



# Bureau of Primary Health Care (BPHC)

# Scope Verification: User Guide for Health Centers



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# 1. Introduction

Policy Information Notice (PIN) 2008-01 establishes expectations for the implementation of changes to your scope of project when those changes involve adding or deleting a service or adding or deleting a service site.

The followingchanges to your scope are deemed significant enough to require prior approval from HRSA and once approved, require verification of implementation:

- 1. Adding a service
- 2. Adding a new service site or converting an existing administrative-only site to a service site
- 3. Deleting a service
- 4. Deleting a service site or converting an existing service site to an administrative-only site

For such changes, you are given 120 calendar days to implement the change from the date HRSA releases the Notice of Award (NoA) for Health Center Program grantees or Notice of Look-alike Designation (NLD) for Health Center Program look-alikes . In addition, when you have implemented the change, you must verify this through the HRSA Electronic Handbook (EHB).

The purpose of this user guide is to give detailed instructions for fulfilling the Scope Verification requirement in the EHB.

Note: This user guide is not intended to provide policy guidance. Comprehensive information on scope of project and associated changes is available on the <u>Scope Landing</u> page.

# 2. Significance of the Scope Verification Requirement

HRSA will indicate its decision on a Change in Scope (CIS) request within 60 days of receiving a complete request either by issuing a NoA (for grantees) or NLD (for look-alikes) indicating approval or by sending an e-mail through EHB indicating disapproval. As noted above, HRSA expects health centers to implement approved changes (e.g., open the approved site or begin providing the approved new service) within 120 days of receiving the NoA or NLD approving the change. When HRSA approves the change and releases the NoA or NLD, a Scope Verification Submission is created in your EHB pending tasks. The proposed change is reflected in your scope when the NoA or NLD is released, but the change is flagged as "pending verification" and cannot be selected for any purpose (such as another CIS or program-specific application) until it is verified or the respective Scope Verification Submission expires.<sup>1</sup>

Your health center must verify when they implement the CIS by responding to the Scope Verification submission within the EHB system for HRSA acknowledgement.

- Health centers may submit this Scope Verification upon receipt of the NoA (for grantees) or NLD (for look-alikes) and, when applicable, may select an implementation date as early as the effective date of the approved CIS.
- Once verified, HRSA will issue a new NoA (for grantees) or NLD (for look-alikes) noting the implemented date of the CIS.
- This verification step **MUST** be completed for any addition or deletion of a site or service to be officially documented in the health center's approved scope of project.

<sup>&</sup>lt;sup>1</sup> If a health center determines it is unable to implement the change in 120 days, an extension may be requested via EHB, with approval contingent upon HRSA review and upon the terms and conditions of award (e.g., extensions may not be possible for verifying sites approved through New Access Point awards).



Note: The verification clock only ticks while the Scope Verification Submission is pending with the health center. If you request an extension, the clock stops while HRSA reviews your request. It starts again when HRSA again makes the Scope Verification Submission available to you.

### 3. Completing the Scope Verification Submission in EHB

To complete the Scope Verification submission, log into EHB and access the Scope Verification Submission in your pending tasks. In the Scope Verification Submission, you may either verify that you have implemented the change or you may indicate that you will not implement the change. You will not have the option to propose any new or additional changes. In the case where you will not implement the change, no change is made to your scope.

- If you cannot submit the Scope Verification Submission within the 120-day period because the change has not yet been implemented, you may request an extension of up to 90 days from within the Scope Verification Submission in EHB. Extension requests are subject to review and approval by HRSA. The time HRSA spends reviewing your request will not count against any additional time you may be granted.
- If you do not complete the Scope Verification Submission within 210 (120 plus an approved additional 90) days of the issuance of the NoA or NLD, the submission expires and no change is made to your scope. If you still want to make the change, you will have to submit a new CIS request. If appropriate, you can copy a previously-submitted CIS request and submit it with the necessary revisions.
- New services and service delivery sites become active when you verify their addition; and services and sites that are no longer active are removed as soon as HRSA approves.

Note: if you do not have a username, then you must register in EHB. Do not create duplicate accounts. If you experience login issues or forget your password, contact the BPHC Helpline for assistance at http://www.hrsa.gov/about/contact/bphc.aspx or 1-877-974-2742 (Monday – Friday, 8:30 a.m. - 5:30 p.m. ET).

#### 3.1. Accessing the Scope Verification Submission

- 1. Navigate to the EHB login and enter your login credentials.
- 2. Click the **Tasks** tab.
- 3. Click the **Submissions** link on the left side menu.
- 4. The list of **Submissions Incomplete List** (grantees) or **Not Completed** (LALs) will show as illustrated in Figure 1.
- 5. The **Recently Completed** and **All** tabs display, respectively, recently completed submissions and all completed submissions.



Tasks Orga	nizations G	rants Free Cli	nics FQHC-LALs	Resources							
ou are here: Home » Tasks » Browse » FQHC-LALs [											
ALL TASKS «	🕃 Submi	ssions - Not	Completed								
All Entities	Not Com	pleted Recent	y Completed All								
Tasks											
Pending Tasks								Detaile	d View   Angle S	earch   🔜 Saved S	earches 🔻
FQHC-LALs											
Requests	H I	1 🕨 M 🛛 F	age size: 15 🔻 Go							1 ite	ms in 1 page(
Health Center CIS Requests		Due In	Submission Name	Submission Type	Organization	LAL #	Tracking #	Reporting Period	Deadline	Status	Options
Look-Alike Applications		All 🔻 🍸	Y	All 🔻 🍸	All 🔻 🍸	Y	Y		T	All 🔻 🍸	
Submissions	⊿ Due:	In more than 30 D	ays (1)								
Cubminsions			Scope Verification -	Other				Not	01/13/2018	Not Observed	🕟 Start 🔻
Submissions	•	109 Days	Service Add (Service Name: Optometry)	Submissions		LALCS	SCPV0	Applicable	01/13/2018	Not Started	0

#### Figure 1: Submissions – Not Completed List

### 3.2. Completing the Scope Verification Submission

1. Click **Start** (or **Edit** if already started but not finished) to open the *Scope Verification* submission for service change as shown in Figure 2 or submission for site change as shown in Figure 3.



Scope Verification			
Note(s):			
		The deliverable will expire on 01/13/2018. The last allowable e s will not be updated in your scope of project. If you still inten	extension date is 04/13/2018. I to make the change, then you will have to submit a new CIS request.
SCPV0 :			Submission Status: In Progress
Look-Alike Number: LALCS0 Verification Type: Single		Designation Period: 04/01/2014 - 03/31/2020 Version: 0	Budget Period: 04/01/2017 - 03/31/2018
▼ Resources Ľ			
View CIS Request Related NLD Scope	Verification User Guide		
	Venileation oser Guide		
Fields with * are required Proposed Action - Service - To be Added			
Service Descriptor	Optometry		
Service Delivery Method	Direct:	Formal Written Contract/Agreement:	Formal Written Referral Arrangement: [X]
Scope Verification Decision			
Scope Verification Decision	O Implemented On: (HRSA will be notified that th O Will Not Implement	e implemented by 01/13/2018) () the change is implemented and will review and update your so the proposed change will not be implemented and will review a the is 04/13/2018) ()	
Comments			
Approximately 2 pages ④ (Max 4000 Charan			
Supporting documentation is required for		used actions that will not be implemented.	
<ul> <li>Supporting Documents (Maximum 20)</li> </ul>		No documento attantad	Attach File
		No documents attached	
Go to Pending Tasks List			Save Submit to HRSA

#### Figure 2: Scope Verification Submission for Service Change



Figure 3: Scope	Verification	Submission	for	Site	Change
-----------------	--------------	------------	-----	------	--------

Scope Verification		
02/27/2018. If the Scope Verification then you will have the second sec	complete this Scope Verification deliverable. The deliverable will expire on 11/29/2017. The last allowable extension date is ation deliverable expires, the proposed changes will not be updated in your scope of project. If you still intend to make the change, o submit a new CIS request. is part of a NAP application, you may not request extension.	
SCPV :	Cubmission Status In Deserve	
	Submission Status: In Progres	55
Grant Number: H80 Verification Type: Single	Project Period:         01/01/2016 - 12/31/2018         Budget Period:         01/01/2017 - 12/31/2017           Version:         0	
▼ Resources Ľ		
	A Scope Verification User Guide	
Fields with * are required Proposed Action - Site - To be	Added	
Site Name		
Site Physical Address		
Scope Verification Decision		
	Pending Verification	
	(The proposed action will be implemented by 11/29/2017) ()	
Correction Desision	(HRSA will be notified that the change is implemented and will review and update your scope of project accordingly.) (4)	
Scope Verification Decision	<ul> <li>Will Not Implement</li> <li>(HRSA will be notified that the proposed change will not be implemented and will review and update your scope of project accordingly.)</li> </ul>	
	O Request Extension	
	(The last allowable extension date is 02/27/2018) (i)	
alternate location information	mplement', and an alternate location will be generating patient encounters instead of the proposed site, you should provide the on (e.g., proposed new physical address). Note this information is only for tracking purposes. Please note, you must submit a Add Site), for HRSA review.	
Alternate site address ( if appl	iicable )	
Site Name: N/A		
Site Physical Address: N/A		
Add Update Delete		
Comments		
	4000 Characters): 4000 Characters left.   働/ ¶ 律 律 注 注 B Z 型 Font A T O T 圖 色 梦 링	
C Design Preview		
<ol> <li>Supporting documentation</li> </ol>	is required for requesting extension and for proposed actions that will not be implemented.	
<ul> <li>Supporting Documents (Ma</li> </ul>	Attach	File
	No documents attached	
Close Window	Save Submit to HF	RSA

2. A Scope Verification Decision must be selected. Figure 4 defines each option.



Decision Option	Definition
Pending Verification	Select this option if the site or service addition or deletion has not yet been implemented.
Implemented	Select this option once the addition or deletion of the site or service has been implemented. Provide an implementation date later than or equal to the BPHC Approved Date (if the Scope Verification came from a CIS request) or NoA/NLD Release Date (if the Scope Verification came from an application) and prior to or equal to the current date.
Will Not Implement	Select this option if the addition or deletion of the site or service will not be implemented.
Requesting Extension	Select this option to request up to 90 additional days if you cannot verify the change to your scope within the 120-day verification period. To request additional time, select the decision <i>Request Extension</i> and provide a date later than the current deadline and prior to or equal to the last allowable extension date.
	Note that approval of extensions is contingent upon HRSA review and upon the terms and conditions of award (e.g., extensions may not be possible for verifying sites approved through New Access Point awards).

#### **Figure 4: Scope Verification Decision Options**

- 3. Resources available for your use are:
  - CIS Request displays the CIS Request in read-only mode.
  - Related NoA/NLD displays the NoA/NLD that relates to this Change in Scope.
  - Scope Verification Guide links to this Scope Verification Guide for Health Centers.
- 4. Completing the **Comments** and the **Supporting Documents** sections is optional. However, please note that supporting documentation **is** required if the decision is to not implement or request an extension.

#### 3.3. Submitting the Scope Verification Submission

1. To submit the completed Scope Verification, click the **Submit to HRSA** button at the lower right of the screen (see Figure 5).

#### Figure 5: Submit to HRSA Button

🥜 Lesign 🍬 Preview 🦉	
() Supporting documentation is required for requesting extension and for proposed actions that will not be implemented.	
<ul> <li>Supporting Documents (Maximum 20)</li> </ul>	Attach File
No documents attached	
Go to Pending Tasks List	Save Submit to HRSA

- 2. Once submitted, the *Success* message will appear.
- Note: If you are not ready to submit to HRSA, click the **Save** button to save your work and return to it later.



## 4. Project Officer Requests Change

HRSA may deem it necessary to return your submission for requested changes. In this scenario, follow the steps in Section 3 above to navigate to the **Submissions – List** page and open your submission as you did initially.

In order to view your project officer's reasons for requesting a change, access your EHB-registered e-mail account. Open the respective e-mail and read your project officer's comments.

A Scope Verification may be returned to you more than once based on HRSA's review.

## 5. Copying a CIS Request

In the case where the Scope Verification expires and is no longer available to work on, you can copy any existing CIS request that you have submitted previously. This will be useful under the following circumstances:

- Proposing multiple changes of the same type (e.g., adding multiple services or sites).
- Failing to verify an approved request in time, so you will need to submit a new request that is the same as the original one.

Copying a CIS request makes a duplicate of the original including its attachments. However, data that was entered on the **Change Detail** page and point of contact information that was entered on the **Cover Sheet** page are not copied.

To copy a CIS request (refer to Figure 14), follow these steps:

- 1. Click the **Tasks** tab to navigate to the **Pending Tasks List** page, listing all the available tasks.
- 2. In the left side menu under Grants/FQHC-LAL, click Health Center CIS Requests to navigate to the Change in Scope Request List page.
- 3. Click the **Recently Completed** tab to access all the recently completed submissions and click the **Copy Request** button as shown in Figure 6.

#### Figure 6: Recently Completed - Copy CIS option

Change	e In Scope Red	quest - Lis	st								
Note(s): "Copy Request" feature is available for already submitted CIS Requests only. Once a "Copy Request" is initiated, a new CIS Request will be created. All the information from the Cover Page, Assurance and Change Checklists will be copied over to the new CIS Request.											
) Create N	lew CIS Requests										
Not Comple	eted Recently Co	ompleted	All								
									Detailed V	View   📌 Search   拱 Sa	ved Searches 🔻
K	1 2 3 <b>H</b>	Page size: 1	5 🔻 Go								32 items in 3 page(s)
	Submitted	Date Submitted	Tracking #	Version	Grant #	Grantee Name		Request Type	Submission Status	HRSA Review Status	Options
[	Y		Y		Y		Y				
⊿ Submi	itted: More than 90 d	ays ago									
•	127 days ago	6/7/2017	CIS000	1	H80C:	<b>`</b>		Add an Admin Only Site	Submitted to HRSA	Approved	Copy Request 💌
	187 10 2			Original		1/51 W H % f		Address	Scone Administrator		

4. Click confirm to perform the copy as shown in Figure 7.



#### Figure 7: Confirm Change in Scope Copy

Change in Scope Request Copy - Confirm				
Confirmation:     This is a confirmation page! You MUST click on the appropria	ite button to complete this action.			
▼ CIS000 :'				
Grant Number: H80C Withdrawal Requested: N/A	BHCMIS ID: Created By:	on 5/15/2017 3:28:00 PM	Project Period: 12/1/200 Submitted By:	01 - 12/31/2018 6/7/2017 6:01:37 PM
	50			~
Cancel				Confirm

5. The copied Change in Scope opens as shown in Figure 8. Complete the necessary fields and submit the CIS to HRSA.

#### Figure 8: Copied CIS Opens for Editing

3 Status Overview						
Note(s): Your initial change in scope submission should be completed to the best of your ability on the first submission. Please carefully review and respond to all questions in the CIS checklist. Please note that there will be ONLY THREE additional opportunities to make revisions to this request before it will be disapproved as incomplete or non-responsive. In order to ensure the submission of accurate and up-to-date CIS requests, HRSA will deactivate any requests started but not yet submitted to HRSA when there have been 60 days of inactivity associated with the request in EHB. If you do not access the CIS Request CIS00057452 by 12/11/2017, this CIS Request will be deactivated. If deactivation occurs, you will still be able to view the request CIS00057452 but will have to create and complete a brand new CIS request in order to submit the change in scope for HRSA's consideration.						
▼ CIS000 Original:		Submission Status: In Progress				
Grant Number: H800 Withdrawal Requested: N/A	BHCMIS ID: Created By: on 10/12/2017 5:24:33 PM	Project Period: 12/1/2001 - 12/31/2018 Submitted By: N/A				
Resources C     Current Document     Other     CIS Request     User Guide     Form 5A     Form 5B     Form 5C						
CIS Status						
Section	Status	Options				
CIS Information						
Cover Page	X Not Complete	🤣 Update 🔻				
Assurances	X Not Complete	🕜 Update 🛛 👻				
Change Details	X Not Complete	🤣 Update 🛛 👻				
Change Checklist	X Not Complete	🚱 Update 🔻 👻				
Other Information						
Supporting Documents	X Not Complete	🧭 Update 🔻				

# 6. Help and Support

If you have further questions, please contact the BPHC Helpline. To receive assistance from the BPHC Helpline, please click the following link:

<u>http://www.hrsa.gov/about/contact/bphc.aspx</u> and submit your inquiry. You may also contact the Helpline directly at 1-877-974-BPHC (2742). The BPHC Helpline hours of operation are Monday – Friday 8:30 a.m. – 5:30 p.m. ET. The BPHC Helpline is closed on all Federal holidays.