

# DGIS USER GUIDE

Part 1: User Guide Instructions and DGIS Overview

Version 2.0 – Updated 5/1/2023

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## DGIS OVERVIEW

Originally released in October 2004, the Discretionary Grant Information System (DGIS) is a web-based system that allows grantees to report their data online to the Maternal and Child Health Bureau (MCHB) through HRSA's Electronic Handbooks (EHBs) as part of grant application and performance reporting processes.

DGIS electronically captures data submitted by the approximately 700 discretionary grant awardees each year. Many of these grants are supported under the Title V MCH Block Grant Federal set-aside programs (SPRANS and CISS) and other categorical programs. The DGIS electronically captures performance measures, program-specific information, annual financial data, and abstract data for MCHB's discretionary grants. The DGIS data help to demonstrate the impact of these discretionary grants, assess the effectiveness of these programs, inform programmatic planning, and ensure that quality health-related services are available to the nation's MCH populations. In addition, these data facilitate the alignment between MCHB discretionary programs and the MCH Title V Block Grant program to be able to quantify outcomes across MCHB.

DGIS captures data in the following categories:

**Financial and Demographic Forms:** These forms are completed by all grantees to report financial and demographic information. The forms capture annual budget details, number of individuals served, and project abstracts.

- Measures include: Forms 1-8

**Domain-Specific Measures:** This set of performance measures reflect MCHB's strategic and priority areas. Collectively, they communicate the MCHB "story" to a broad range of stakeholders on the role of MCHB in addressing the needs of MCH populations. Individual grantees respond to a select number of performance measures that are specifically relevant to their program.

- Measures include: Core 1-3, Capacity Building 1-6, Women's/Maternal Health 1-4, Perinatal/Infant Health 1-3, Child Health 1-4, Children with Special Health Care Needs 1-3, Adolescent Health 1-3, Life Course 1-3

**Program-Specific Measures:** These performance measures include specific measures for a select number of programs in order to demonstrate program impact. Only grantees that are a part of these select programs report on these measures.

- Measures include: Training 1-14, Emergency Medical Services for Children 1-9, Healthy Start 1-9, Family-to-Family 1

**Other Data Elements:** These forms include other data requested by MCHB and capture information that grantees are already reporting for program administration and management purposes for certain grant categories. The information highlights unique characteristics of discretionary grant projects that are not captured in the other forms outlined above. Forms capture grantee technical assistance/collaboration, products and publications, and additional workforce development forms.

- Measures include: Technical Assistance/Collaboration; Products, Publications, and Submissions; Faculty and Staff Information; Long Term Trainees; Former Trainees; Medium Term Trainees; Short Term Trainees; Continuing Education; Trainee Follow-Up Survey

Due to the diversity of grant categories administered by MCHB, the grant reporting forms, and performance measure forms appears extensive. However, each grantee only responds to forms that are applicable to their grant, as assigned by Project Officers. In addition, the performance measure forms use a tiered approach in which grantees are able to report the full breadth of their work in increasing levels of detail.

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## DGIS USER GUIDE PURPOSE AND FUNCTION

The purpose of the User Guide is to provide grantees with information, guidance, and instructions for completing DGIS Performance Reports.

NOTE: This instruction manual is intended to primarily provide web system assistance. This manual includes minimal programmatic information and guidance.

# DGIS ACCESS FROM EHBS

## BROWSER REQUIREMENTS

On the [EHBs Login page](#), click on *Browser Requirements* under the *Other Links* section. (EHBs Login page: <https://grants.hrsa.gov/2010/WebEPSExternal/Interface/common/accesscontrol/login.aspx>)

Figure 1: EHBs Login Page

HRSA Electronic Handbooks Support Login

Welcome New User Registration Funding Opportunity What's New Thursday 22<sup>nd</sup> July 2021 03:29:43 P.M.

**!** The next session of the HRSA Healthy Grants Workshop is Tuesday, July 27. To learn more about this free workshop and to register, please visit <https://www.hrsa.gov/grants/manage-your-grant/training/workshops>.

**Existing Users**

Username

Password

Login Forgot Password?

**New Users**

Create an Account

**What's New**

03/26/2020 - Meet Sarah—your new option for automated EHBs Account Management and EHBs site knowledge

Sarah is a new automated intelligent Chatbot tool for managing your EHBs account that can help you with resetting your password, unlocking your account, terminating a logged in ses...[Learn More](#)

03/16/2018 - Optimized Home Page and a New Help Video!

Thanks to your feedback, starting March 16th, you will see a modernized Home Page with new quick links in the Tracking Widget, a streamlined Help Widget, and an overall improved la...[Learn More](#)

[View All](#)

[Click here to get started](#)

**Contact Us**

**Time:** 7:00 a.m. to 8:00 p.m. Eastern Time (ET)  
Monday through Friday

**Phone:** 877-Go4-HRSA/877-464-4772

**Link to contact us:** [click here](#)

**Learn About**

- [Grant Program](#)
- [Free Clinic Program](#)
- [FQHC-LAL Program](#)

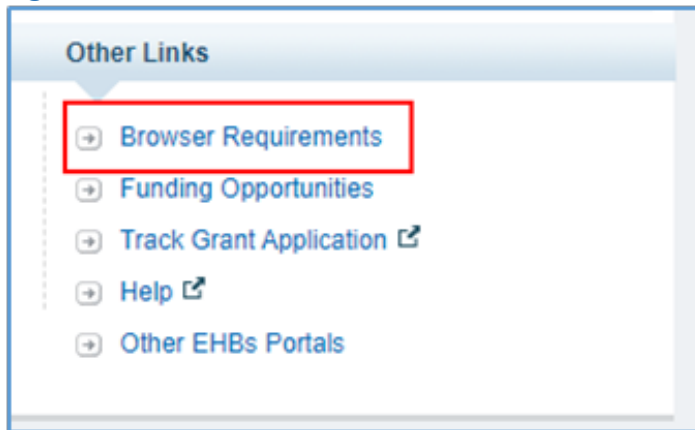
**Other Links**

- [Browser Requirements](#)
- [Funding Opportunities](#)
- [Track Grant Application](#)
- [Help](#)
- [Other EHBs Portals](#)

Accessibility | Viewers And Players | Contact Us

EPS

Figure 2: Other Links



The grantee will land on the **Recommended Settings** page, where the system will automatically scan the system and display the compatibility results of the browser with the recommended settings. Then, the grantee may see the results and update the system's browsers to achieve the best results while using EHBs.

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## RECOMMENDED SETTINGS

System requirements are the hardware and software components that are required for EHBs to operate efficiently. System requirements are listed as minimum requirements and recommended settings. The minimum requirements need to be met for EHBs to run at all, while the recommended settings, if met, will allow HRSA EHBs to run as effectively as possible.

The minimum requirements for EHBs are to use the Microsoft Internet Explorer 11.0 or Mozilla Firefox 3.6 or higher. The screen resolution must be set to 1024 x 768 and above and JavaScript, Cookies and Popup Blocker must be enabled on the browser.

NOTE: Microsoft Internet Explorer (IE) is scheduled to be retired on June 15, 2022. Therefore, it is recommended to discontinue using IE and begin using other freely available browsers such as Microsoft Edge, Google Chrome, or Mozilla Firefox. If the grantees experience any technical difficulties while using the above recommended browsers, please reach out to EHBs Customer Support Center at 877-Go4-HRSA/877-464-4772 or click on the *Link to contact us* available in the *Contact Us* section.

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## ACCESSING DGIS FROM EHBS

1. Log in to EHBS.
2. Click the *Tasks* tab toward the top of the screen.
3. On the left-side menu, under the *Tasks* section, *Pending Tasks* will be selected by default.
4. On the **Pending Tasks** list page, the grantee will see three tabs: *Not Completed* (selected by default); *Recently Completed*; and *Archived*. See Figure 3 below.
5. The *Not Completed* tab lists all the *Pending Tasks* that need attention.
6. Click the *Start/Edit* link under the *Options* column, and the **DGIS Performance Report** page will be displayed. Throughout the duration of your grant *Project Period*, the following three report types will be made available, which are defined below. For more information about the timeline for which reports to expect and when, please see the information below for the three DGIS report types.
7. **New Competing Performance Report (NCPR)**
  - a. This report is available to grantees on the project period start date.
  - b. The report is due within 120 days from the available date.
  - c. The grantee is required to submit the performance details at the beginning of the project period.
8. **Non-Competing Continuation Performance Report (NCCPR)**
  - a. This report is available to grantees on the budget period start date.
  - b. The report is due within 120 days from the available date.
  - c. The grantee is required to submit the performance details on the previous budget period.
9. **Project Period End Report (PPER)**
  - a. This report is available to grantees on the project period end date.
  - b. The report is due within 90 days from the available date.
  - c. The grantee is required to submit the performance details from the previous budget period.

**NOTE:** For the Healthy Start Program, all DGIS performance reports are due within 90 days from the available date.

Figure 3: Pending Tasks - List

The screenshot shows the HRSA Electronic Handbooks interface. The top navigation bar includes 'Home', 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FGHC-LALs', 'Dashboards', and 'Resources'. The 'Tasks' menu is highlighted. Below the navigation bar, the breadcrumb trail reads 'You are here: Home » Tasks » Browse » All Entities'. The main content area is titled 'Pending Tasks - List' and features a filter bar with 'Not Completed', 'Recently Completed', and 'Archived' options. A table displays the following data:

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
07/31/2021 11:59 PM (51 Days)	Grant Submissions		Performance Reports			Edit

## MAIN MENU

The *Main Menu* is the **DGIS Performance Report–Status Overview** page. This is the landing page that appears when accessing the **DGIS Performance Report** from the EHBs. All assigned DGIS forms in the **DGIS Performance Report** are listed on the *Main Menu*. To access a form, click on the corresponding hyperlinked title of the form. The forms are grouped by form type (e.g., *Financial Forms*, *Performance Measures*), and the status of the assigned forms is displayed to the right of each form title. Additional notes about how to navigate this page are listed below:

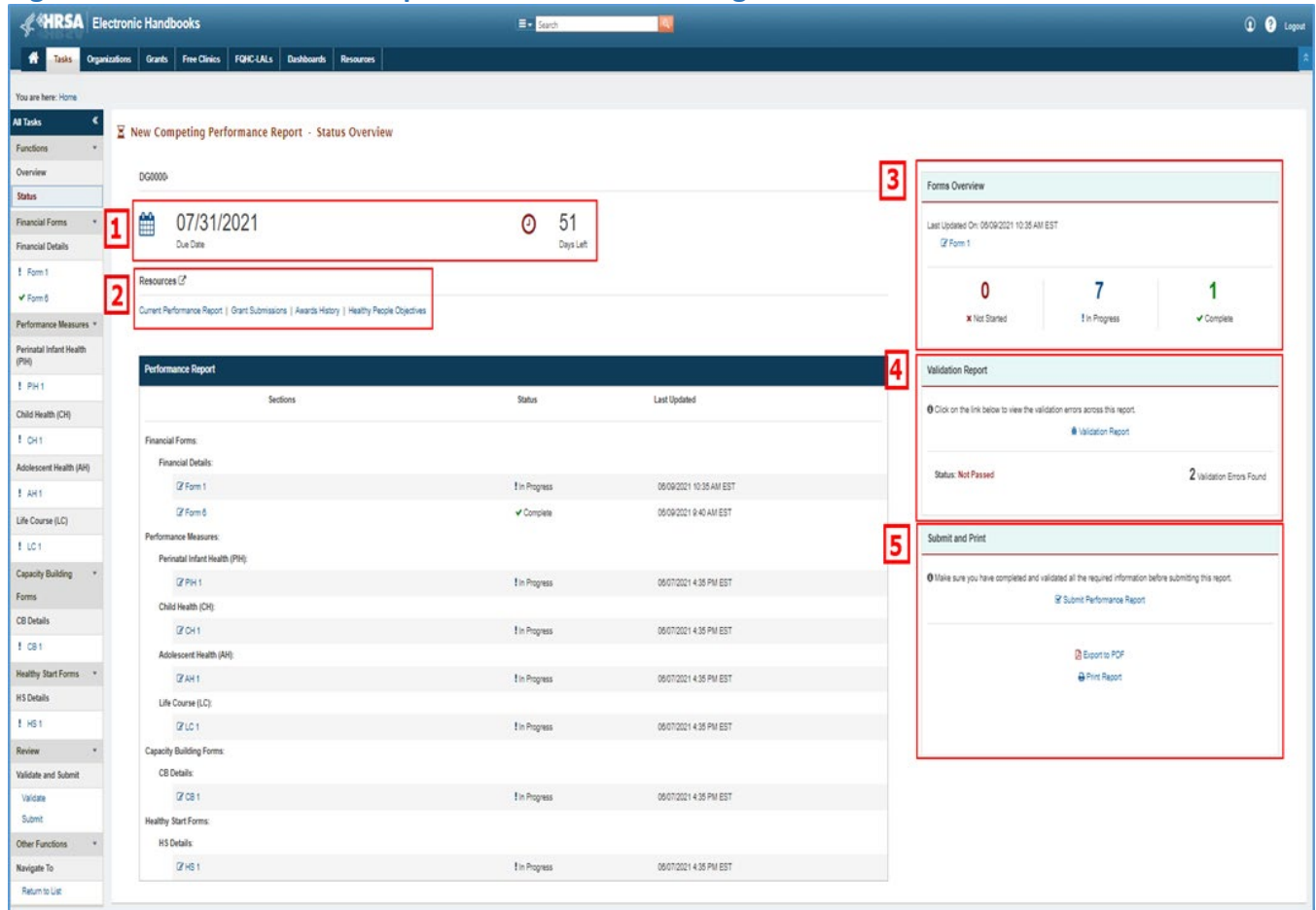
1. The *Due Date* and *Days Left* to complete this report will be shown at the top of the page.
2. The *Resources* section can be used to see the previous performance reports.
3. Under the *Forms Overview* section, the grantee may see the link for the last updated form along with the timestamp. The grantee can track how many forms are under the following statuses:
  - a. *Not Started*: Indicates that a form has not been clicked on or saved.
  - b. *In Progress*: Indicates that a form has been visited and saved at least once.
  - c. *Complete*: Indicates that all sections of the form that have been completed, and all validations have been corrected or addressed by a field-level comment, where applicable. Even if a form is complete, you may still access the form and make any



updates. You may continue to make updates to completed forms until you submit the performance report in the EHBs.

4. The *Validation Report* section displays a list of all errors that must be addressed to complete the forms and the performance report. Click on *Validation Report* to go to the **Validation Report** page and view the errors.
5. On the *Submit and Print* section, the grantee may click on *Submit Performance Report* to go to the **Submit Report–Confirm** page to certify and submit the report. The grantee may also export the report to a PDF file and print the report.

**Figure 4: DGIS Performance Report - Status Overview Page**



## DGIS NAVIGATION

Each form is categorized into different sections identified by the headers on the top of each form (e.g., *Financial Forms*, *Performance Measures*). To make updates to a specific section, navigate to the appropriate section and click on the link to open that form. All the forms can be accessed from the left-side navigation menu. If the menu is not visible, click on the right-side caret icon (>>) to expand it and then all the forms can be accessed from the left-side navigation menu. After completing a section in a form, you may select the *Save* button to save the information or the *Save and Continue* button to save

the information on the current form and navigate to the next form. Select the *Go to Previous Page* button to navigate to the previous page.

**Figure 5: DGIS Performance Report - Status Overview Page**

The screenshot shows the 'New Competing Performance Report - Status Overview' page. The sidebar on the left lists various categories, with 'Financial Forms', 'Performance Measures', 'Capacity Building', and 'Healthy Start Forms' highlighted with red boxes. The main content area features a table titled 'Performance Report' with the following data:

Sections	Status	Last Updated
<b>Financial Forms:</b>		
Financial Details:		
Form 1	In Progress	08/09/2021 10:35 AM EST
Form 6	Complete	08/09/2021 9:40 AM EST
<b>Performance Measures:</b>		
Perinatal Infant Health (PIH):		
PIH 1	In Progress	08/07/2021 4:35 PM EST
Child Health (CH):		
CH 1	In Progress	08/07/2021 4:35 PM EST
Adolescent Health (AH):		
AH 1	In Progress	08/07/2021 4:35 PM EST
Life Course (LC):		
LC 1	In Progress	08/07/2021 4:35 PM EST
<b>Capacity Building Forms:</b>		
CB Details:		
CB 1	In Progress	08/07/2021 4:35 PM EST
<b>Healthy Start Forms:</b>		
HS Details:		
HS 1	In Progress	08/07/2021 4:35 PM EST

Upon adding the information on the last form—e.g., *Healthy Start (HS 1)*—and clicking on the *Save and Continue* button, the system will navigate the user to the **Validation Report** page. If the information added in the forms meets all the requirements, the grantee may submit the report. If there are errors, the **Validation Report** will display the name of the form, the associated error message(s), and a link to navigate to the form.

**Figure 6: Validation Report**

The screenshot shows the 'Validation Report' page for report DG0000. It displays a table with the following data:

Form	Message	Fix in Section
Financial Forms	For Project Budget Details, Grant Award Amount/Enter a number: 1 - 999,999,999	Form 1
Financial Forms	For Project Budget Details, Unobligated Balance/Enter an integer: 0 - 999,999,999	Form 1

Until the errors are fixed, the system will not allow users to submit the report. Only when all the errors are addressed by the grantee will the system allow users to *Submit Reports* and *Confirm*. Once the report has been successfully submitted, the status of the report will change to *Complete*.

### Navigation Buttons:

- The *Go to the Previous Page* button will navigate to the previous page.
- The *Save* button will save the information entered in the form.
- The *Save and Continue* button will save the information on the current form and navigate to the following form.
- The *Return to Status* button will navigate to the **DGIS Performance Report Status—Overview** page. (NOTE: This button will only appear on the **Validation Report** page and **Submit Report – Confirm** page.)

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## SYSTEM TIMEOUTS

As with all the EHB-integrated systems, there is a 30-minute timeout limit. After 30 minutes of inactivity, the system will time you out. The system does not recognize typing as an activity, so please save as you go. To save, you may select from either the *Save* button or *Save and Continue* button.

After 25 minutes of inactivity, a pop-up message will appear asking to *Continue* or *Logout* of the session. The grantee may click on the *Continue* button and extend the session for another 30 minutes or click on the *Logout* button to logout of the session. (NOTE: The pop-up blocker feature must be off to receive this message.)

When done with your session, please make sure to log out of the system by clicking *Logout* in the upper right corner.

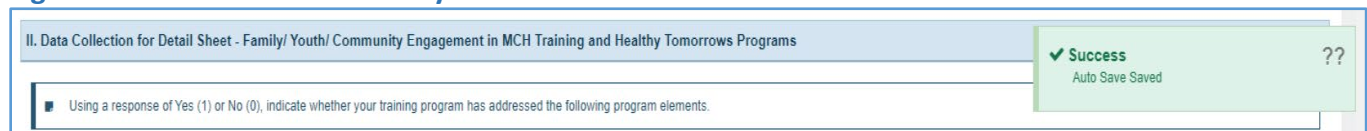
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## AUTO-SAVE

The DGIS system has the auto-save functionality enabled that continually saves data entered into DGIS forms every 9 minutes. If a grantee steps away from their machine or even while continuously entering data in the forms without saving it, the system will keep saving the data after 9 minutes.

NOTE: Although the system automatically saves the data, the best practice is to manually save the data before signing out of the EHBs.

**Figure 7: Auto-Save Functionality**



# FORM LOCKING AND UNLOCKING – PROJECT OFFICER CHANGE REQUEST

If a Project Officer (PO) returns a DGIS report back to a grantee for changes and/or updates, a grantee can update the required information for unlocked forms only.

## LOCKED FORMS

When a form is locked, all the questions are read-only. When the PO selects *Unlock All*, the form and its dependent forms are unlocked.

## UNLOCKED FORMS

Once a form is unlocked and sent to the grantee for revisions, all the fields and questions on that form are unlocked. Any dependent forms are also unlocked. The *Lock All* option will lock the form and its dependent forms on the report. The unlocked forms show as *In Progress* and the locked forms show as *Complete*.

**Figure 8: Unlocked Form**

Sections	Status	Last Updated
<b>Financial Forms:</b>		
<b>Financial Details:</b>		
Form 1	In Progress	06/24/2021 4:54 PM EST
Form 2	In Progress	06/24/2021 4:54 PM EST
Form 3	Complete	06/24/2021 4:54 PM EST
Form 4	Complete	06/24/2021 4:54 PM EST
Form 6	In Progress	06/24/2021 4:54 PM EST
Form 7	Complete	06/24/2021 4:54 PM EST
<b>Performance Measures:</b>		
<b>Perinatal Infant Health (PIH):</b>		
PIH 3	Complete	06/24/2021 4:54 PM EST
<b>Core Forms:</b>		
<b>Core Details:</b>		
Core 2	Complete	06/24/2021 4:54 PM EST
<b>Capacity Building Forms:</b>		
<b>CB Details:</b>		
CB 1	Complete	06/24/2021 4:54 PM EST
CB 4	Complete	06/24/2021 4:54 PM EST
<b>Workforce Forms:</b>		
<b>Workforce Details:</b>		
Publications, Conference and Web-Based Products (Excel upload option)	Complete	06/24/2021 4:54 PM EST
Products and Submissions Data (Manual entry)	In Progress	06/24/2021 4:54 PM EST

## PERFORMANCE REPORT RETURNED TO GRANTEE FOR CHANGES WITH UNLOCKED FORMS

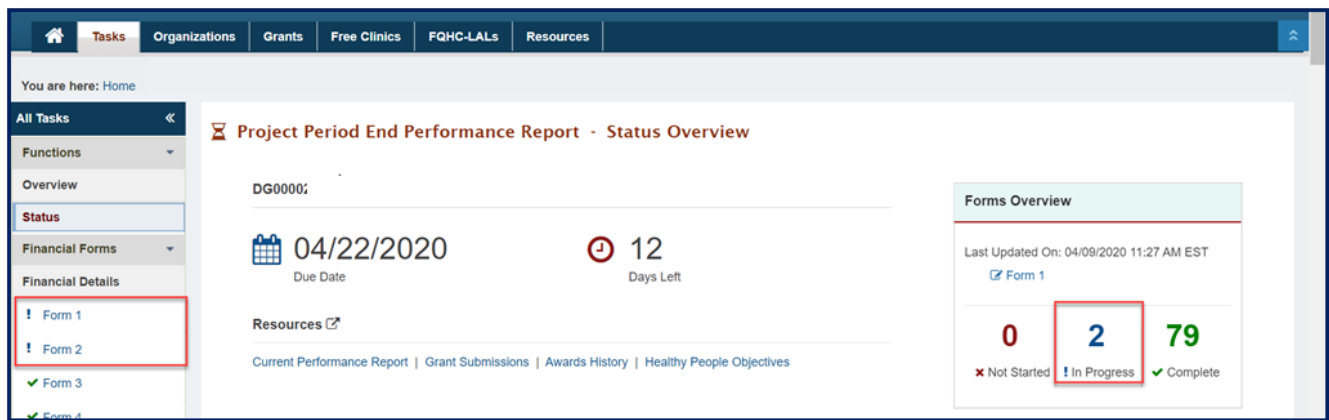
1. The grantee receives their performance report back from the Bureau/PO requesting changes to specific forms.
2. At this time, the status of forms where changes have been requested by the PO will be updated by the system to show as to *In Progress*.
3. The grantee may now access the unlocked forms and make appropriate changes/revisions.
4. The grantee must visit all of the forms whose status is *In Progress*, make the necessary updates, and then click *Save and Continue* to mark the form as complete before resubmitting it for PO review.

## STEPS TO UPDATE AN UNLOCKED FORM

As a prerequisite, PO unlocked forms that require changes are assigned back to the grantee.

1. Log in to EHBs.
2. On the top menu, select the *Tasks* tab to go to the **Pending Tasks–List** page.
3. Find the performance report returned for changes and select *Edit* to go to the **Status Overview** page.
4. The forms unlocked by the PO will be available to the grantee for updates.
5. Example: **Form 1** was unlocked by the PO. Since **Form 2** is dependent on **Form 1**, it has also been unlocked.
6. The status of the unlocked forms will be *In Progress*.

**Figure 9: Performance Report Sent for Changes with Unlocked Forms**



Review all the forms marked as *In Progress* and address the requested changes. After completing the form, select *Save and Close* to mark the unlocked form as *Completed*. After all unlocked forms are marked as completed, navigate to the status page, and select *Submit* from the left menu.

## SCREEN SHARING

The EHBs Screen Sharing feature allows the grantee to share their screen with the HRSA Contact Center, Project Officers (PO), and Grant Management Specialists (GMS) staff to receive assistance with their EHBs related requests.

While the HRSA staff are assisting you over the phone, they may find that a Screen Sharing session will help in addressing your question more efficiently. If that is the case, the HRSA Staff will initiate a screen sharing session and instruct you on how to access the session.

For assistance and detailed instructions on accessing the Screen Sharing session, please refer to the [EHBs Wiki page](#).

**NOTE:** Only HRSA Contact Center, POs, and GMS staff members can initiate a Screen Sharing session.