

# Site Visit Action Plan - Grantee

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Click below for Action Plan Video!



## Related Resources

- [Site Visit Action Plan User Guide](#) - last modified Jan 28, 2021

## Overview

Business processes and mechanisms across HRSA Bureaus and Offices, such as the Corrective Action Plan (CAP) and Performance Improvement Plan (PIP), have been combined to provide one location in the EHBs where HRSA staff can prepare, review and monitor an Action Plan. HRSA Grantees can also prepare an Action Plan for HRSA staff to review and resolve Site Visit findings.

## Requesting the 'Action Plan' Privilege

Members of the grantee organization responsible for preparing the Action Plan must be provided with the 'Action Plan' privilege. Users with the Project Director (PD) role within your grant, should follow the steps below to provide users with the 'Action Plan' privilege:

1. Log in to the EHBs (<https://grants.hrsa.gov/webexternal/login.asp>).
2. Scroll over the **Grants** tab at the top of the page. Select 'View Authorized Users' option from 'Users' section in dropdown list.
3. Locate your organization and click the dropdown arrow next to the **'Registered Users.'** Select 'Manage Users' from the 'Options' column.
4. Locate the user whose privileges you would like to update and click **Update Privileges** under the 'Options' column. (Note: Only users registered to grant will show up in the grant folder.)
5. On the 'User Privileges – Update' page, select the 'Action Plan' privilege and click the **Save and Continue** button to add the selected privilege to the user.

## Preparing Action Plan

1. Log in to the EHBs (<https://grants.hrsa.gov/webexternal/login.asp>).
2. Click the **Tasks** tab at the top of the page. The 'My Tasks – List' page will be displayed.
3. Locate the 'Prepare Action Plan' task and click the **Start** link to navigate to the 'Action Plan – Prepare' page.

### Important Note:

The 'Action Plan Source' section will be prepopulated and you will not be able to edit this section.

4. The 'Finding(s)' section will list all findings within the Action Plan.
5. Click the **Edit** link under the 'Options' column for the finding you would like to update.

6.	<p>You must enter the following information before you can mark the finding as complete:</p> <ul style="list-style-type: none"> <li>• Person(s) Responsible</li> <li>• Due Date.</li> <li>• Intervention/Actions</li> </ul>
7.	Repeat step 5 and 6 until you have entered the information for all findings within the Action Plan.
8.	Once all findings are 'Marked as Complete', click the <b>Submit</b> button to send your Action Plan to HRSA for review.

**Important Note:**

All Findings need to be marked as complete before the Action Plan can be reviewed by HRSA. Once all findings are 'Marked as Complete', click the **Submit** button to send your Action Plan to HRSA for review.

## Resolve Findings within an Action Plan

1.	Log in to the EHBs ( <a href="https://grants.hrsa.gov/webexternal/login.asp">https://grants.hrsa.gov/webexternal/login.asp</a> ).
2.	Click the <b>Tasks</b> tab at the top of the page. The 'My Tasks – List' page will be displayed.
3.	Locate the 'Resolve Action Plan' task and click the <b>Start</b> link.
4.	You will be redirected to a page that shows the list of findings ready to be resolved or worked on.
5.	For each finding, click the <b>Edit</b> link to enter resolution comments in the resolution text box.
6.	While working on a finding, you will have the capability to upload documents in 'Supporting Documents – Grantee' section

## Progress Notes

- You can use the Progress Notes section to track your progress in resolving the Site Visit findings.
- Progress Notes first need to be saved before they can be sent for HRSA review.
- For each saved Progress Note you enter, you can click the '**Send the Progress Note for Review**' link under the 'Options' column to individually send Progress Notes for HRSA review.
- If you would like to send all saved Progress Notes to HRSA in one go, click the '**Send All Progress Notes for Review**' button.

**Important Note:**

You can only send one finding at a time for HRSA to review by selecting the 'Submit' option within each Finding. Once your finding has been submitted, HRSA will be notified that the finding is ready for review and your finding status will change from Pending from "Pending resolution from Grantee" to "Pending resolution from HRSA Staff.{\*}"If you would like to send all saved Progress Notes to HRSA in one go, click the 'Send All Progress Notes for Review' button.

7.	Once all findings have been submitted to HRSA, the 'Resolve Action Plan' task will remain in your queue until HRSA has closed out your Action Plan.
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## Assistance

For more information on the Action Plan or for any EHBs related assistance, contact the HRSA Contact Center by calling Toll Free: (877) Go4-HRSA; (877) 464-4772 or submitting a ticket here: <http://www.hrsa.gov/about/contact/ehbhelp.aspx>