Grants Access and Registration FAQs

Video: How to Add a Grant to Portfolio

Video Below	Audience	Duration
How to Add a Grant to Portfolio	EHBs External Users	5.56 minutes

What is Grant Registration?

To ensure that only authorized individuals from your organization have access to grant-related information and the ability to perform post award activities, HRSA EHBs require all users to explicitly register to one or more grants.

The **Project Director (PD)**, whose name appears on the **Notice of Award (NoA)** is responsible for managing access to non-financial reports for a grant. The **Financial Reporting Administrator (FRA)** is responsible for managing access to financial reports for a grant. This registration process is quick and easy and required only once. The entire registration process can be completed online without intervention from HRSA personnel.

How do I get to the Grants in my Portfolio?

Click the Grants tab at the top of any EHBs page. The **My Grant Portfolio - List** page opens.

How do I find a particular Grant?

1. On the **My Grant Portfolio - List** page, click the **Search** link above the list of grants to open the **Search Filters** section.
2. Enter or select the relevant parameters.
3. Click the **Search** button at the bottom of the section. The **My Grant Portfolio - List** page refreshes, listing the Grants that matched your parameters.

How can I refine the list of Grants that resulted from my Search?

You can use the columns (Grant Number, Organization Name, Budget Period, CRS-EIN, Grant Role, Grant Active, and Last Award Issue Date) to help filter your search.

1. Enter or select a value in one of the filter fields.
2. Click the filter icon (looks like a funnel) next to the field. The list refreshes showing only the items that match the value you entered or selected.
3. If the list is still too long, enter or select a value in another filter.

How can I add a Grant to My Portfolio?

1. On the **My Grant Portfolio - List** page, just below the page title, click the **Add Grant to Portfolio** button.
2. On the **Add Grant to Portfolio** page, select the appropriate Role.
3. Click the **Continue** button at the right edge of the page and proceed.

What roles are available for grant registration?

- **Project Director (PD)**: This is the individual who is most closely tied to programmatic aspects of the grant. The PD's name appears on the Notice of Award (NoA). This person will have all permissions to non-financial submissions for the grant after successful registration and will be responsible for approving grant handbook privileges for other individuals in the organization. Non-financial submissions include performance reports, progress reports, noncompeting continuations, and other submissions.
- **Financial Reporting Administrator (FRA)**: This is the individual who is responsible for financial reporting for grants given to the organization. The FRA is typically the Business Official for the organization and must use the PIN from the Payment Management System (PMS) to register to the grant. The FRA will have all permissions to financial reports for the grant after successful registration and will be responsible for approving privileges to financial reports for other individuals in the organization. The Federal Financial Report (FFR), SF269, is currently the only Financial Report available for submission in the EHBs.
- **Other Employee** (Grant Reporting Support): Other individuals include anyone from the organization, other than the **PD** or **FRA**, who will need access to financial or non-financial submissions for a grant. It includes:
    - Users responsible for assisting in the non-financial post award activities for the grant and who are not the PD: Approval and authorization by the PD are required to access the non-financial grant reports.
    - Users responsible for viewing, editing, or submitting financial reports for a grant, but who do not have the PIN from PMS: Approval and authorization by the FRA are required to access the financial grant reports.

How do I register as a Project Director (PD)?

1. On the **My Grant Portfolio - List** page, just below the page title, click the **Add Grant to Portfolio** button.
2. On the **Add Grant to Portfolio** page, select the **Register as Project Director (PD)** option and then click the **Continue** button. The **Register as Project Director** page opens.
3. In the **Options** column (right-most column on the page), click the Register link for the grant you want to register for.
4. **Register as Project Director** page opens. **Note:** If you are already registered for grant reporting as an employee, the **Change Grant Role** page opens, select the "Yes" checkbox and then click the **Continue** button.
5. Enter the **Award Issue Date** and the **CRS-EIN** for the last award, then click the **Save and Continue** button.

How do I register as a Financial Reporting Administrator (FRA)?

If you are registered as the Authorizing Offcial (AO) or a Business Official (BO), you can use the following steps to register as an FRA.

1. On the **My Grant Portfolio - List** page, just below the page title, click the **Add Grant to Portfolio** button.
2. On the **Add Grant to Portfolio** page, select the **Financial Reporting Administrator (FRA)** option and then click the **Continue** button. The **Financial Reporting Administrator (FRA) - Select Organization** page opens.
3. In the **Options** column (right-most column on the page), click the Register link for the grant you want to register for.
4. Enter the enter the **Account ID** and **PIN** for the last award, and then click the **Save and Continue** button.

How do I request for Grant Access so as to complete a report (e.g. Progress Report, Performance Report, etc)?

1. Click the Grants tab to access your **Grant Portfolio**.
2. Click the **Add Grant to Portfolio** button, select the Request Grant Access option and then click the **Continue** button.
3. You can request access to one or multiple grants -
    a. To request access to a single grant, locate the grant and then click the Request Access link in the **Options** column. The **Grant Access - Request** page opens.
    b. To request access to multiple grants, click in the selection check boxes for the Grants to which you are requesting access, and then click the **Request Access** button at the bottom of the page. The **Grant Access - Request** page opens.
4. In the **Comments** box, enter your reason for requesting access or other relevant information.
5. Select the privileges you are requesting by clicking in the appropriate check boxes.
6. Click the **Request Access** button. The **Grant Access - Request Results** page opens with a "Success" banner.

How do I approve Grant Access Requests as a PD/FRA?

1. On the Tasks tab, select the **Edit** context menu option for the grant access request you want to approve
2. Select the **Approve** context menu option.
   OR
3. On the Tasks tab, click the Review Requests link from the left navigation panel.
4. Select the **Approve** context menu option for the grant access request you want to approve.
5. Select the checkboxes for the privileges you want to assign. The **Grant Access Privileges** page opens.
6. Click the **Approve** button.

Note:

If you want to disapprove the request, select the **Disapprove** context menu option.

How do I view or manage users for my grant?

1. Click the Grants tab to access your Grant Portfolio.
2. Click the Manage Users link for the grant whose users you want to view or manage.
   OR
3. Click the Grants tab to access your Grant Portfolio.
4. Click the Grant Folder link for the grant whose users you want to view or manage.
5. Click the Users link in the left navigation panel.

How do I access my H80 Health Center FTCA program?

1. Click the Grants tab to access your Grant Portfolio
2. Click the Grant Folder link for the grant whose FTCA program you want to access.
3. Click the FTCA Program link in the **Grant Home** page.

How do I access my H80 Approved Scope (Services, Sites, etc)

1. Click the Grants tab to access your Grant Portfolio.
2. Select the respective Services, Sites, or Other Activities and Locations context menu option for the grant whose Approved Scope you want to access.
   OR
3. Click the Grants tab to access your Grant Portfolio.
4. Click the Grant Folder link for the grant whose Approved Scope you want to access.
5. Click the respective (Services, Sites, or Other Activities and Locations) link in the left navigation panel.