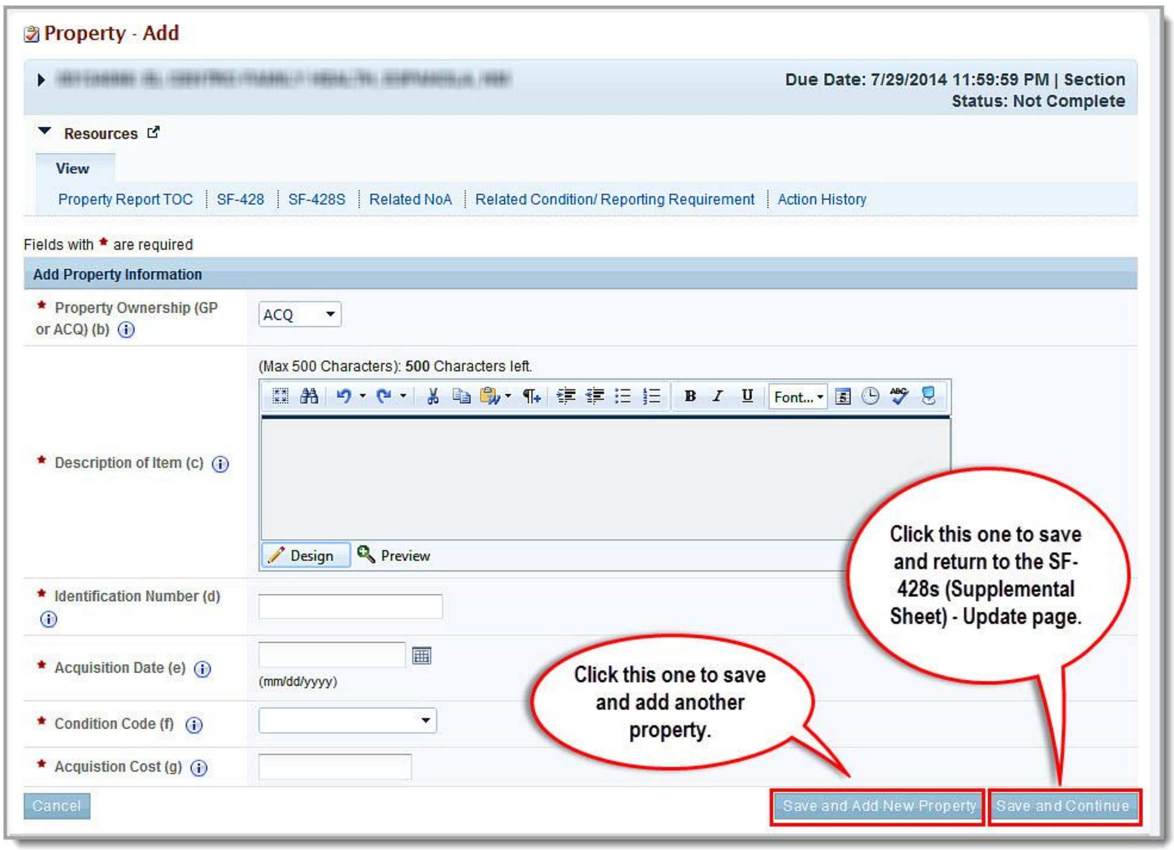
You can perform the following functions on the screen:

	Options: ❖ Add Property ❖ Update Property ❖ Delete Property

3.2.3.1. Adding Property

1. On the **SF-428s (Supplemental Sheet) – Update** page, click the Add Property button. The **Property – Add** page opens.

Figure 20: Property - Add Page



Note: If you hover your mouse over one of the Information icons ⓘ, a pop-up will appear to explain or describe the information that belongs in the related field.

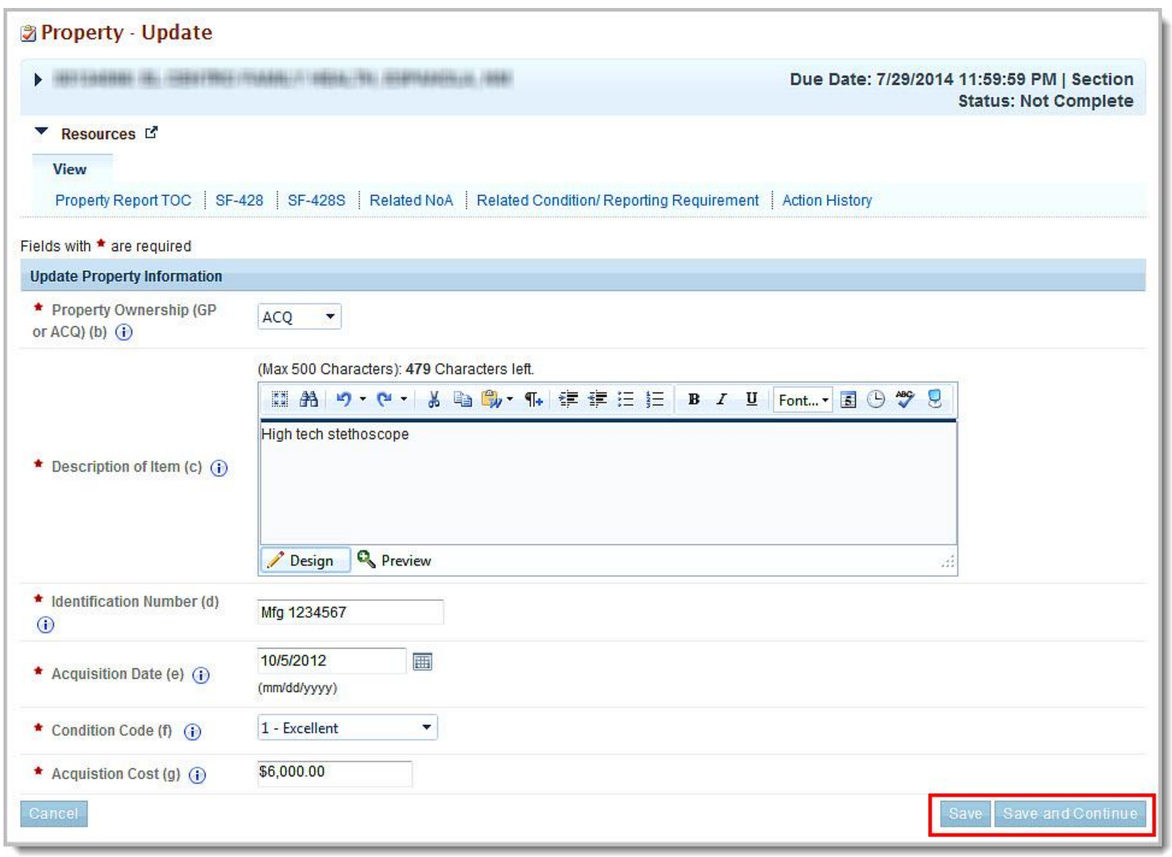
2. Click the **Property Ownership (ACQ)** drop-down to select the ownership code.
3. Enter a **Description** of the item.
4. Enter the **Identification Number**.
5. Enter or select the **Acquisition Date** from the calendar icon.

6. Click the **Condition Code** drop-down to select the condition code that best describes the current condition of the equipment (as of reporting date).
7. Enter the **Acquisition Cost** (just numbers – the system will add the dollar sign).
8. Click the Save and Add New Property button to stay on this page and add more property.
9. Click the Save and Continue button to return to the **SF-428s (Supplemental Sheet) – Update** page (Figure 19).

3.2.3.2. Updating the Property Information

1. On the **SF-428s (Supplemental Sheet) – Update** page, click the **Update drop-down** for and equipment item and then select **Update** from the drop-down. The **Property - Update** page (Figure 21) will open.
2. Verify or revise the contact information, as necessary.
3. Click the Save and Continue button to save your information. The **SF-428s (Supplemental Sheet) – Update** page re-opens with a green Success banner, showing the changes you made to equipment entries.

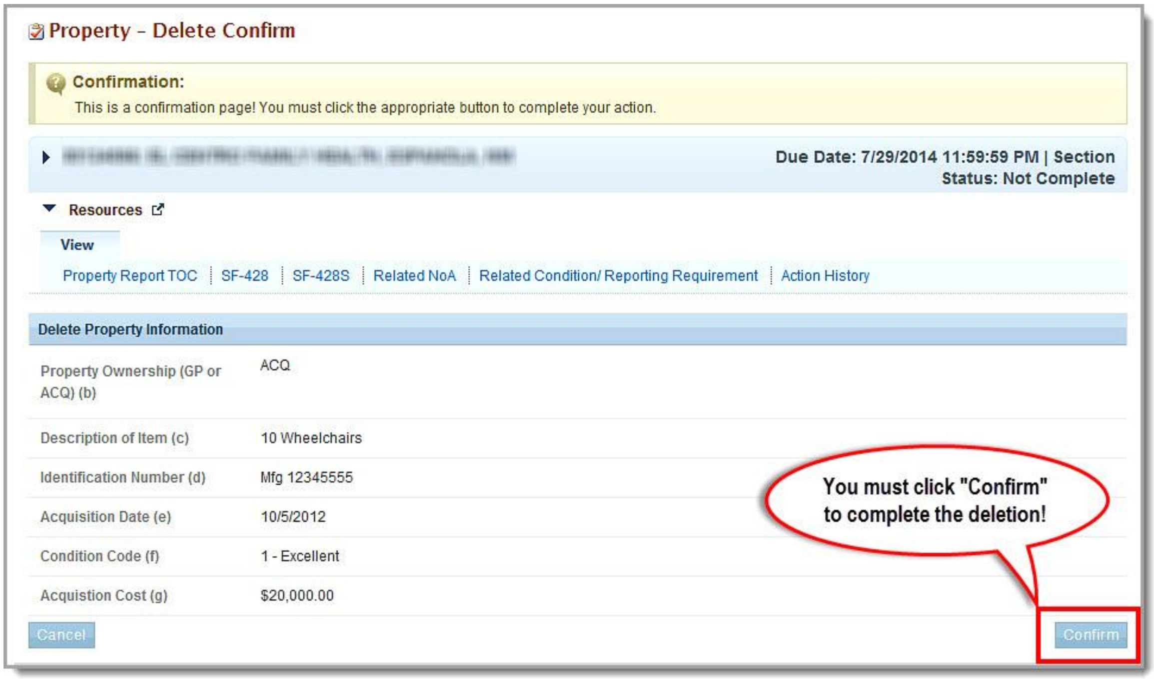
Figure 21: Property - Update Page



3.2.3.3. Deleting Equipment from the Report

4. On the **SF-428s (Supplemental Sheet) – Update** page, click the **Update** drop-down for an equipment item and then select **Delete** from the drop-down. The **Property – Delete Confirm** page (Figure 22) opens.

Figure 22: Property - Delete Confirm Page

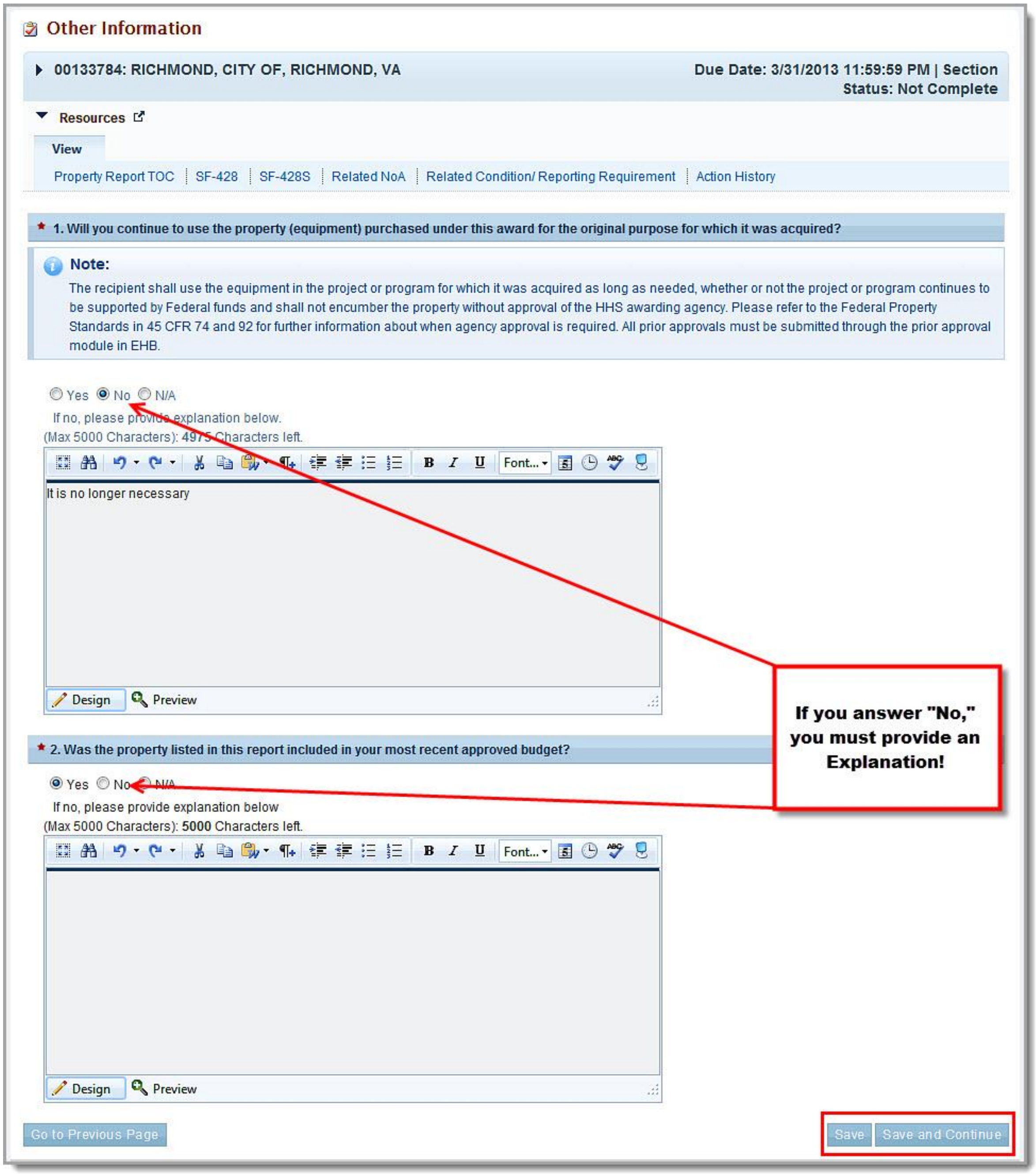


5. Click the Confirm button. The **SF-428s (Supplemental Sheet) – Update** page re-opens with a green Success banner, and the equipment that you deleted is no longer listed.
6. If you are satisfied with the information on the **SF-428s (Supplemental Sheet) – Update**, click the Save and Continue button to save your work and proceed to the next form.

3.2.4. Other Information

The **Other Information** page (Figure 23) relates to continued use of the equipment purchased and whether the equipment listed in the Property Report is part of your current, approved budget.

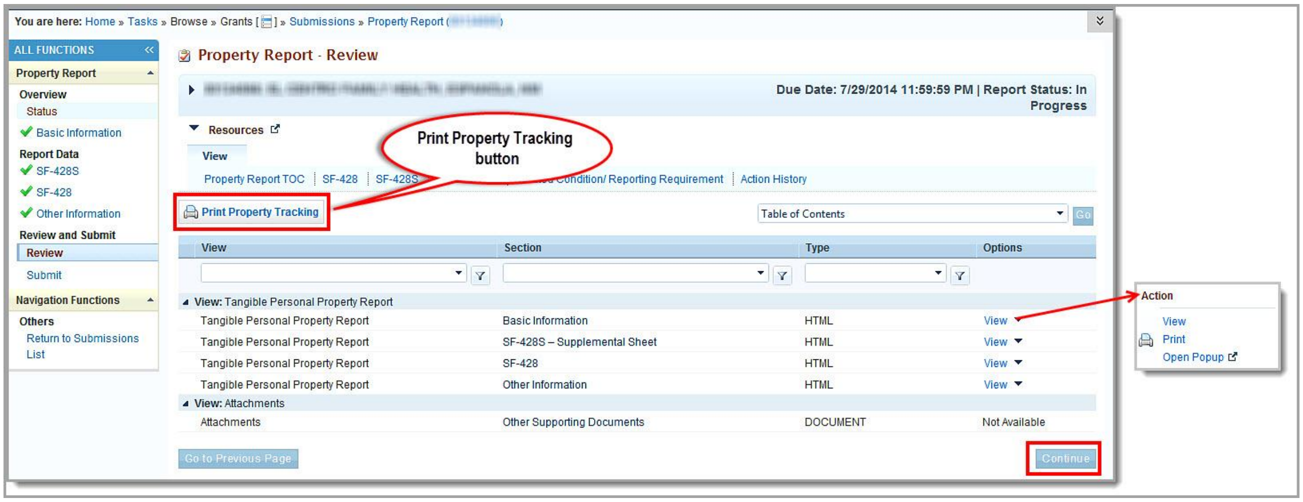
Figure 23: Other Information Page



1. Answer questions **1** and **2** by clicking the appropriate radio button.
2. If the answer to either question is “No,” then enter explanations in the appropriate areas.
3. Click the Save and Continue button to proceed to the next form.

3.3. Property Report – Review Page

Figure 24: Property Report - Review Page



The **Property Report - Review** provides a means to view or print read-only versions of each section of the **Tangible Personal Property Report**, or to print the entire report. All forms must be complete before you can submit your **Tangible Personal Property Report**.

1. To open the **Property Report – Review** page, click the **Review** link in the left navigation panel.
2. When you are satisfied that all information for your **Property Report** has been entered, is accurate, and is up-to-date, click the Continue button at the bottom right corner of the **Property Report - Review** page. The **Property Report – Submit** page opens. See section 3.4, Submit the Property Report for details concerning the submission of the **Property Report**.

3.3.1. Printing the Property Tracking Report

1. To print the entire **Property Tracking Report**, click the Print Property Tracking button. A PDF version of the **Property Tracking Report** opens in Adobe Acrobat.
2. Click on the Adobe Print icon to print the **Property Tracking Report.**
3. Close the window to return to the **Property Report – Review** page.

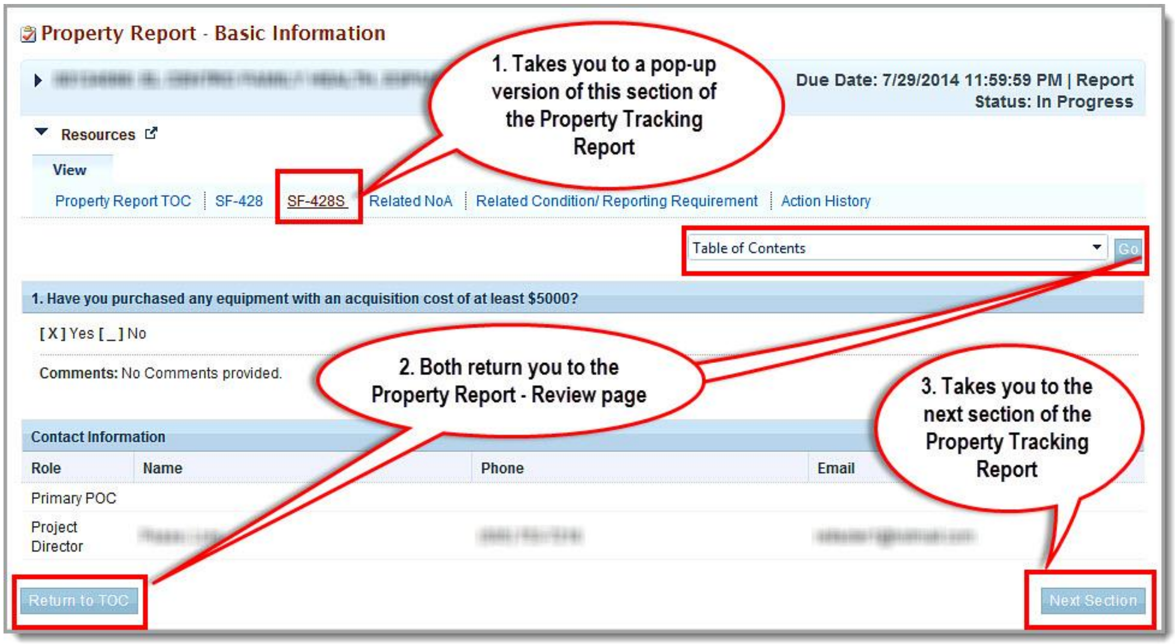
3.3.2. Viewing a Section of the Property Tracking Report

1. To view any **Property Report** form, click the **View** drop-down for the section you want to view.
2. Click the **View** link. A read-only version of the related online form opens. Figure 25 shows a read-only version of the **Property Report – Basic Information** page.

3.3.3. Printing a Section of the Property Tracking Report

3. To view any **Property Report** form, click the **View** drop-down for the section you want to view.
4. Click the **Print** link. A read-only version of the related online form opens. Figure 25 shows a read-only version of the **Property Report – Basic Information** page. You can print a copy of the HTML form

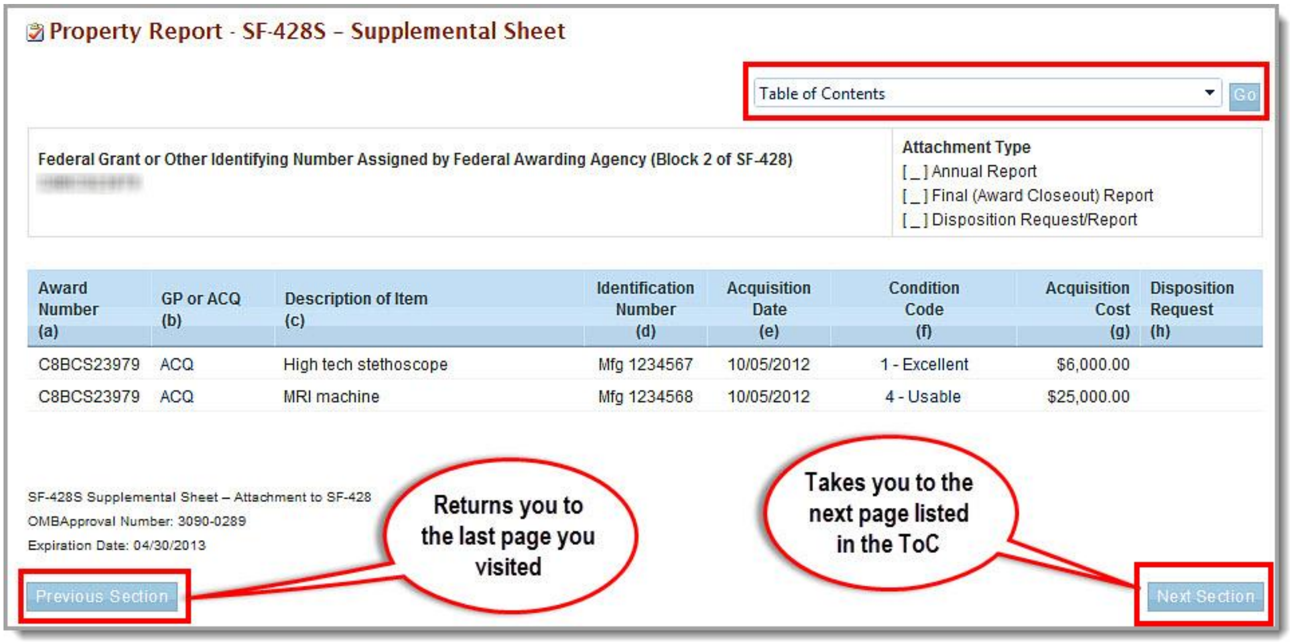
Figure 25: Read-Only Report Section (1)



The read-only pages of the Property Report sections provide you with several navigation options:

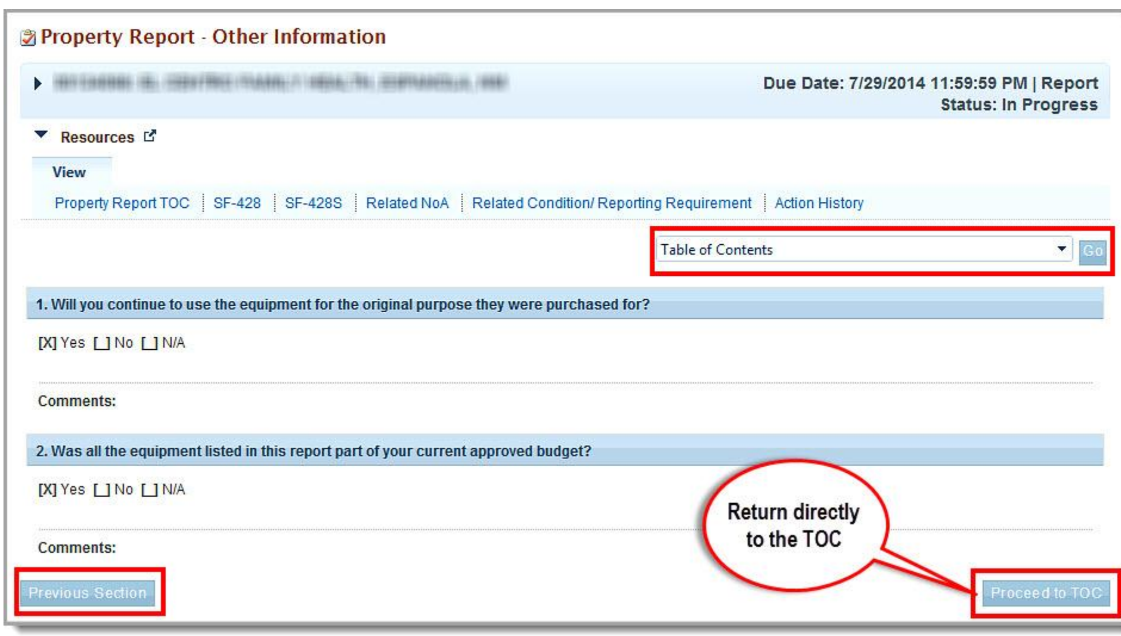
- Click one of the tabs to open a pop-up of a read-only version of the form it represents (**1**).
- Use the **Table of Contents** drop-down and then the Go button return to the **Property Report – Review** page or to go to read-only pages for any of the other sections.
- On the **Property Report – Basic Information** page, click the Return to TOC button to return to the **Property Report – Review** page (Figure 25).
- On the **Property Report - SF-428S – Supplemental Sheet** and the **Property Report – SF-428**, you can navigate to the previous or next page in the **Table of Contents** using the Previous Section and Next Section buttons, as seen in **Figure 26**.

Figure 26: Read-Only Report Section (2)



- On the **Property Report – Other Information Page**, you can navigate to the previous page in the **Table of Contents** using the Previous Section button and go directly to the **Table of Contents** using the Proceed to TOC button, as seen in [Figure 27](#).

Figure 27: Read-Only Report Section (3)



When you have finished your review and all sections are complete, click the Proceed to Submit button to go to the **Property Report – Submit** page ([Figure 28](#)) to initiate the **Submit Property Report** process.

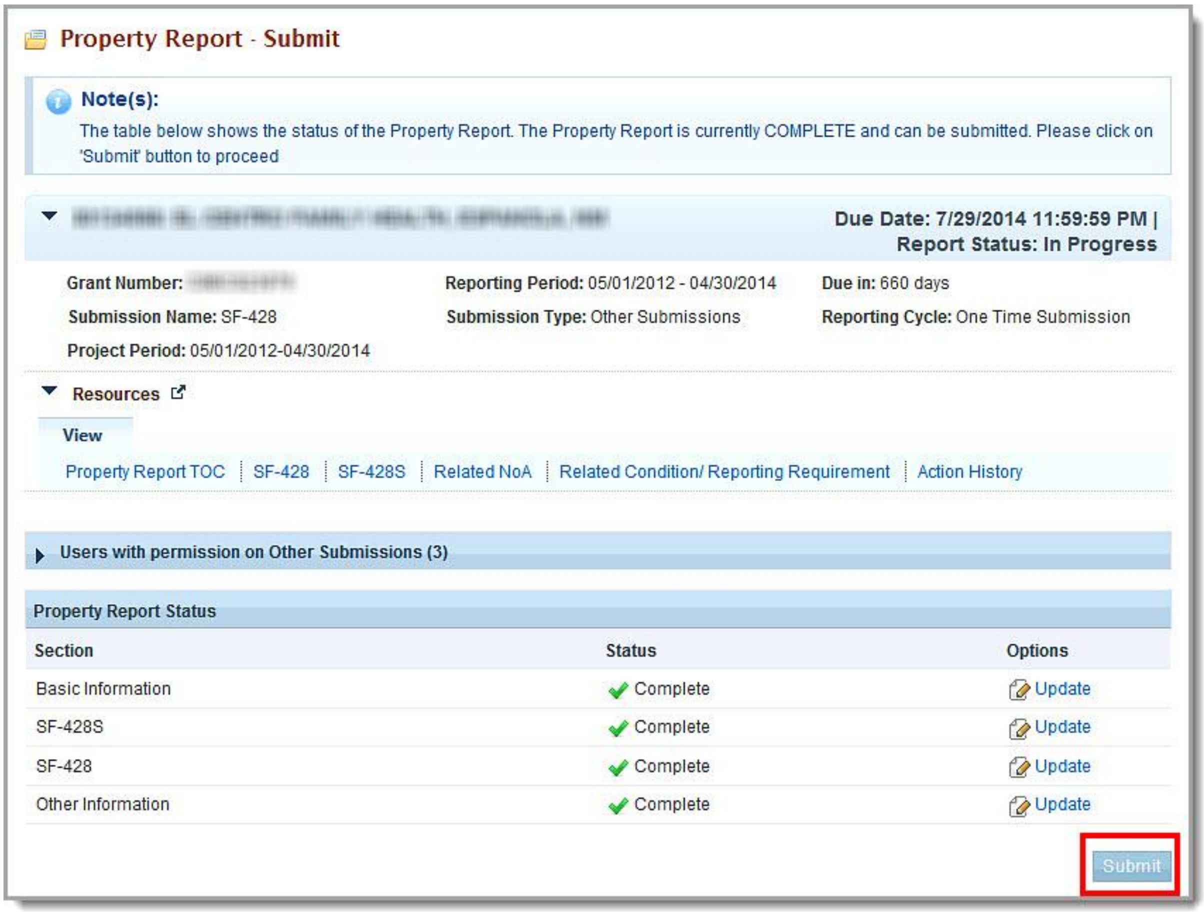
3.4. Submit the Property Report

Once all forms are complete, the **Property Report** can be submitted to HRSA.

To submit the **Property Report**, you must have the "Submit" privilege.

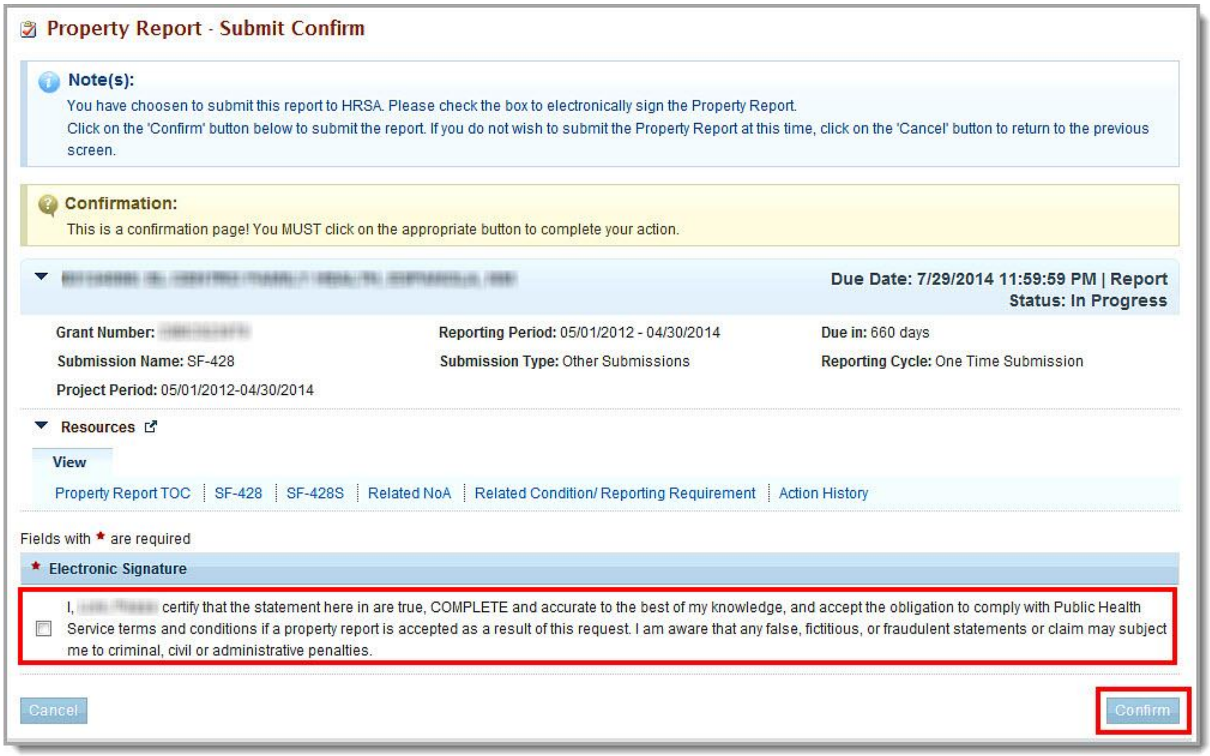
1. Under **Review and Submit** on the Property Report's left navigation panel, click the **Submit** link to access the **Property Report - Submit** page (Figure 28) if it is not already displayed.

Figure 28: Property Report - Submit Page



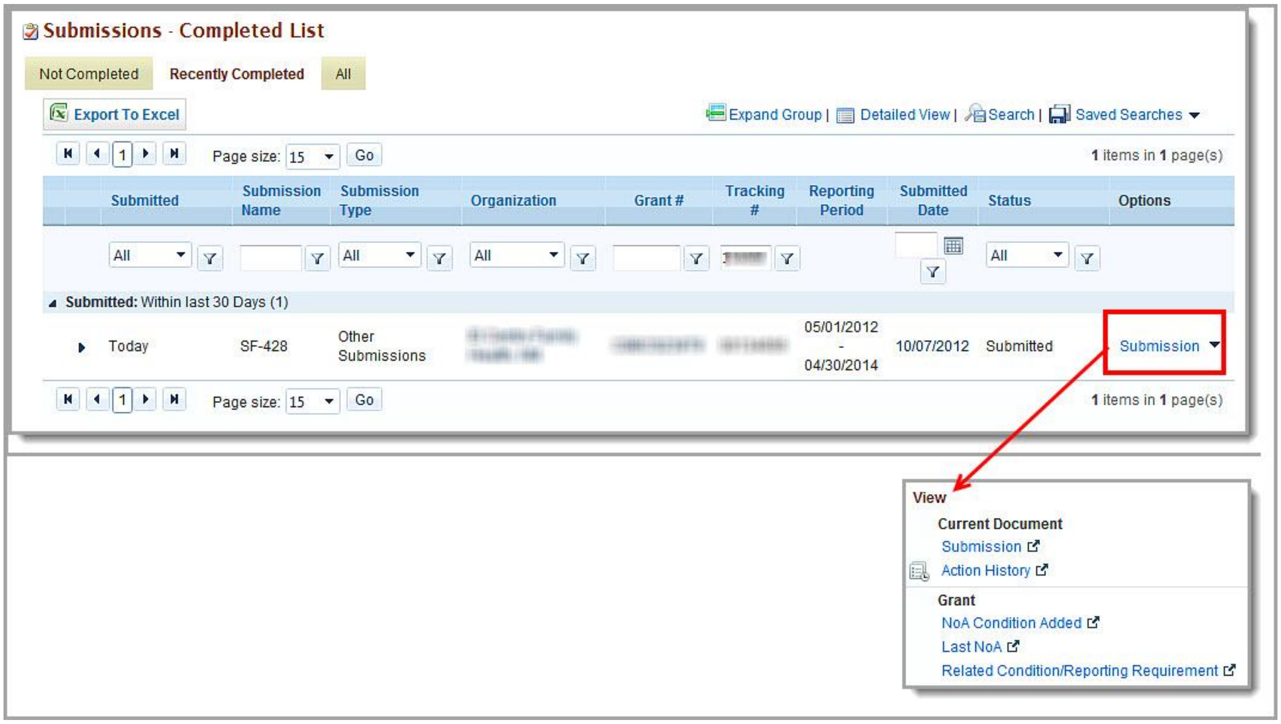
2. If all the forms are marked **Complete**, click the Submit to HRSA button. The **Property Report – Submit Confirm** page (Figure 29) will open.

Figure 29: Property Report –Submit Confirm Page



3. Check the box to electronically sign the **Property Report**.
4. Click the Submit Report button to submit your **Property Report** to HRSA. The **Submissions – Incomplete List** page will be displayed.
5. Click the Recently Completed tab. The **Submissions – Completed List** page (Figure 30) will be displayed.

Figure 30: Submissions – Completed List Page



6. Use the **Submission** drop-down to open links to read-only versions of the following:

- Under the **Current Document** heading:
  - **Submission** – Opens the **Property Report – Review** page
  - **Action History** – Opens the **Action History** page, listing the actions performed on this electronic submission, who performed them and when they were performed
- Under the **Grant** heading:
  - **NoA Condition Added** – Opens the **View NoA** page. Click the Terms and Conditions tab to read the Terms and Conditions connected with the Grant.
  - **Last NoA** - Opens the **View NoA** page to the most recent NoA issued for this Grant.
  - **Related Condition/Reporting Requirement** – Opens the **Related Conditions/Reporting Requirement** page. This page lists any related condition or reporting requirement associates with this Grant, its Type, whether it is a recurring requirement, its Due Date, the NoA number in which it is contained, and the text of the Condition itself.

3.5. Submitting Revised Property Reports

3.5.1. Edit and Submit Change-Requested Property Reports

Sometimes, after you submit a **Property Report**, a HRSA reviewer may request that you revise the contents provided in the Property Report.

If your Property Report is *Change-Requested,* you will receive a *Change-Request Email*, similar to the one displayed below asking you to make specific revisions in the report:

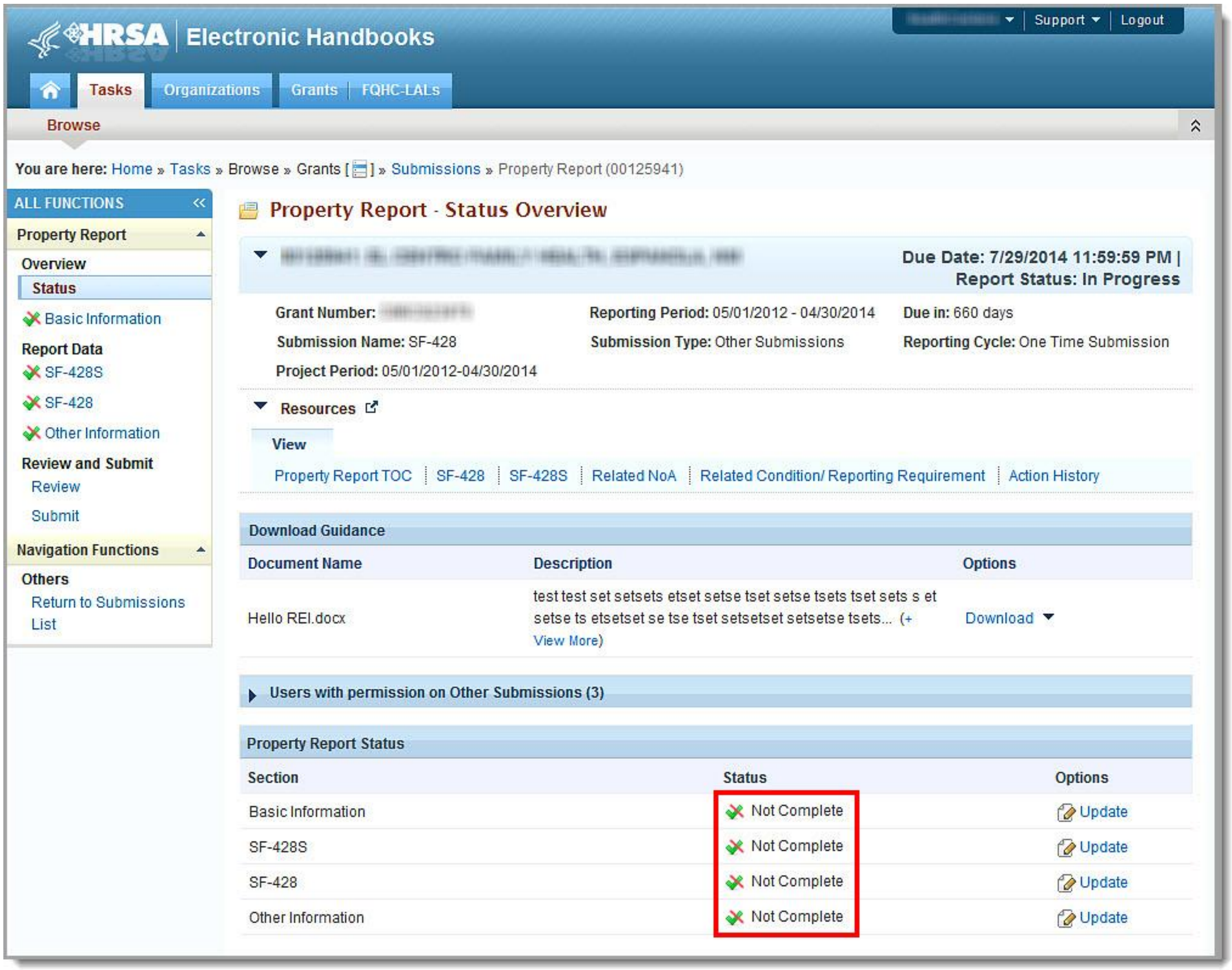
Figure 31: Sample Change-Request Email

From	[illegible]
Sent Date	10/8/2012 11:20:57 AM
To	[illegible]
CC	
Subject	Change Requested for Submission:SF-428 by HRSA
Message	A Change Request for following Submission has been requested by HRSA: Submission Name : SF-428 Submission Tracking Number: [illegible] Grant Number: [illegible] Following Comments were added by the HRSA Reviewer for your information: please revise the equipment list. This Submission will be available in EHBs from the Monitor Schedule Screen of Grant Hand Book. If you have any questions, please contact your PO. For any questions regarding online submission, please contact the Contact Center at 877-Go4-HRSA/877-464-4772 or Email at CallCenter@HRSA.GOV. NOTE: This is a system generated message. Please do not respond to this message.

After you receive the email you will need to edit and re-submit the **Property Report** noted in the email message.

1. On the **HRSA EHB Home (Welcome)** page (Figure 3), click the Tasks tab. The **Pending Tasks - List** page opens with the All Entities list in the left navigation panel (Figure 4).
2. In the left navigation panel, click the **Submissions** link. The **Submissions – Incomplete List** page opens.
3. Find the submission for which you wish to make changes and click the Edit drop-down.
4. Click the **Edit** link. The **Property Report – Status Overview** page for that submission opens.

Figure 32: Property Report – Status Overview Page



1. Click the **Update** link for the section that was noted in the *Change-Request Email*.
2. Follow the Update instructions for that section.
3. Click the **Review** link on the left navigation panel. The **Property Report – Review** page opens.
4. Review your entries.
5. Click the **Submit** link in the left navigation panel. The **Property Report – Submit** page opens.
6. If all the forms are marked **Complete**, click the Submit to HRSA button. The **Property Report – Confirm Submit** page (Figure 29) will open.
7. Click the check box to electronically sign the **Property Report**.
8. Click the Submit Report button.

4. FAQs

4.1. Software

4.1.1. What are the software requirements for HRSA EHBs?

HRSA EHBs can be accessed over the Internet using Internet Explorer (IE) v5.0 and above and Netscape 4.72 and above. HRSA EHBs are 508 compliant.

IE 6.0 and above is the recommended browser.

HRSA EHBs use pop-up screens to allow users to view or work on multiple screens. Ensure that your browser settings allow for pop-ups.

In addition, to view attachments such as Word and PDF, you will need appropriate viewers.

4.1.2. What are the system requirements for using HRSA EHBs on a Macintosh computer?

Mac users are requested to download the latest version of Netscape for their OS version. It is recommended that Safari v1.2.4 and above or Netscape v7.2 and above be used.

Note that Internet Explorer (IE) for Mac has known issues with SSL and Microsoft is no longer supporting IE for Mac. HRSA EHBs do not work on IE for Mac.

In addition, to view attachments such as Word and PDF, you will need appropriate viewers.

4.1.3. What document types can I upload?

The following document types are supported in HRSA EHBs:

- **.DOC** - Microsoft Word
- **.DOCX** - Microsoft Word
- **.JPEG** – Graphics Format
- **.JPG** - Graphics Format
- **.MSG** – Microsoft Mail Document
- **.PDF** - Adobe Portable Document Format
- **.PPT** – Power Point
- **.TIF** - Graphics Format
- **.RTF** - Rich Text Format
- **.TXT** - Text
- **.WPD** - Word Perfect Document
- **.XFD -** Extensible Forms Description Language files
- **.XLS** - Microsoft Excel
- **.XLSX** - Microsoft Excel