MCHB/DRTE

Brief Overview of EHB and a Guided Tour of the Application Webcast

February 2, 2005

MADHAVI REDDY: Good afternoon to some of you, I would like to thank you and welcome you to the first MCH training, MCHCOM.com. My name is Madhavi Reddy. I'm joined by Laura Kavanagh, and our presenters today are Jillian Robey and Christopher Dykton. They will be our presenters, they'll be talking about the Electronic Handbook system and how you can submit your progress reports this year. I would just like to say that the Electronic Handbook is a very interesting innovation that they have been heavily involved in. This will be her first year using Electronic Handbook to submit your progress reports. So Jillian is here to help you get through the registration process and show you all the little nooks and crannies, like the narratives, the attachments, and the reason you need to make sure the progress report is complete. And Chris is here to talk about programs-specific, administrative forms and performance measure forms that you will be responsible for submitting data to us for this year.

So I would like to now turn it over to Laura Kavanagh, the training branch, to give you a more formal introduction of Jillian and Chris and talk more about the Electronic Handbook.

LAURA KAVANAGH: Thank you very much, Madhavi. Happy groundhog day. We are happy we have the opportunity to take time to go over the electronic submission before you have to do your first progress report submission electronically. Staff at the bureau have had the privilege of working with SAIC in seeing this developed along the way. It's a very good system. And we look forward to this electronic submission, it gives us a lot of opportunities for analysis we didn't have before. So we are very excited about it. I also want to remind you that throughout this presentation, if a question comes to your mind you can type it into the computer in front of you in the question and answer area. We will collect the questions and answer them at the end. Also give you an opportunity at the end to type in any questions that you might have. And either we can answer them from a technical standpoint or a programmatic standpoint. We are waiting for the final guidance to be approved through HRSA. It is moving its way through the system. I anticipate, I mean our goal is that the release date for those of you who start July 1st, released by February 11th and due on April 22nd.

For those of you who have a June 1 start date, that means if you're continuing education, distance learning, collaborative office rounds or graduate medical education, or certificate programs, the release date when it will be available is February 6th and due on April 8th. Those are the dates we are working with right now. They might slide a little bit, depending how long it takes to get the guidance approved. Generally the same time frame we have had in the past. It's my pleasure to introduce two folks, start with Jillian. As Madhavi mentioned, she'll walk you through the registration process, the first introduction to the electronic symptoms, and then Chris will talk about the performance measures. Thank you very much.

JILLIAN ROBEY: Thank you, Laura and Madhavi for giving me this opportunity to expose everyone to HRSA's Electronic Handbook and how you will use them -- [inaudible] today we will go through completing the THS2065 forms and the program specific forms. They are generic, like forms you have seen many times before, it's broken down into separate pieces. So when you first access the website this is what it looks like. URL is right there. And you would click on the registration link in the menu on the left to register. Everyone that needs access to the site has to register to create a user name and password. The next slide. And then that user account is associated with your association. What you'll need in order to register is the grant number. By having your grant number it ensures that you associate the account with the correct organization in the system. So registration is all the information, your name, phone number, email address. Key point to the registration process is choosing your role and entering your grant number.

There are three distinct roles in the Electronic Handbook. Most of you will be other employee, which is anyone that would need to do data entry, project directors, that sort of thing. And the official is the person at the organization who finally submits the application. For more information about that, you can click on more information links or help link throughout the system. Once you create your account, by entering your grant number, your organization has brought us, you would click add me to this organization in order to associate that account. You won't be able to log in and complete any progress reports until you add yourself to that organization. So you would click on add me to this organization. And this is what it looks like. Several options on the left. We can manage applications, view grant portfolio, and update the personal profile. In order to complete the progress report, you have to add the grant to the portfolio. We won't worry about the managed applications today.

The project director has to register and add the grants to the portfolio, and then the director is responsible for determining who has access and what type of access they have to any of the poster board requirements that are due. So every user that has to access the report must register on the system, and once they do that, they can request access from the project director. So the project director would click on add to portfolio. Anyone that would need access would click add to portfolio, enter the grant number, and whether you are the project director or another employee that would have to access poster board requirements. The project director information is validate d -- validated from the notice of grant award. They will need a copy of the notice of grant award in order to add it to the portfolio. You will need the date that the grant award was issued, as well as the other letters for your organization. And once that is validated in the system, you get a confirmation page. Throughout the system you will receive confirmation pages. You will enter data on one page, the next screen will have the data you are entering.

Once the grant is added to the portfolio, you will see the summary. Multiple grants will be all listed, once you add them to the portfolio. To access the specific grant itself, you click on the manage in the right-hand column. From within this portfolio you'll have access to five years of past notice of grant awards, and also any of the required reports you have to submit to the Electronic Handbook. Today because we are going over the progress report, you can find that in the non-competing continuation. So you see there on the last, we have the non-competing continuation. This is where you access the report. You can actually go into the system and register now. The report won't appear until after the guidance has been approved and the link is enabled but you could register and you will see anything that you have that is coming up. So if you have something due, it will appear there. You would click on start application to actually begin the progress report. Some key things to point out about the application or the progress report, all sections of the application must by marked as completed. There are two ways you can access two section.

Either click on update or you can click on the section name and navigate to that section. We'll see that on the data page. So in the column on the right we have the option to update, and then we have also the name of each section on the left. Like I said before, these are forms you have seen many times before. Just broken down into separate pieces. Really minimizes any budget issues with, in terms of adding, make sure that numbers match throughout the report. The first, what we are going to do actually is go through each section, and then move on to the program specific information section. First section, a lot of the information will be prepopulated, it's pulled from the database, and this is a report on an existing grant, the information will be in there already but you can make changes if you need to. The top of the applicant section just has your organizational information, and then as you scroll down you would see the project director, business officials, single point of contact. The top three will be prepopulated based on information that was already associated with this grant. But you will have to choose an authorizing official.

From a system point of view, the authorizing official must register and choose the person in the application in order for the application to be fully complete. And once the person registers, then you'll be able to choose them in that section. Okay. So anyone that has registered already is an authorizing official for your organization will be listed there. If the correct person has registered, you can just click on add person or if the person is not registered, you can request a new one and it will send them an email with instructions for registration. Now if we had selected the person listed there, they appear. Two different options we have on each page. You can either cancel and save, or we can go back and proceed to the next section. Any time you see a save button, it will save that part of the section but will not mark it as complete. Any time you see a proceeds to next section, it marks the section that is complete. So even if you don't have anything to upload for a particular section, you would still need to go through and proceed to the next section in order for the data page to be updated. Now we move to the project section.

Okay. So on this page, like I mentioned before, these are the required, I'm sorry, generic forms. So there might be fields listed there that are not required. On this page there's a space for project abstract. This is actually not where you would include the project abstract for this report. You would do that later in the program specific information section. Unless something is mark -- marked with a red asterisk, you don't need to include that. Budget section, each report you would add separately. And so each personnel you would click add new personnel. And you can choose from anyone that's been registered in the system, anyone in the organization that is registered, or people that had been associated in the past. And you can select that person by clicking update selected person budget.

And then you would enter the information for that person. Once all of that information is entered, you save the form and it will take you back to the page where you see your, each individual record. Now you see the changes that you had just made. You would do that for each personnel that you have to add or change the budget for.

Now we have the detailed budget, other non-training expenses, this is where you would enter any of this information that you have. None of these are marked with a red asterisk. Use the guidance, make sure you follow the directions and the guidance. The forms are generic, there might be fields that the guidance and the system don't require, so that you don't have to enter information there. You'll continue to enter stipend information. You would enter the number of stipends and the amount of the stipend. This also gives you a section for the budget justification. This is not where you would enter the budget justification for the progress report, you would include that as the budget narrative. An example of generic forms, a narrative is not required, but the justification is. We'll do that later on in the application. So after we entered each section's information, we see that the totals come up. We are only concerned about one year for this progress report. So it's only giving us that one year. If we are doing a new application, we might have multiple years we would see listed there. And here is the consolidated budget, again the numbers would have to match the numbers from the detailed budget.

Now we move on to the budget narrative. And this is where you would attach your budget justification, like I mentioned earlier. You can browse the file on your hard drive and then you would attach it. You can delete the file and update a new one if you have any changes. And we would then proceed to the project section. This is where you'll attach the project narrative. So again, you would search your computer to find the file. You would complete that file in a word document and upload it as an attachment. You have up to 500 characters where you can enter a description for the attachment, but that's not required. Proceed to the next section. You have to select yes or no for each item in the checklist. This is actually a long page but this is what it looks like, just showing the top of the page. At the about Tom you -- at the bottom you have the option to proceed with the next section. Biographical sketches, if you don't have any you would proceed to the next section without uploading anything. And again with letters, as required by the guidance, or if you have any that you need to upload with your progress report. You can do that here. If not, you would proceed to the funding priority. And there will be no funding priority requests for this particular progress report. Again, you leave the section blank and proceed to the next section.

Once you proceed through all of the forms, we see the status page. Each page is marked as complete except for the program specific information. That has a whole separate menu which Chris will go over in a moment, but we see all the information we have entered has been completed. So turn it over to Chris now.

CHRISTOPHER DYKTON: Thank you, Jill. I'm going to take you and go through a program specific information link within the EHB. So far you have gone through the main menu. As you go through each section of the main menu you see that most of these, the data that's being requested is very small amount of data. It's a series of financial figures here, and attachment there, and so forth. But once you go to program specific information you are going to see a great deal more information that's required. The program specific information section collects the program data and the performance measure data that MCHB wishes to gather from the grantees in order to report to congress. And there is an O and B approved package of the data measures and collective forms that constitute the program specific information section.

Now, when you go to the program specific information section, it's divided into four parts. There is the financial data, there is program or demographic data. There's the performance measure data, both national and program. And there's additional data elements. The forms in this menu are the ones that have been selected for your guidance. So if you are working on the one training grant, your menu will be different than someone else's. Let's take a look at this. This gives you an idea of what the menu for the program specific information looks like. This is not a complete set of the possible forms but just gives you a sampling of the different forms in the section. We'll go through some of the forms, fill them out, discuss how they operate and what they are trying to collect. One of the things that is important to note at the progress report is that you are going to be helped as you go through each of these forms when you come back to the main menu. It will note it is complete or incomplete. Form 1 here, the first budget form. If you notice the amount of the grant award at the top would be the same amount that you had filled out on the budget form 6025.

The federal allocation request is brought automatically over here. Look at where the red parens are, that is exactly the information being gathered on, in addition to the grant allocation amounts that you are requesting, but it's the information that has to do with how you are leveraging funds. You would enumerate the values, the figures in this section. This provides what the total project is that is bringing to bear on the training program. Let's go to the next slide. At the bottom of form 1 you have a list of other federal programs that may be contributing funds. You would include those here. As you enter this data in on the form, it automatically calculates the total for you, and you would save this form by clicking the save button at the bottom. So we have finished form 1, now we are going on to form 2. Form 2 looks at the budget for the training grant across the years of the grant. And as you can see in the column for 2005, the amount, the figures that were completed on form 1 have been brought over. You don't have to reenter them, they brought over automatically. If you wanted to change the information, what you would do is go back to form 1 and change the values on that form.

What this form allows you to do, for the two additional years that are still a part of the grant period, you would be able to provide anticipated budgets for those two years. So, if we complete this form and provide that data and say that we take a look at what the main menu looks like when we have finished up this form. As you can see on the main menu, form 1 and form 2 are noted as complete. And as you can see, the remainder of the menu is incomplete and these would be areas we would want to continue to work in. One of the things about the main menu here that I want to point out is you can use this as a management tool to help you complete the application. If you look under the incomplete notes for each of the other sections, it says something underneath it says details. You can click on that and it will take you to the form status check. That will allow you to know what is required in that form at the time, and it will then guide you as to what you need to complete. Use this menu and use the form status checker to help you manage your work as you do it. So what we are going to do, take a look, assess the performance measures.

There are national performance measures that apply to most training programs. And these national performance measures are 7, 8, 9 and 11. In addition to that, training is very unique in MCHB, in that it's at the forefront of developing unique program measures. This is a testament to you. You have in the field have gathered together and met and talked about what is important report for training programs. And these have been developed into program performance measures that in addition to the national ones, you'll have the chance to report on. What we are looking at now, performance measure 7. This is a scale-based measure, it is a measure in which we are going to discuss how, how you complete a scale-based measure in the online system and also take a really good look at this form. When you look at the tracking form and you want to complete it, and you look, well, what do I have here and how do I work this form, there are several things here I want to point out. One is you can, you'll see the title at the top. Right underneath there is a hyperlink, details, allows you to go to the detail sheet. If you are not sure what the measure is about, you can look at the detail sheet. In addition, that will allow you to look at the data collection form for a performance measure. That is the scale-based measure.

This performance measure number 7 is scale-based measure which means you will be scoring yourself each year of the grant on a measure, a data collection form that allows you to, for, for a different number of elements. That will be your support for the measure. In addition throughout the course of the grant you'll be providing objectives for future years. So as you can see here on this form, there is three years of, that you will be able to put objectives. The current year, application, and two additional years. Again, this is a sample. Yours may be very different when you go in, depending on what year you are in for your grant. But what we are looking at here is a good example of reporting future objectives, as well as being able to store yourself for the current year you are in. So what you, you can see, is there is an enter and edit link on the data collection form. What we would do is click on that, in order to score ourselves. Let's move to the next slide. We have just clicked that link, and the data collection form will appear. In this case for performance measure 7, which almost all of you will be completing, there are six elements that you see on the form. And these six you will score yourself.

Score column that has a tick list for each of the elements, score from 0 to 3 on each of the elements. Since you have a possible score of 3 for any one element, and there are 6 of them, the total score for the measure is 18. You cannot go beyond that, only 0 to 3. It's really rather straightforward and easy. Just select each one of these elements and then select a value for it. At the bottom there is a total score, and that is automatically calculated for you. You will also be able to identify whether this data that you are providing at this time is provisional or final. At the time of your progress report, and non-competing continuation, right now as you are scoring you are in the middle of the year. It's not over yet. It will not end until June 30th or May 31st, depending on the period of performance. So it's possible that you do not believe that this is going to be your final score for the year and you could mark it as provisional at this time.

At the end of the year you have the opportunity to come in to finalize this data. It's however you know that this is what your score will be for the year, you can finalize it at this point. Nothing to say you can't change it after the year. But, you would be required to select one or the other provisional or final. You will not be able to save this form unless you identify what the data is. So, what you would do, you would click save, and if we click save and go back, it will take us back to the previous page, and it will show you the score. We had a score of 12, and being displayed in that year. It's automatically brought over from you working and saving the data collection form. As you can also see, I have added objectives into the future. And we anticipate improving, going from a series of 2s to values of 3 in future years of our grant. When these three fields, objective fields of this form and the data collection for the current year are reported, we are finished with our performance measure. We click save, and then it would take us back to the main menu.

What we have in front of us now, we have gone into performance measure number 9. And this is a percentage-based measure. Field-based is what we were looking at, and the other predominant type of measure is the percentage-based measure. Reporting population figure. This requires you in the reporting years to provide a numerator and denominator for that measure, and in addition objective through the courses, the remaining years of the grant. The thing that is important about this to note, if you have any doubt about what the measure is about, you can access the detail sheet at the top that will allow you to read about it and make sure you are reporting correctly. Again, there's a final and provisional button for the data you need to use to identify the nature of the data. This is all you have for percentage-based measure. Percentage-based measures do not have a data collection form, so you will complete your data right on the screen.

Let's move on to the next slide. This gives you an example if we provided data. Now this data is rather, rather large for this measure. But it gives you an idea that you would have a certain population that you have provided the numerator out of a certain population of the denominator and automatically calculates. Again, the objectives here would be under 100%. That would be the uppermost limit for the measure. Move on. I have thrown this one in. We talked about scale-based measures, I threw this in. It's a perform-based measure, one of the ones developed by the program to be used. And these will be available online in the non-competing continuation. So this is a good example of a scale-based measure that the program performance measure. Move on. What we are going to do, we'll take a look at additional data elements for a minute. You look on the side menu, you'll see the training has additional data elements, unique training. When you come into that form you are going to see a series of categories that will look different as the form it appears in the guidance this. Is -- and this is set up so it is hyperlinked.

Take a look at how you enter faculty and staff information. We are going to click on that link; it will take us to the form that's not very impressive. It's pretty, it's rather empty. So what we would end up doing, this is where you would be adding your faculty and staff.

Click on the button that allows you to add faculty. What would happen is that you would have a data entry screen that would pop up. It allows you to provide your faculty information. The required fields are the ones with a red asterisks, and click save, once you click save, go back to this menu, let's go to the next slide. And the faculty member would be added. As you can see, you would continue this process to add as many faculty as you would like, and you need to. Remember, since this is the first year you are using the system, you should add your faculty in right now. Next year when you come back they'll be there and you can add and delete and update at will. But right now it's going to be a blank form that needs to be completely updated. So give yourself time. The training form itself has many areas that require a good deal of data entry.

Let's move on to the next slide. Going to take a look at the long-term training. We are going to click on that one. And like the faculty, it operates in a very similar fashion. Let's click on that. Again, we go to a rather unimpressive form. There's no list at this point of long-term trainees. This would take us to data collection. Able to add the data concerning the trainee, required field on the left in order to save the record, and then you would save the trainee form. And it would pop, pop up under main menu and you would do the trainee there, and add as many trainees as you need. Again, give yourself time to complete this. This is, you are completing a full set of data for the first time in the online, and this allows, just give yourself time. It's going to take time to enter it, the long-term training information. Let's move on. We have just taken a couple, we have taken a look at a couple of the sections. The other ones are more evident where you would be adding certain information concerning continuing education or technical assistance. But this provides you an idea of how to fill out long-term training.

Move on. One of the things I mentioned earlier was about the form status checker. And you can accent -- access that off by clicking on the detail link, or use the side bar which tells you about the form status tracker. When you go there, it's going to look like this. Now, this is what it looks like when everything is done, when you are complete. It will say complete complete complete complete. Otherwise, if it's incomplete, it will say that. And there's a column, an error. It's that column that will give you more information about what needs to be completed, missing budgets for future years on the budget information, for example, or not completed all the feeds in the abstract. Or you don't have objective for your performance measure for years, or if not completed the data collection form for the reporting year. Use this. This is a really helpful device to manage the application. But once everything is fine, that will all show up exactly like it, complete on all the forms. It's only one, this is complete, all the forms are complete that the link back to the main, on the main application page, program specific information is noted as complete. So let's move on to the next slide. This is that main mripx -- application page with the program specific link on it, and program specific information has gone to complete, that only occurs when everything else is done. So now that we have done, Jill, it's back to you. And you can lead us through the end of the final submission.

JILLIAN ROBEY: So now that we are at the status page, we see all sections have been complete. Now we have to submit the application to HRSA. We see at the top of the page it gives you the current status, tells you what the next step would be. It says the forms are complete, suggested next step is submit the application to HRSA. You have the submit to HRSA link at the bottom, click that, and takes you to the page that you have to print, sign and mail the grant application center, gives you the address for the grant application center right there. All the information that you enter throughout the form is pulled into the 6025, so you see there what the page would look like. You also have the option to printout -- print out the forms and the attachments. It will look similar to this. And just go back to the first, or the second slide, please. There are some things I would like to talk about. If you notice on each of the pages, there are several links at the top. We have a home link, we have a glossary, and questions/comments link. If you have any questions about the process or submitting the applications.

Questions/comments link, directly to the HRSA call center and someone will respond to the email or call you back if you prefer, but it will open up a specific form where you can enter if you have a question how to complete something or receive an error or have any difficulties completing the application, you can do that. An email to us. And also call the HRSA call center, rather than spending time trying to figure out something that might be confusing, call us and someone can help you. 877-464-4772, that's the toll free number, also listed throughout the help files and on many of the pages in this section. A lot of the information on the welcome page, there is quite a bit of task, but it is useful to read that. It gives you an understanding what it can be used for. Today we went over the progress report, but there are other things, as well as contact changes you have for yourself or organization eventually will be updated through the external EHB.

LAURA KAVANAGH: All right. Thank you very much for reviewing the system with us. I just want to remind you that don't, if you are stuck on something, don't struggle with it for a prolonged period of time. Call the HRSA call center. They are there to help you. If you have a program question, you can always call the project officer as well. Jillian mentioned the phone number is throughout the online system, also all over the guidance as well, phone number and email address are there. 877-464-4772. Another resource that's available to you, too, is for many of you, your University has submitted online applications to HRSA. Even if, for example, many were completed online. There might be someone already in the University from one of the grants who would be willing to help you. I know some of the informal linkages have occurred already. They have been through the system and are familiar with the system and can assist you there.

I want to repeat the dates I mentioned at the beginning of the broadcast in case you joined us a little later, and then move on to questions and answers. We have been getting a lot of emails and phone calls, when are we going to get the guidance. About the same time frame as we complete it every year. Submitting short-term continuing education applications, continuing education, distance learning, MCH certificate program, graduate medical education, collaborative office rounds, and continuing education, our goal is the guidance is available to you electronically on February 6th. Is that a weekend? February 6th, and due April 8th. These might slide a little bit because of, we don't have the, I was hoping the guidance would be approved by the time we had the broadcast so we could make it available to you. That's the projected time frame. Those of you who submitted long-term grants, pediatric dentistry, social work, adolescent health, leadership education and neurodevelopmental disabilities, or LEND developmental behavioral pediatrics, February 11th. It would be due April 22nd. These dates might shift. We don't have the approved guidance back from HRSA yet, but target date so you know for planning we try and give you as much time as possible to submit your progress report. Now I'm going to turn it over to Madhavi, who will share the questions we have received to date. If you haven't had an opportunity to put in the question yet, please enter it into your desk top and we'll answer them as they come up. Madhavi.

MADHAVI REDDY: Just want to make a couple points to be clear, I know that Laura mentioned it when she talked about submission deadlines, but for two of the programs they do not have progress reports because it was a competition year for them. So, that will relieve some fears. We have gotten calls about that. And also people have emailed saying they have been having problems reading some of the slides. These basically were slides that were, kind of like -- it's taken directly from website pages and made into Power Point slides. So if you are having trouble doing it, and Chris made a great job of condensing the slides down and giving the main points in the presentation. But if you would like to have slides, you can also go to MCHCOM.com and download the slides. And an archive will be available about a week after the presentation at MCHCOM.com, and she will be emailing everyone when the archives are available. So for the first question, we are in our last year of the 2001/2005 grant cycle. Is this the data we will have to, that we will need to supply for reporting progress in our last year of 2004?

LAURA KAVANAGH: One more time.

MADHAVI REDDY: The question is, we are in our last year of the 2001/2005 grant cycle. Is this the data we will need to supply for reporting progress in our last year, 2004?

LAURA KAVANAGH: Yes. For those of you who are entering the fifth year of your grant cycle, you are going to be reporting data from last, the last fiscal year. So July, if long-term training grant, July 1 of 2004 through June 30th projected of 2005. You won't actually be presenting your data for your last year of your grant until you submit a competing application. And then you'll have a five-year progress report to talk about historical data. Hope that answers your question.

MADHAVI REDDY: Next question. Specifically about the Colorado project. Colorado LEND needs to know if we complete a progress report for fiscal year 04-05, since we were not awarded a Lend grant but had a closeout award 2004. So do we submit a report?

LAURA KAVANAGH: Submit a final report. You will not have to submit a progress report through this electronic system. Call Denise and she can walk you through the final report.

MADHAVI REDDY: Next question, everyone listed on the budget need to be registered in the Electronic Handbook system and associated?

LAURA KAVANAGH: No, only the people who are going to be entering data need to be registered users. You can list people in your budget who are not registered users, that's fine, they can appear in the budget if they don't have any responsibilities for adding data into the system. And just to clarify, coming from a University environment, the terminology is administrative official that they use throughout the HRSA Electronic Handbook. That's generally the person of the office-sponsored research or programs. The official person that can sign through the University that it can go forward to HRSA.

MADHAVI REDDY: Do all attachments have to be award file or attached in another file form?

JILLIAN ROBEY: Acceptable are word, excel, and PDF, right now, just because of the way the speech is, the way the different files work. All applications are actually printed out by the grant application center and ensure that they fit 8X11 paper.

MADHAVI REDDY: Will there be an offline area for practice using mock forms?

LAURA KAVANAGH: No. We wish there were. You can go in and register now as soon as, have the physical guidances in front of me. As soon as they are approved the system will be up, I'll notify you via the listserv, but unfortunately all you can do is register in the system. I wish you can go around and play, we did lobby for it, but we were not able to do that.

MADHAVI REDDY: Does the project director have to register before other employees register, or can the other employees go ahead and register now?

JILLIAN ROBEY: The other employees can register before the project director but won't be able to access the grant until the project director registers and then goes in and actually the other employee has to request access to the grant. Then the project director would have to log in, register if they have not done so already, and then grants access to the other employee.

MADHAVI REDDY: Program specific form. Budget form, looks like we are double entering information that we already attached [inaudible]

CHRISTOPHER DYKTON: It's not. Budget consolidate request are a federal request. That is brought over to the program specific information for the budget. What's interesting and important to note is it is a grant request for money coming in for the non-competing -- [inaudible] when you get into the program specific forms, budget forms are much larger. You have the federal request, but then it asks for whatever money you are bringing for the training program. And then it asks across years of the grant, what is the future funding going to look like. Additionally, that money is then broken down to the level of service, type of service provided on the level of the terms, most cases raw infrastructure.

LAURA KAVANAGH: Put it all in infrastructure.

CHRISTOPHER DYKTON: All in infrastructure. So where there is information filled out in the application, it's brought over to the form 1, form 2, and form 4, for your training programs. So you won't be reentering data. You'll be adding it with other statements.

LAURA KAVANAGH: It provides an opportunity for Dr. Van Dike to say -- there could be other grants, foundations, money, variety of different monies. If the University allows you to report in kind contributions, that's where they will be reported as well. It's an issue in some Universities -- the reason why we are asking you these questions, we want to show to congress that you are leveraging the funds dramatically. And initial investment is having a much bigger impact.

MADHAVI REDDY: Will the non-competing continuation menu items be available prior to the guidance being published?

LAURA KAVANAGH: No, I'm sorry, I was hoping it would be published and we could roll it beautifully at this webcast. As soon as it is available you'll receive an email with me with an electronic copy of the guidance and it will be available to you on the Electronic Handbook.

JILLIAN ROBEY: There will be a link that says non-competing continuation and when you click on that it will say there are none currently due. So if you were to register, you would be able to access that.

LAURA KAVANAGH: Right. It's a little misleading. None currently, not today. It will be coming.

MADHAVI REDDY: Program specific data forms when we are reporting data for faculty and staff, are those, is that data only for those included on the budget?

LAURA KAVANAGH: Yes. I think that's right. Yes. I believe it's only the people who you include on the budget that additional data is for, that's correct.

MADHAVI REDDY: Letters [inaudible] should we now be requesting electronic files which may not have the letterhead jpeg?

LAURA KAVANAGH: It's a good question, it's a much bigger question for those submitting application online, the letters are critical, you want the reviewers to see it's letterhead. If you can get it electronically and reference in the letter from so and is agency, we have to work through this over time. There might be a technical fix I don't know about. For the progress, for the non-competing continuation application, you don't have to go out and collect all of those letters again. It's only through a brand-new collaborative activity you want to highlight that you have to worry about the progress report. New applications is why it was built into the system. You want to highlight and provide a letter of support. Did I misspeak about the technical aspects?

JILLIAN ROBEY: If someone calls us at the call center and asks us about the letters of support, we advice them to scan it and include it as either a pdf or award document. Most find that the easiest. When we spoke about how some deal with it, they can't guarantee that anything other than the big page will be associated with the electronic file. Usually what people do, upload an attachment that doesn't have the signature or the letterhead, but clearly stay in the attachment construction that it is available on file at request, and it can be sent during the review process.

LAURA KAVANAGH: If you can scan it, scan it.

MADHAVI REDDY: If I have a question while I'm working on the progress report, who do I contact? Will I be able to speak to a live person?

JILLIAN ROBEY: Yes. Go ahead.

LAURA KAVANAGH: Yes.

JILLIAN ROBEY: Technical, yeah. If you call the call center, we are open from 9:00 to 5:30 eastern time, but we have a voice mail system set up and also email. If you come up with something and you would like to speak to someone about but after the operating hours, send us an email and state you would like to talk to someone and they will call you back. We have many people there answering the phones and you will get through.

LAURA KAVANAGH: I used them, they answer the phones, they are very helpful. Also if it's a program question you can call the project officer, too. The name and phone number will be on the guidance in case you don't have it handy by the telephone.

MADHAVI REDDY: Talking about subcontracts, those institutions submit budget forms, should there be only one total budget form from the primary institution and then a second just listed as a line item as a contract without breakdown of components, the training and non-training?

LAURA KAVANAGH: Only submit one budget to 6025. You will add the summary information about any subcontracts and in your budget justification, you need to provide details. So if there are consultants or whatever the details of the subcontract is, provide whatever the hourly rate, number of hours, or details of that contract. If it's a complex subcontract, you might also want to use an attach -- attachment and add it on as well. You should only submit one budget.

MADHAVI REDDY: In program specific data, trainees, long-term, short-term and intermediate, I think this is from a Lend program, where are we entering it here when we are already entering it -- why isn't this information going to the downloaded, going to be downloaded from yours? We have over 300 trainees a year, and this is a tremendous task.

LAURA KAVANAGH: We are trying to figure out now how to upload information directly into the system. I think, I mean, I don't know where we are with that.

CHRISTOPHER DYKTON: This is a new request, I didn't realize there was training data that is sitting there, but it's something that we can we can explore.

LAURA KAVANAGH: We are trying to make it so you don't have to duplicate data. Meers is a system the Lend grant, a separate system they have been using to enter electronic data. For all the other training programs they don't have a centralized electronic -- a few of them do, LEND does. We are trying to avoid duplicate data entry.

MADHAVI REDDY: Please repeat how you would go from entering performance measure data to the data collection form for that measure.

CHRISTOPHER DYKTON: When you click on your, any of the data of skill-based measures, which would have a data collection form. Go to performance measures data, it will take you to a tracking form that shows you the objectives across the years of that performance measure. As well as the ability to click on a line that says data collection form, and enter or edit. All you have to do is click on that enter or edit link, it will take you to the actual data collection form itself. Complete it, save it, it will take you back to the tracking form where it shows the objectives, as well as the score you just created on the data collection.

LAURA KAVANAGH: To clarify, Chris has been living and breathing these forms for a long time. Performance measure 7 is the family participation, is that right, family participation form. You don't have to memorize it's an 18-point scale. When you click on the form, it will say here are the different measures that you need to score yourself on. That's how you get that.

CHRISTOPHER DYKTON: Yes. And you can always, you know, access the detail sheet and the data collection form if you are like not, you haven't looked at the data collection form that you can enter data in. If you want to look at it and say we need to sit down and talk about this what we want to forecast for ourselves, print it out, sit in a meeting, figure out what your objectives are. On the tracking form, you'll put the objectives, and you'll have the link for the data collection form.

MADHAVI REDDY: Can you clarify about filling in red asterisks versus non-sections? What happens if we attract abstract in the wrong section, will it automatically link to where it's needed?

CHRISTOPHER DYKTON: It won't automatically link because it doesn't know what's in the file that you attach if you attach it in the wrong file. You won't be able to mark a section as complete unless all requirements for that section are met. So if you were to include your project abstract, or the project narrative in the abstract field and tried to proceed through the application, the project description item in the status menu will appear as not complete. So that is corrected. If you ever have any questions about that, you can call us at the call center. Usually that's something that people, you'll see it because it's not complete, and then you'll go to the section and understand, okay, I already attached my descriptions, and probably change it. But unfortunately the system does not know to automatically link it to a different field.

LAURA KAVANAGH: Another thing for your own piece of mind, before you save it as attachment, label it when somebody would recognize when it gets printed out, too. That's added security so you know you intended it to be the project narrative.

MADHAVI REDDY: [Inaudible] asterisk beside it -- [inaudible] what do I do if I initially have my grant not to the authorizing person at the University?

JILLIAN ROBEY: Authorizing official is at the time of application, before that it wasn't collected in the EHB. That could be at the time of the application or report. There won't be anything listed in that authorizing official section, the person would have to register and then you have the option of choosing of all the registered, authorizing officials which one is the correct one. If one is, has already been associated and then has been changed, right now the only way to make that change is by contacting us at the call center, and then they can go in and from the back end, developers go in and make that association. So that's our procedure right now.

LAURA KAVANAGH: Is it possible they could be linked that way if they just submitted, let's say, distance learning application and now coming in for progress report.

CHRISTOPHER DYKTON: Authorizing official varies with every application.

MADHAVI REDDY: Program specific information, what does a PA and the other forms look like? Will individual activities be entered or is this a cumulative?

LAURA KAVANAGH: I'll take that one. These are the same forms, I mean, you saw the hard copy of these in the progress reports from last year, we are asking you to list, either of them it's like the top five or top six and rank which ones you feel are the most important, and then, and provide a cumulative total. Asking for detailed information and then cumulative to see how many did you reach through continuing education. Detailed education on five CE events. Same thing for technical assistance.

MADHAVI REDDY: If we need to enter all faculty names, do we need to add biosketches?

LAURA KAVANAGH: No, only biosketches for new faculty members that you are adding to the grant with the progress report. If you submitted them with the original application, you don't need to deal with those again.

MADHAVI REDDY: Performance measures, are performance measures that are not included in the application meant to be completed prior to initial grant award or non-competing funding?

CHRISTOPHER DYKTON: I think I understand that, but I may need a clarification. At the time of, for new application, you would only be filling out objectives against a grant because you haven't done anything yet, to measure your performance. Once you come into the time of your progress report, you have already started your work, you have already been doing the work. You'll be able to come in and report at least provisionally against the performance measures. That's when you would start actually filling out the data collection form and providing numerators and denominators.

LAURA KAVANAGH: Training programs are a bit unusual in that it's possible you could have successfully competed in multiple cycles and the same type of work years in a row. Most are funded for five years and end. So when you come in with a new application, you don't have a history that you are reporting. You are a little bit unusual, that's why we ask for a progress report from you with your application if you have been funded by us before so you have an opportunity to report on that history of experience with a new application.

CHRISTOPHER DYKTON: One of the things that will help you is on the performance measure tracking forms, there's an instruction at the top about how to place objectives, how to identify provisional or final data. Then one called baseline data. It says that if you have baseline data you would like to talk about, with this performance measure to help interpret what objectives you are outlining for yourself in the future, enter it into a note. And there is a note icon at the top of the page that you can click on and provide background.

MADHAVI REDDY: How do we reflect in kind contributions towards what requires 30% for the project director?

LAURA KAVANAGH: Say that one more time.

MADHAVI REDDY: How do we reflect in kind contributions when grantee needs to document 30% involvement –

LAURA KAVANAGH: In The budget justification, you might only have 10% on the budget form. In the budget justification you have to document that while only 10% is being requested in terms of funding for this grant, 30% time will be spent on this project. Or whatever the percentage is. But as long as it meets that threshold.

MADHAVI REDDY: Why is there not a category for supporting disability data -- [inaudible]

LAURA KAVANAGH: If you would like to report, can they add that?

CHRISTOPHER DYKTON: To the additional.

CHRISTOPHER DYKTON: You need to talk to Jack.

LAURA KAVANAGH: That would be a terrific addition for us to make. That was an oversight.

MADHAVI REDDY: Are the data fields [inaudible] already complete or will they change with the new guidance?

LAURA KAVANAGH: Say that one more time, I'm sorry, I was writing.

MADHAVI REDDY: Are the data fields for extensions for Lend grant already complete or will they change with the new guides?

MADHAVI REDDY: They wouldn't change –

LAURA KAVANAGH: No, I mean, I don't quite understand the question, but for each specific program area like LEND or LEAH or social work, pediatric dentistry, the only ones that will appear are the ones you need to fill out. No forms will appear that you are not required to report on. Nothing will be prepopulated for you because it's the first time you are submitting electronically. If I didn't answer the question, please resubmit it and we'll did our best.

MADHAVI REDDY: Going back to when you are talking about Meers, information be pulled into this report -- [inaudible]

LAURA KAVANAGH: Our goal to pull as much as we can, both from the individual level data and performance measure data. We have had the discussion but we are still working on it.

MADHAVI REDDY: I think this may be from the School of Public Health. We are to include information on the family center approach in the curriculum. Will we be required to report this information in performance measure or will we be exempt?

LAURA KAVANAGH: Madhavi and I have discussed it at length. Where we came out on the measure was that even though the School of Public Health don't have the same clinical interface as other programs do, in terms of family center care, it is important students be exposed to the family-centered approach. We have left the performance measure in and yes, School of Public Health will be required to report on the measure. They had to report on it on the applications this year, but won't be until the progress report a year from now. And we can discuss it further. This is a change from what we had discussed in the past.

MADHAVI REDDY: Can you tell us when to expect the guidance for the competitive LEND application?

LAURA KAVANAGH: For the competitive, not the progress report?

MADHAVI REDDY: No. Cohort B.

LAURA KAVANAGH: Post in the HRSA previews this summer. I can't give you any dates, I have no idea. It will be due in the fall, but I -- the preview will give you the dates.

MADHAVI REDDY: I think Jillian did go over this, how does the project director register?

JILLIAN ROBEY: Everyone registers the same way, through the registration link on the welcome page. But once registered and logged into the system, project director would have to add the grant to his or her portfolio. There's a link there that says grant portfolio, and underneath it it says add to portfolio. Click on that, have the notice of grant awards, notice the grant numbers, the award was issued, and the system validates the name of the project director, and on a previous notice of grant award with the name of the project director that is trying to add the grant to his or her portfolio. Those names don't match, then the system won't let you add the grant to the portfolio, and gives you instructions on how to request that the project director information be changed, if the project director has changed, or just something with a name like, if I had tried to add a grant to my portfolio and my name of Jill instead of Jillian, it won't validate and it will give me instructions on how to fix my name so it will validate with what is on record.

MADHAVI REDDY: Will we still be required to report faculty activity, and if so, can they be attributed to specific staff numbers?

LAURA KAVANAGH: Faculty activities.

MADHAVI REDDY: TA or –

LAURA KAVANAGH: Technical assistance and continuing education will still be reported in aggregate, but in electronic systems they are not attributed to an individual faculty member. If you want to do that, you can did it to a project narrative. Right now in the electronic system, I did this, the title, CE events, who was a target audience, local, national, regional, international, and then totals for all of my CE events. But each individual one is not attributed to a particular faculty member.

MADHAVI REDDY: Okay. Since we are submitting the application electronically, would you like for us to mail a hard copy?

LAURA KAVANAGH: No, I don't think you have to mail a hard copy. When we first did the electronic submissions this fall with new applications, I strongly recommended folks mail a hard copy as well as doing the electronic. Not as much, I mean, it's not such a high anxiety for the progress report where you would lose funding if something got lost in the mail. We'll track it down together if something happens with the electronic submission. This is a learning period. We'll figure it out together. I don't want you to have the extra hassle of having to mail a hard copy as well. I have confidence it will arrive safely electronically. Just make sure the authorizing official is the one who sends it. That's the last link that has to happen for it to be official.

MADHAVI REDDY: Another LEND question, I think you have answered this already, but –

LAURA KAVANAGH: They asked questions earlier on. On.

MADHAVI REDDY: Right. LEND programs competing for new grants July 2006, is it correct a non-competitive progress report is required this year?

LAURA KAVANAGH: Yes, correct. As long as the program is active and you haven't written a new application in that year, you submit a progress report, the year you submit a competing continuation, and for this year the only three categories that have submitted are pediatric pulmonary centers, schools of public health, and new distance learning. Some of you have continuation for distance learning, only those three. If you have any questions, give the project officer a call and they'll let you know.

MADHAVI REDDY: Training data forms, list only the trainees who receive -- [inaudible] or all trainees in the program?

LAURA KAVANAGH: Asking you to submit information about all the trainees in the program, you'll indicate on the form whether or not they receive a stipend but we'll have much better data than we have ever had about total number of trainees touched by the training program and what percentage of them receive a stipend. So both, whether they receive a stipend or not.

MADHAVI REDDY: Okay. Faculty on the application, do we submit biosketches for only faculty listed in the budget.

LAURA KAVANAGH: Just to repeat again, you only need to provide biosketches for new faculty, brand-new to the grant this year. If they were listed last year, you don't need to resubmit biosketches. Something we left available to you in case you have a new faculty member, but normally only going to submit biosketches in a new application. Only if it's a new faculty member who has not appeared on a budget for you before.

MADHAVI REDDY: Okay. This question is for Jillian. If I'm not able to complete the report in one sitting, is it possible to save completed portions and return at a later time?

JILLIAN ROBEY: Yes. Any time you save a page, it saves in the system. A section doesn't even need to be marked as complete if you go in and do, for example, in the detailed budget, if you go in and add personnel and save that page, that section, then the detailed budget section will still appear as not complete. When you log back into the system, that, the information you have entered will be there. So you can log in and out as many times as you need to up until the application is due.

LAURA KAVANAGH: Make sure you save because if you start to enter something and then are pulled away from your desk, and you haven't saved, you will lose that information.

JILLIAN ROBEY: There is a 30-minute timeout on the system. If you don't save or move pages, the system will time you out. Pop-up window comes up and notifies you that you will be timed out in two minutes. With the new Windows, it comes up with pop-up blocker. If you have that enabled, you might want to disable it. But also saving frequently is a good rule of thumb.

MADHAVI REDDY: Okay. What about faculty trainee publications?

LAURA KAVANAGH: We are working, we have a new electronic mechanism for reporting any product that was produced by your grant, that includes referee journal articles, book, book chapters, websites, it's a variety of products. I would be very interested in your feedback on this. Something that several of the programs contributed to the development of this measure, and it will allow us to did a better job of marketing products that you have developed as well. We'll have the URLs for anything, or complete citations. I'm hoping it's an area we will use dramatically, that electronic submission will help improve this process dramatically.

MADHAVI REDDY: Jillian, would you mind repeating the URL?

JILLIAN ROBEY: HTTPS colon slash slash grant dot HRSA dot gov, and any Electronic Handbook link, it's on a lot of pages on the HRSA website.

LAURA KAVANAGH: I will resend the URL when the, when I send out an email with the archives from this broadcast, we'll resend the URL as well. Yes. Put it on the training website as well. Good idea.

MADHAVI REDDY: If you submit provisional data, and we'll need to finalize at the end of the budget year, will we get a remind -- reminder to do this?

LAURA KAVANAGH: Yes, I can send you a reminder.

MADHAVI REDDY: Okay. This one is a big question. Are we able to use Macintosh for this? For the webcast, the main thing is can we use Macintosh for actual submission of the progress reports?

JILLIAN ROBEY: There are known issues with the Macintosh, using Macintosh. What exactly those issues are is a little bit unclear. Some people have been able to work in the system and it just acts a little weird sometimes if you click save the page freezes, but if you click back and save again and it goes through. If you have access to a PC, we highly recommend you use that. We are trying to pin down exactly what is the problem with the

Macintosh. It might be a specific operating version or Internet Explorer being used, but depending what operating system you use and the version of Internet, assess how easy it is to use a Macintosh. But it's not recommended if you have access to a PC.

MADHAVI REDDY: Okay. This question is about -- what if you are a faculty member on a grant and seeker on another grant and fund the project. Can both count as [inaudible] activity? One presentation would be the whole program and the other would be a single presentation.

LAURA KAVANAGH: I'm not following, I'm sorry.

MADHAVI REDDY: Okay. They're talking about activities, this person is a faculty member on an MCH-funded grant but giving a presentation at another one that is not funded. Can they count –

LAURA KAVANAGH: Can you count it twice, no.

MADHAVI REDDY: I'm not sure why they would want to count the first, since they are just a faculty member on the grant.

LAURA KAVANAGH: I generally think, if you are the faculty member affiliated with a training program and you are the one providing the presentation, you are the one who should be counting that as a CE, as a presentation. If that's your question. If you give the same presentation more than once to different audiences you can count it as more than one presentation. But I don't think that was the question. We are trying to cut down on the reporting burden for CE so you only have to have detailed information for the ones you consider the most critical, and then summary data for all of them. We heard a lot of the complaints the data is cumbersome for you to collect over time. We are trying to make it simpler. If you have suggestions on how we can further simplify, I would appreciate it.

MADHAVI REDDY: A faculty, should we enter this on the faculty page?

LAURA KAVANAGH: Yes, you should. Vacancy, list it as a to be hired. They can still, it's not going to require -- it should be to be hired. Because you need to show you will have the funding available if the grant is funded.

MADHAVI REDDY: Looks like that's all the questions that we have.

LAURA KAVANAGH: Thank you so much for participating in this broadcast. Apologize if you don't have the guidance in your hands while we are going through the system. It's not ideal, but as soon as this is approved it will be in your hands. Thank you very much to

Jillian and Chris for taking the time to share your expertise with us. They're available, remember the HRSA call center is available to you. We will be seeing some of you at upcoming grantee meetings. Feel free to ask us additional questions in any form, and call or email your project officer any time with any questions. Thank you very much. Bye-bye.