

User Guide for Federally Qualified Health Center Look-Alike Program

Instructions for Electronic Submission of Change in Scope Requests

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1. Introduction

1.1. Document Purpose and Scope

The purpose of this document is to provide detailed instructions to help Federally-Qualified Health Center Look-Alikes (FQHC L-A) submit Change in Scope (CIS) requests electronically to BPHC through HRSA Electronic Handbooks (EHBs). The document is intended to be the comprehensive resource for all information related to the electronic processes that BPHC and its FQHC L-As have to follow and will be updated periodically. This document is not meant to replace the Policy Information Notice (PIN) 2009-06: Federally Qualified Health Center Look-Alike Guidelines and Application for CIS requests. FQHC L-As are directed to follow the PIN 2009-06 for all programmatic questions.

1.2. Document Organization and Version Control

This document contains 4 sections in addition to the Introduction. Following is the summary:

Section	Description
Change in Scope (CIS) Process	Provides detailed instructions to existing BPHC FQHC L-As for submitting CIS requests electronically using HRSA EHBs
General Instructions for CIS Application Submission	Provides instructions and important policy guidance on application format requirements
Customer Support Information	Provides contact information to address technical and programmatic questions
Frequently Asked Questions (FAQs)	Provides answers to frequently asked questions by various categories

2. Change in Scope (CIS) Process

2.1. Process Overview

FQHC L-As will use the Change in Scope (CIS) process to request approval for changes to their scope of project. An approved Change in Scope request is needed for any significant change, such as adding or deleting a required service or relocating, opening or closing a service delivery site. For proposed changes that do not require the above mentioned, a controlled CIS is sufficient. Correcting the physical address of a service site is an example of a change that may require nothing more than a controlled CIS request. In addition, FQHC L-As can update certain site-related information directly. No CIS request is needed for this type of change.

Following is the process for submitting a CIS request through the HRSA EHBs:

1. An authorizing official must register with HRSA EHBs (if not already registered) (See 2.2).
2. Read all documentation related to the CIS process including PIN, FAQs and this submission guide.
3. Complete the evaluation questionnaire in HRSA EHBs to determine if a CIS request is needed. This step is optional but recommended before significant time is spent in preparation of the CIS request (See 2.3.2).
4. If a CIS request is necessary, prepare the CIS application through HRSA EHBs (See 2.3.3).
5. Once the CIS request is complete, submit it electronically through the HRSA EHBs (See 2.3.4).

6. HRSA Project Officer (PO) will receive the CIS request and validate it for completeness. If the CIS request is deemed incomplete, HRSA may request a change from the FQHC L-A (See 2.3.5). For controlled CIS requests, HRSA may request that the FQHC L-A submit a formal CIS.
7. When HRSA and CMS have completed the internal processing, the FQHC L-A will receive an email with the review decision. The notification will be sent to the project director and the point of contact for the CIS request.

2.2. Authorizing Official and Other Users Must Register with HRSA EHBs (if not already registered)

In order to submit the CIS request in HRSA EHBs, existing FQHC L-A organization users must register within the EHBs. The purpose of the registration process is to collect consistent information from all users, avoid collection of redundant information and allow for the unique identification of each system user. Note that registration within HRSA EHBs is required only **once for each user. Note that HRSA EHBs allow the user to use his/her single username and associate it with more than one organization.**

Registration within HRSA EHBs is a two-step process. In the first step, individual users from an organization who participate in the grants process must create **individual** system accounts. In the second step, the users must associate themselves with the appropriate FQHC L-A organization. Note that since all existing FQHC L-A organization records already exist within EHBs, there is no need to create a new one.

When creating an individual account, you must choose your role in the grants management process. HRSA EHBs offer the following three functional roles for individuals from applicant/FQHC L-A organizations:

- Authorizing Official (AO),
- Business Official (BO), and
- Other Employee (for project directors, assistant staff, AO designees and others).

For more information on functional responsibilities, refer to the HRSA EHBs online help.

If you have worked on Baseline Scope Verification for your FQHC Look-Alike then you are automatically granted access to work on CIS for your organization. Use the “New/Existing CIS” link under Change Scope on the left side menu on the FQHC L-A Home page to access the CIS Request.

For assistance in registering with HRSA EHBs or/and accessing CIS module, call 877-GO4-HRSA (877-464-4772) between 9:00 am to 5:30 pm ET or email callcenter@hrsa.gov.

2.3. Apply through HRSA EHBs

2.3.1 General Instructions to Use the CIS Function

To access the CIS function, login to HRSA EHBs. Choose “FQHC LA Home” from the HRSA Portal menu on the left side of the page to open the FQHC L-A Home page. On the FQHC L-A Home page, you will see a link on the left navigation menu for “New/Existing CIS”. Click on this link to get to the CIS section of the FQHC L-A handbook. From here, you can edit or view the status of existing CIS requests, as well as create new CIS requests.

2.3.2 Evaluate CIS Need

To ensure that only qualified CIS requests are submitted electronically through the HRSA EHBs, a questionnaire-based wizard is provided to assist FQHC L-As in assessing their CIS need. FQHC L-As are requested to complete this questionnaire each time they proceed to create a CIS

request. Based on the questions answered by the FQHC L-A, the system provides pre-programmed recommendations on whether a CIS request is appropriate or not. Users who complete this questionnaire are expected to discuss the results within their organization or with the project officer as appropriate. The results can be emailed or printed. The results are not saved within HRSA EHBs.

Figure 1: CIS Evaluation Questionnaire Result

1. Addition of a new service delivery site	
2. Addition of a service	
2.1. Will you be providing a new service that is currently provided on-site or through a contract agreement?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Based on your response, CIS is not required.	
3. Relocation of an existing service site	
3.1. Is the service site you are relocating an administrative site?	<input type="radio"/> Yes <input type="radio"/> No

 **This is an optional but recommended step; it has been designed to provide FQHC L-As with guidance before significant time and effort is spent in preparing a CIS request that may not be appropriate to begin with.**

2.3.3 Prepare and Complete CIS Request

Once you have created the CIS request, you must complete it using the built-in system instructions and the instructions provided in the PIN. Depending on the nature of your request for change in scope change, some sections of the CIS request may not be required. The system will advise you when this is the case. You must complete all sections that are required before you can submit the CIS request. Note that you can complete the CIS request in collaboration with other users that have been given privileges to edit a CIS request. You can also edit the CIS request in parts, save it and return to complete it later.

For the sections that have templates to download, refer to section 3.2.2 of this document for further assistance.

For assistance with policy related questions, please contact your HRSA project officer.

 **Your CIS request is considered complete when all sections have been completed as required in the system. Your CIS request must also address all requirements of the PIN. Your CIS request will be subjected to a completeness review by HRSA.**

2.3.4 Submit CIS Request

Once all required sections of the CIS request are complete, it must be submitted to HRSA. Unless the CIS request is submitted, it cannot be considered for review.

The CIS request must be submitted by the Authorizing Official of the FQHC L-A organization or a designee with appropriate authority. The person submitting the CIS request is also required to sign the CIS request electronically.

After successful submission, HRSA EHBs send an email to the project director and the point of contact listed on the CIS request.

 **In order to submit a CIS request, all sections must be complete The CIS request cannot be modified after it has been submitted unless a change is specifically requested by HRSA.**

2.3.5 Follow Up or Request Changes

After your CIS request is submitted to HRSA, it will be reviewed by your project officer. If your CIS request is not complete, the Project Officer (PO) can require that a change be made to your CIS request. There are two ways in which you can find out if a change has been requested:

The first is to monitor the CIS request status on the CIS list page. This status will change to “Change Requested” if the PO has requested a change. You will also see the edit button available to edit your CIS request.

The second method is through email. An email will be sent to your project director and the Point of Contact listed on the CIS request informing that a change has been requested by the PO.

 **You must re-submit the CIS request in order for it to be considered for further review.**

2.3.6 Withdraw CIS Request

After submitting a CIS request, if you wish to withdraw it for any reason, you can choose to do so by submitting the withdrawal request online through the EHBs. Please provide a narrative description along with the withdrawal request. If you have not submitted the CIS request, you can delete it. Deleted requests are permanently removed from the system and cannot be retrieved.

 **Withdrawal requests can be submitted as long as HRSA has not made a decision on the CIS request. The EHBs will prevent a withdrawal request from being submitted if significant processing has already occurred.**

2.3.7 Results

Each submitted CIS request can result in one of the following:

1. Approved – The CIS request has been recommended for approval by HRSA and approved by CMS. You will get an email communicating the approval. Refer to this email for the details of the approval and any remarks.
2. Disapproved – The CIS request has been disapproved by HRSA or CMS. You will get an email stating that the request has been disapproved.
3. Approval Not Required (controlled CIS requests only) – The CIS request has been reviewed within HRSA and it has been determined that your proposed change can be accepted without formal approval.
4. Withdrawn – The CIS request has been withdrawn by HRSA upon request from the FQHC L-A. You will get an email when your CIS request is successfully withdrawn.

You can check the status of your CIS request online within EHBs.

Figure 2: Change in Scope List Page

CIS REQUESTS				Begin New CIS Request	Go
Input Parameters: (hide Details) CIS Tracking Number: All ; CIS Created Date: From (mm/dd/yyyy) All To (mm/dd/yyyy) All ; First Submitted Date: From (mm/dd/yyyy) All To (mm/dd/yyyy) All ; Last Submitted Date: From (mm/dd/yyyy) All To (mm/dd/yyyy) All ; Submission Status IN: All ; Approval Status IN: All ; Withdraw Requested: Both ; Sort By: Tracking Number ; Page Size: 5					
CIS Tracking Number: 00005				Submission Status: In Progress	
LAL Number	LAL3800763				
Project Period	06/01/2002 - 05/31/2006	Number of Revisions	Original		
CIS Request Type	Add Target Population	Created By	Will Kendell on 3/18/2004 5:05:44 PM		
First Submitted By		Last Submitted By			
HRSA Approval Status	Not Started		Withdraw Requested	No	
View: CIS Request Comments Action History					
Action: <input type="button" value="Edit"/> <input type="button" value="Delete"/>					
CIS Tracking Number: 00004				Submission Status: In Progress	
LAL Number	LAL3800763				
Project Period	06/01/2002 - 05/31/2006	Number of Revisions	Original		
CIS Request Type		Created By	Will Kendell on 3/18/2004 5:05:44 PM		
First Submitted By		Last Submitted By			
HRSA Approval Status	Not Started		Withdraw Requested	No	
View: CIS Request Comments Action History					
Action: <input type="button" value="Edit"/> <input type="button" value="Delete"/>					
CIS Tracking Number: 00003				Submission Status: Submitted	
LAL Number	LAL3800763				
Project Period	06/01/2002 - 05/31/2006	Number of Revisions	3		
CIS Request Type	Add a new additional service	Created By	Will Kendell on 12/22/2004 3:22:42 PM		
First Submitted By	Will Kendell on 01/23/2005	Last Submitted By	Will Kendell on 01/23/2005		
HRSA Approval Status	Review In Progress				
View: CIS Request Comments Action History Last Approved Scope					
Action: <input type="button" value="Request Withdrawal"/>					

All CIS requests are maintained in the system. You can search for specific requests over time.

3. General Instructions for Submission

3.1. Cover Page and Assurances

3.1.1 Cover Page

On the CIS Cover Page, you must indicate the type of request you want to submit. The choices map to the actions described in 3.1.2 - 3.1.4.4 below. The choice you make determines the screens you will see when you leave this one. It also determines whether a controlled CIS request is possible.

 **All types of CIS allow changes to one site/services only with exception of “Other PO Notify type self updates”. If you need to request changes to multiple sites/services for CIS types other than “Other PO Notify type self updates”, you must submit a separate CIS request for each change.**

Figure 3: Change in Scope Request Type (CIS Cover Page)

*8. Change in Scope Request Type	
Change Services	
Required Services	
<input type="radio"/>	Add (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., FQHC Look-Alike starts paying for service)
<input type="radio"/>	Delete (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded ONLY on Column III, i.e., FQHC Look-Alike stops paying for service)
<input type="radio"/>	Add missing required service
Additional Services (Existing)	
<input type="radio"/>	Add Additional (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., FQHC Look-Alike starts paying for service)
<input type="radio"/>	Add Specialty (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., FQHC Look-Alike starts paying for service)
<input type="radio"/>	Delete Additional/Specialty (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded ONLY on Column III, i.e., FQHC Look-Alike stops paying for service)
<input type="radio"/>	Remove Additional/Specialty from scope of project
Additional Services (Proposed)	
<input type="radio"/>	Add a new additional service
<input type="radio"/>	Add a new additional specialty service
Change Sites	
Add Service Site	
<input type="radio"/>	New
<input type="radio"/>	Conversion from Admin-Only
Delete Service Site	
<input type="radio"/>	Terminate
<input type="radio"/>	Convert to Admin-Only
Relocate	
<input type="radio"/>	Relocate one approved site to a new location
Target Population	
Add Target Population	
<input checked="" type="radio"/>	Add
Other Changes (Note: Change Impact Analysis and Project Impact Analysis is optional)	
Admin-Only Sites	
<input type="radio"/>	Add
<input type="radio"/>	Delete
Other PO Notify type self updates	
<input type="radio"/>	Update required services
<input type="radio"/>	Update additional services
<input type="radio"/>	Update PO Notify worthy attributes (Form 5B)
<input type="radio"/>	Update activities/other locations (Form 5C)

Click the Save and Continue button when you are done working with the CIS Cover Page.

3.1.2 Change in Scope Request Type: Services, Sites and Target Population

These are changes for which a full CIS is needed. Basically, a CIS request involves one – and only one – of the following:

1. Add a service
2. Delete a service
3. Add a site
4. Delete a site
5. Relocate a site
6. Add target population

All requests for which a CIS is needed fall under one of the above. The table below shows how CIS actions map to the six headings.

Figure 4: Allowable CIS Actions

Service	Add	<ul style="list-style-type: none"> Start paying for a required or additional service Start providing a missing required service Propose an additional service
	Delete	<ul style="list-style-type: none"> Stop paying for a required or additional service Stop providing an existing additional service
Site	Add	<ul style="list-style-type: none"> Add a service site where <ul style="list-style-type: none"> It is a completely new site or It is converted from an existing admin-only site
	Delete	<ul style="list-style-type: none"> Terminate a service site where <ul style="list-style-type: none"> FQHC L-A shuts down the site or FQHC L-A converts the site to admin-only
	Relocate	<ul style="list-style-type: none"> Relocate one approved site to a new location.
Target Population	Add	<ul style="list-style-type: none"> Add Target Population

3.1.3 Change Services

Based on the selection you made on the cover page, you will be taken to screens where you will be able to (1) request changes to an existing required or additional service, (2) request termination of an existing additional service, or (3) propose a new additional service.

The following tables are intended to clarify what is deemed as “adding” and “deleting” required and existing additional services. In each table, the three columns under “From” represent how the boxes in columns 1-3 of Form 5a might be checked originally. The columns under “To” represent how the boxes would be checked as a result of your CIS request. The difference between the two determines whether your CIS request is an “addition” or a “deletion” of a service. (Basically, any time you begin paying for a service is an add; any time you stop paying for a service is a delete.)

Updates to Mode of Service Provision

Deemed Addition of Required service:

Rows 5 thru 11 represent missing required services

ADD	From			To		
1	—	—	X	—	X	—
2	—	—	X	X	—	—
3	—	—	X	X	X	—
4	—	—	X	X	X	X
5	—	—	—	—	—	X
6	—	—	—	—	X	—
7	—	—	—	X	—	—
8	—	—	—	X	X	—
9	—	—	—	—	X	X
10	—	—	—	X	—	X
11	—	—	—	X	X	X

Deemed Addition of Existing Additional Service:

ADD	From			To		
12	—	—	X	—	X	—

13	—	—	X	X	—	—
14	—	—	X	X	X	—
15	—	—	X	X	X	X

Deemed Deletion of Required Services and Deemed Deletion of Existing Additional Services:

DELETE	From			To		
16	X	—	—	—	—	X
17	—	X	—	—	—	X
18	X	X	—	—	—	X
19	X	—	X	—	—	X
20	—	X	X	—	—	X
21	X	X	X	—	—	X

3.1.3.1 Requesting Changes to Existing Services

To request changes to existing required or additional services, or to request termination of existing additional services, you must first choose the service. The Change Details page appears when you leave the CIS Cover Page. Click the Pick From List button to choose a required or additional service.

Figure 5: Choosing a Service

You may work with only one service per CIS request. If you choose the wrong service, or decide that you want to work with a different service, you must first remove the service you originally chose.

Different screens will appear depending on whether you have chosen to work with a required or an additional service. In either case, the steps you take will be more or less the same. Figure 6 shows the update page for a required service. Check/uncheck the boxes as appropriate to indicate changes to the way you provide the service.

Figure 6: Updating a Required Service

Click the Save and Continue button when done.

3.1.3.2 Proposing Additional Services

The Change Details page appears when you leave the CIS Cover Page after indicating that you want to propose adding a new additional service to your scope. Click the Pick From List button.

Figure 7: Adding a Service

The screenshot shows a web interface titled 'CHANGE DETAILS' with a status of 'In Progress'. It features three buttons: 'Pick From List', 'Update', and 'Remove'. At the bottom, there are buttons for 'Go to Previous Page', 'Save', and 'Save and Continue'.

Choose the service to add from the list, and then check the boxes to indicate the way you propose to provide the service.

Figure 8: Choosing a Service to Add

The screenshot shows a form titled 'ADDITIONAL SERVICE' with a 'Choose Service to Add' section. It includes a dropdown menu for 'Choose a Service' and a text input for 'If Other, Specify'. Below this is a table with columns for 'SERVICE TYPE' and 'MODE OF SERVICE PROVISION' (I. Directly by FQHC Look-Alike, II. Formal Written Agreement, III. Informal Referral Arrangement). Each mode has a checkbox. Buttons for 'Cancel' and 'Save and Continue' are at the bottom.

SERVICE TYPE	MODE OF SERVICE PROVISION		
	I. Directly by FQHC Look-Alike	II. Formal Written Agreement (FQHC Look-Alike Pays for service)	III. Informal Referral Arrangement (FQHC Look-Alike DOES NOT pay)
Choose a Service [dropdown]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If Other, Specify [text input]			

Click the Save and Continue button when done.

3.1.4 Change Sites

Based on the selection you made on the cover page, you will be taken to screens where you will be able to (1) add, (2) delete, or (3) relocate sites.

You may work with only one site per CIS request, unless splitting or consolidating service sites. If you choose the wrong site, or decide that you want to work with a different one, you must first remove the site you originally chose.

3.1.4.1 Adding a Site

The following actions constitute adding a site:

1. Adding a new admin/service delivery or pure service site;
2. Converting an existing admin-only site into an admin/service delivery or pure service site.

3.1.4.1.1 Adding a new admin/service delivery or pure service site

The Add Site page appears when you leave the CIS Cover Page after indicating you want to propose adding a site. Click the Add New Site button.

Figure 9: Choosing a Site

The screenshot shows a web interface titled 'CHANGE DETAILS' with a status of 'In Progress'. It features two buttons: 'Pick From List' and 'Add New Site'. At the bottom, there are buttons for 'Go to Previous Page', 'Save', and 'Save and Continue'.

The site you wish to add should already be registered with HRSA. The next screen will show the sites that are registered. Choose the site from the list, and then click the Select This Location button.

Figure 10: Select Performance Site Page

PERFORMANCE SITE		
Select Performance Site		
Select	Name	Address
<input checked="" type="radio"/>	Community Health Center	123 Main Street, Addison, TX 77324-2324
<input type="radio"/>	Fort Blend ISD	16431 Lexington Blvd, Sugar Land, TX 77479-2308

- If the site does not appear in the list, click the Add button to register it. When you return to this screen, select the site and click the Select This Location button.
- If the site appears in the list and you want to change its name, select it and click the Update button. When you return to this screen, select the site and click the Select This Location button.

Complete the questionnaire to verify that the site qualifies under the new PIN 2009-06. Attach a file to justify adding the site. Click the Save and Continue button.

Figure 11: Site Qualification Criteria Page

SERVICE SITE CHECKLIST				
Site Qualification Criteria				
*1. Is the site an "admin-only" site?				
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable				
If 'No',				
a.	Are health center encounters generated by documenting in the patients' records face-to-face contacts between patients and providers?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
b.	Do providers exercise independent judgment in the provision of services to the patient?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
c.	Are services provided directly by or on behalf of the FQHC Look-Alike, whose governing board retains control and authority over the provision of the services at the location?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
d.	Are services provided on a regularly scheduled basis (e.g., daily, weekly, first Thursday of every month)?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Provide justification for adding the site				
File Name	File Size	Date Uploaded	Description	
<input type="button" value="Attach File"/>				

Enter the information for the site.

Figure 12: Update Service Site Information Page

UPDATE SITE		Status: IN PROGRESS
Service Site Information		
*Name of Service Site	Community Health Center	<input type="button" value="Change Site Name"/>
*Service Site Type	Administrative Site	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="checkbox"/> Get from Organization URL <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

Click the Save and Continue button when done.

3.1.4.1.2 Converting an existing admin-only site into an admin/service delivery or pure service site

To propose adding a site, where that site is an existing admin-only site that you are converting into an admin/service delivery site or a pure service delivery site, you must first choose the existing admin-only site from the list of sites in your scope. The Add Site page appears when you leave the CIS Cover Page. Click the Pick From List button to choose the site.

Figure 13: Choose Site to be Added Page

CHANGE DETAILS		Status: In Progress
<div style="border: 1px solid gray; padding: 5px;"> <p>Choose Site to be Added</p> <p>Pick From List Add New Site</p> </div>		
Go to Previous Page	Save	Save and Continue

Choose the site from the list (only eligible sites are selectable, and you can only choose one), and then click the Save and continue button.

Figure 14: Select Site from Scope Page

SELECT SITE FROM SCOPE							
Existing Scope							
Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanna Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124

*This site participated in either an EMC or NAP application in the last fiscal year and is not eligible for selection.

Cancel Save and Continue

Click the Save and Continue button to update the information for the site.

Figure 15: Update Site Page

CHANGE DETAILS					Status: In Progress
Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status	
044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete	
View: Site Details					
Action: Update Site Remove From Application					
<div style="border: 1px solid gray; padding: 5px;"> <p>Choose Site to Terminate</p> <p>Pick From List</p> </div>					
Go to Previous Page				Save	Save and Continue

Click the Update Site link to enter the information for the site.

Figure 16: Changing Service Site Type to Administrative/Service Delivery

UPDATE SITE		Status: IN PROGRESS
Service Site Information		
*Name of Service Site	Community Health Center	<input type="button" value="Change Site Name"/>
*Service Site Type	Administrative Site	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="text"/> <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

You will not be able to change the site's physical address

Click the Save and Continue button when done.

3.1.4.2 Deleting a Site

The following actions constitute deleting a site:

1. Terminating (shutting down) an admin/service delivery or pure service site;
2. Converting an Admin/Service Delivery or Pure Service Site into an Admin-Only Site

3.1.4.2.1 Terminating a Site

To terminate a site, you must first choose the site. The Delete Site page appears when you leave the CIS Cover Page. Click the Pick From List button to choose the site.

Figure 17: Choosing a Site to Terminate

The screenshot shows a web interface titled 'CHANGE DETAILS' with a status of 'In Progress'. Below the title bar, there is a section labeled 'Choose Site to Terminate' which contains a text input field and a 'Pick From List' button. At the bottom of the page, there are buttons for 'Go to Previous Page', 'Save', and 'Save and Continue'.

Choose a site from the list (only eligible sites are selectable, and you can only choose one), and then click the Save and Continue button.

Figure 18: Select Site from Scope Page

The screenshot shows a table titled 'Existing Scope' with the following data:

Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanns Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124

*This site participated in either an EMC or NAP application in the last fiscal year and is not eligible for selection.

Click the Terminate link and then confirm the action on the next screen (not shown).

Figure 19: Terminating a Site

The screenshot shows a web interface titled 'CHANGE DETAILS' with a status of 'In Progress'. It displays a table with the following data:

Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status
044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete

Below the table, there are links for 'View: Site Details' and 'Action: Terminate | Remove From Application'. There is also a 'Choose Site to Terminate' section with a 'Pick From List' button. At the bottom, there are buttons for 'Go to Previous Page', 'Save', and 'Save and Continue'.

Click the Save and Continue button on the confirmation screen when you are done.

3.1.4.2.2 Converting an Admin/Service Delivery or Pure Service Site into an Admin-Only Site

To convert an admin/service delivery or pure service site into an admin-only site, you must first choose the site. The Delete Site page appears when you leave the CIS Cover Page. Click the Pick From List button to choose the site.

Figure 20: Choosing a Site to Convert

CHANGE DETAILS		Status: In Progress
<div style="border: 1px solid gray; padding: 5px;"> <p>Choose Site to Terminate</p> <p style="text-align: center;"><input type="button" value="Pick From List"/></p> </div>		
<input type="button" value="Go to Previous Page"/>	<input type="button" value="Save"/>	<input type="button" value="Save and Continue"/>

Choose a site from the list (only eligible sites are selectable, and you can only choose one), and then click the Save and continue button.

Figure 21: Select Site Page

SELECT SITE FROM SCOPE							
Existing Scope							
Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanna Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124

*This site participated in either an EMC or NAP application in the last fiscal year and is not eligible for selection.

Click the Update Site link.

Figure 22: Terminate Site

CHANGE DETAILS					Status: In Progress
Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status	
044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete	
View: Site Details					
Action: Update Site Remove From Application					
<div style="border: 1px solid gray; padding: 5px;"> <p>Choose Site to Terminate</p> <p style="text-align: center;"><input type="button" value="Pick From List"/></p> </div>					
<input type="button" value="Go to Previous Page"/>				<input type="button" value="Save"/>	<input type="button" value="Save and Continue"/>

Review the site information. Note that the service site type is changed to Administrative.

Figure 23: Changing Service Site Type to Administrative

UPDATE SITE		Status: IN PROGRESS
Service Site Information		
*Name of Service Site	Community Health Center <input type="button" value="Change Site Name"/>	
*Service Site Type	Administrative Site	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="text"/> <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

Click the Save and Continue button when done.

3.1.4.3 Relocating a Site

Relocating a site means moving a single existing site to a new location.

A key concept to bear in mind is that site relocation is a two-part operation – terminating a site at its original location and adding it at its new one.

To relocate a site, you must first choose existing site and terminate it. Then you must add it at its new location.

The Relocate Site page appears when you leave the CIS Cover Page. Under Site to be Relocated (“From” Site), click the Pick From Existing Sites button to choose the site.

Figure 24: Choosing a Site to Move

Choose a site from the list (only eligible sites are selectable, and you can only choose one), and then click the Save and continue button.

Figure 25: Select Site Page

Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanna Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124

Click the Terminate Site link. Confirm the action on the next screen.

Figure 26: Change Site Details Page

The next step is to add the site at its new location. There are two possible scenarios:

1. You are moving services to an existing admin-only site, creating an admin-service delivery site. If this is the case, click on the Pick From Existing Sites button under Site to be Relocated (“To” Site) to choose the admin-only site.
2. You are moving services to a new site. In this case, click on the Add New Site button under Site to be Relocated (“To” Site) to add the site.

Figure 27: Update Service Site Information Page

RELOCATE SITE					
Form 5 - Part B: Proposed Service Sites					Status: NOT COMPLETE
Site to be Relocated ("From" Site)				Allowable Site Actions: (Terminate)	
Site ID	Site Name	Site Location Address (City, State, Zip, CDistrict)	Site Service Type	Your Proposed Action Status	Site Status
08165B	CLINICA CAMPESINA FAM HLTH SVCS	1701 W. 72ND AVE , DENVER, CO 80221-2721	Service Delivery Site	Mark as Terminated	Complete
View: Site Details					
Action: Remove from Application					
Site to be Relocated ("To" Site)				Allowable Site Actions: (Add)	
No Sites Added					
<input type="button" value="Pick from Existing Sites"/> <input type="button" value="Add New Site"/>					
<input type="button" value="Go to Previous Page"/>			<input type="button" value="Save"/> <input type="button" value="Save and Continue"/>		

Our example assumes that you want to move to a new site. Click the Add New Site button.

The site you wish to add should already be registered with HRSA. The next screen will show the sites that are registered. Choose the site from the list, and then click the Select This Location button.

Figure 28: Pre-Registered Performance Sites Page

PERFORMANCE SITE		
Select	Name	Address
<input checked="" type="radio"/>	Community Health Center	123 Main Street, Addison, TX 77324-2324
<input type="radio"/>	Fort Blend ISD	16431 Lexington Blvd, Sugar Land, TX 77479-2308
<input type="button" value="Add"/> <input type="button" value="Update"/>		
<input type="button" value="Cancel"/>		<input type="button" value="Select This Location"/>

- If the site does not appear in the list, click the Add button to register it. When you return to this screen, select the site and click the Select This Location button.
- If the site appears in the list and you want to change its name, select it and click the Update button. When you return to this screen, select the site and click the Select This Location button.

Complete the questionnaire to verify that the site qualifies under the new PIN 2009-06.

Figure 29: Site Qualification Criteria Page

SERVICE SITE CHECKLIST				
Site Qualification Criteria				
*1. Is the site an "admin-only" site?				
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable				
If 'No',				
a.	Are health center encounters generated by documenting in the patients' records face-to-face contacts between patients and providers?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
b.	Do providers exercise independent judgment in the provision of services to the patient?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
c.	Are services provided directly by or on behalf of the FQHC Look-Alike, whose governing board retains control and authority over the provision of the services at the location?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
d.	Are services provided on a regularly scheduled basis (e.g., daily, weekly, first Thursday of every month)?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Provide justification for adding the site				
File Name	File Size	Date Uploaded	Description	
<input type="button" value="Attach File"/>				
<input type="button" value="Cancel"/>		<input type="button" value="Save and Continue"/>		

Click the Save and Continue button to enter the information for the site.

Figure 30: Update Service Site Information Page

UPDATE SITE		Status: IN PROGRESS
Service Site Information		
*Name of Service Site	Community Health Center	
*Service Site Type	Administrative Site	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="checkbox"/> Get from Organization URI <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

Click the Save and Continue button when done.

The Relocate Site page should show that the “Terminate” and “Add” site actions are complete. For any action that is not complete, click the Update Site link for that site. When all actions are complete, the section status (top right-hand corner) will be complete.

Figure 31: Relocate Site Page

CHANGE DETAILS							Status: Complete
Site to be Terminated ("From" Site)					Allowable Site Actions: (Terminate/Change Location)		
Site ID	Site Name	Site Address (City, State, ZipCode)		Service Type	Action Status	Site Status	
044700A	Original	Community Center		Service Delivery	Picked From Scope	Complete	
	Updated	N/A					
View: Site Details Action: Terminate Remove From Application							
<input type="button" value="Pick From List"/>							
Site to be Relocated to ("To" Site)					Allowable Site Actions: (Add)		
Site ID	Site Name	Site Address (City, State, ZipCode)		Service Type	Action Status	Site Status	
N/A	Nursing Home	5461 Grey Dr, Albany, GA, 30314-2131		Service Delivery	Added	Complete	
View: Site Details Action: Update Site Remove From Application							
<input type="button" value="Add New Site"/>							
<input type="button" value="Go to Previous Page"/>					<input type="button" value="Save"/> <input type="button" value="Save and Continue"/>		

 **If you proposed adding a new site at a given address but never actually opened it at that address because of lease issues, you can use the Relocate option to “move” the site to its correct address.**

3.1.4.4 Adding Target Population

FQHC Look-Alikes are required to provide services to a statutorily defined target population; therefore, they must submit a change in scope request in order to add a new target population.

- Migrant Health Center (MHC) Programs;
- Health Care for the Homeless (HCH) Programs;
- Public Housing Primary Care (PHPC) Programs.

 **This CIS request type does not apply to FQHC L-As because these health centers are already expected to serve migratory and seasonal farmworkers, homeless individuals and residents of public housing.**

Select “Add Target Population” on CIS cover page in order to create a request to add target population.

In CIS change details select target population proposed for service .

Figure 32: Target Population Change Details

TARGET POPULATION	
In Progress	
Target Population-Currently being Served	Target Population - Proposed to be Added
Homeless individuals served under HCH Program of section 330(h)	<input checked="" type="radio"/> Migratory and seasonal agricultural farm workers served under MHC Program of section 330 (g) <input type="radio"/> ¹ General medically underserved population served under CH Program of section 330(e) <input type="radio"/> Residents of public housing served under PHPC Program of section 330(i) <input type="radio"/> Homeless individuals served under HCH Program of section 330(h)
<p>Note¹: It is recommend that FQHC Look-Alikes add specific special populations first before considering adding the general medically underserved population served under CH Program of section 330(e) due to the possible significant additional changes resulting from Section 330 compliance considerations.</p>	
Go to Previous Page	Save Save and Continue

Click the Save and Continue button when done.

 **Only one target population type can be added per CIS request.**

CIS Change checklist is different for this type of CIS.

All CIS forms are included in Add Target Population request.

3.1.5 Change in Scope Request Type: Other Changes

These are changes for which nothing more than a controlled CIS may be needed. In preparing the CIS, you may omit the Change Impact Analysis and Project Impact Analysis.

A controlled CIS involves one – and only one – of the following:

1. Add an admin-only site.
2. Delete an admin-only site.
3. Update required or additional services.
4. Update PO Monitored Form 5B attributes.
5. Update Activities/Other Locations (Form 5C).

3.1.5.1 Adding an Admin-Only Site

The Add Site page appears when you leave the CIS Cover Page after indicating you want to propose adding an admin-only site. Click the Add New Site button.

Figure 33: Choosing a Site

ADD SITE	
Form 5 - Part B: Service Sites	Status: NOT COMPLETE
Choose Site to be Added	
No Sites Added	
Add New Site	
Go to Previous Page	Save Save and Continue

The site you wish to add should already be registered with HRSA. The next screen will show the sites that are registered. Choose the site from the list, and then click the Select This Location button.

Figure 34: Pre-Registered Performance Sites Page

PERFORMANCE SITE		
Select Performance Site		
Select	Name	Address
<input checked="" type="radio"/>	Community Health Center	123 Main Street, Addison, TX 77324-2324
<input type="radio"/>	Fort Blend ISD	16431 Lexington Blvd, Sugar Land, TX 77479-2308
<input type="button" value="Add"/> <input type="button" value="Update"/>		
<input type="button" value="Cancel"/>		<input type="button" value="Select This Location"/>

- If the site does not appear in the list, click the Register Performance Site button to register it. When you return to this screen, select the site and click the Select This Location button.
- If the site appears in the list and you want to change its name, select it and click the Update the Registered Performance Site button. When you return to this screen, select the site and click the Select This Location button.

Enter the information for the site.

Figure 35: Update Service Site Information Page

UPDATE SITE		Status: IN PROGRESS
Service Site Information		
*Name of Service Site	Community Health Center	
*Service Site Type	Administrative Site	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="checkbox"/> Get from Organization URL <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

Click the Save and Continue button when done.

3.1.5.2 Deleting an Admin-Only Site

To delete an admin-only site, you must first choose the site. The Delete Site page appears when you leave the CIS Cover Page. Click the Pick From Existing Sites button to choose the site.

Figure 36: Choosing a Site to Terminate

DELETE SITE		Status: NOT COMPLETE
Form 5 - Part B: Proposed Service Sites		
Choose Site to be Terminated		
No Sites Added		
<input type="button" value="Pick from Existing Sites"/>		
<input type="button" value="Go to Previous Page"/>	<input type="button" value="Save"/>	<input type="button" value="Save and Continue"/>

Choose the site from the list (only eligible sites are selectable, and you can only choose one), and then click the Save and Continue button.

Figure 37: Select Site Page

SELECT SITE FROM SCOPE							
Existing Scope							
Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanna Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124

*This site participated in either an EMC or NAP application in the last fiscal year and is not eligible for selection.

Cancel Save and Continue

Click the Terminate Site link and then confirm the action on the next screen.

Figure 38: Terminating a Site

CHANGE DETAILS					Status: In Progress
Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status	
044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete	

View: [Site Details](#)
 Action: [Terminate](#) | [Remove From Application](#)

Choose Site to Terminate

Go to Previous Page Save Save and Continue

Click the Save and Continue button on the confirmation screen when you are done.

3.1.5.3 Updating Required or Additional Services

For required and/or additional services, you can propose changing the mode of service provision so long as the proposed change means you keep paying for the service.

 **For a complete list of allowable updates to required or additional services, refer to the guidance under the Allowable Updates link on the Change in Scope Request Type menu on the CIS Cover Page.**

To request changes to the mode of service provision, you must first choose the service. The Change Details page appears when you leave the CIS Cover Page. Click the Pick From List button to choose a required or additional service.

Figure 39: Choosing a Service

CHANGE DETAILS			Status: NOT COMPLETE
Form 5 - Part A: Required Services Provided			
<input type="button" value="Pick From List"/>	<input type="button" value="Update"/>	<input type="button" value="Remove the service from CIS request"/>	
Go to Previous Page			Save Save and Continue

 **You may work with multiple services in a single CIS request. Choose the services one by one.**

Different screens will appear depending on whether you have chosen to work with a required or an additional service. In either case, the steps you take will be more or less the same. Figure 40 shows the update page for a required service. Check/uncheck the boxes as appropriate to indicate changes to the way you provide the service.

Figure 40: Updating a Required Service

UPDATE REQUIRED SERVICE			
Original Record From Scope			
SERVICE TYPE	MODE OF SERVICE PROVISION		
	I. Directly by FQHC Look-Alike	II. Formal Written Agreement (FQHC Look-Alike Pays for service)	III. Informal Referral Arrangement (FQHC Look-Alike DOES NOT pay)
Diagnostic Laboratory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Update Record			
SERVICE TYPE	MODE OF SERVICE PROVISION		
	I. Directly by FQHC Look-Alike	II. Formal Written Agreement (FQHC Look-Alike Pays for service)	III. Informal Referral Arrangement (FQHC Look-Alike DOES NOT pay)
Diagnostic Laboratory	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Cancel Save and Continue

Click the Save and Continue button when done.

You can propose changes to as many services as you desire. Pick the services and update them one by one.

Figure 41: Updating Multiple Required Services

CHANGE DETAILS							
Form 5 - Part A: Required Services - To be Updated							Status: NOT COMPLETE
Required Service							
SERVICE TYPE	ORIGINAL			UPDATED			STATUS
	I. Directly by FQHC Look-Alike	II. Formal Written Agreement (FQHC Look-Alike Pays for service)	III. Informal Referral Arrangement (FQHC Look-Alike DOES NOT pay)	I. Directly by FQHC Look-Alike	II. Formal Written Agreement (FQHC Look-Alike Pays for service)	III. Informal Referral Arrangement (FQHC Look-Alike DOES NOT pay)	
<input type="radio"/> Diagnostic Laboratory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Updated
<input type="radio"/> Mental Health	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Not Updated

Pick From List

Go to Previous Page Save

Click the Save and Continue button when done.

3.1.5.4 Modifying Update PO Notify Worthy Form 5B Attributes

Certain site-related attributes can be updated with a controlled CIS. A complete list of site-related attributes and the mechanism for updating them can be found under the List of Attributes link on the Change in Scope Request Type menu on the CIS Cover Page.

- “Essential” site attributes can only be changed through a formal CIS. In a formal CIS, you can also update “Monitored Self-update” and “Direct Self-update” site attributes.**
- You can use a controlled CIS to update “Monitored Self Update” site attributes. In a controlled CIS, you can also update “Direct self-update” site attributes.**
- To update only the “Direct Self Update” site attributes, you can use the Direct Self Update through the “Sites” option in the “Approved Scope” menu (See 4.2 below).**

To change site-related details, you must first choose the site from the list of sites in your scope. The Update Site page appears when you leave the CIS Cover Page. Click the Pick From Existing Sites button to choose the site.

Figure 42: Choosing a Site

UPDATE SITE	
Status: NOT COMPLETE	
Choose Site(s) to be Updated	
No Sites Added	
<input type="button" value="Pick from Existing Sites"/>	
Go to Previous Page	Save <input type="button" value="Save and Continue"/>

Choose the site from the list (you can update more than one site, but you can only choose one at a time), and then click the Save and continue button.

Figure 43: Select Site Page

SELECT SITE FROM SCOPE								
Existing Scope								
Select	Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	POC (Name Phone, Email)	Calendar Schedule	Operational Schedule	Total Hours	
<input type="checkbox"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Karen Robbins (301) 937-2455 krobbins@yahoo.com	Year Round	Full-Time	168	
<input type="checkbox"/>	044700H	Drug Intervention Clinic	7881 Jones Ave, Albany, GA, 30315-2130, GA-02	Kim Marker (301) 324-4455 kmarker@yahoo.com	Seasonal	Full-Time	160	
<input type="checkbox"/>	044700I	Clinic for Elderly Care*	6224 Greenbury Hill, Albany, GA, 30315-2130, GA-02	Hanna Rein (301) 247-3665 hrein@yahoo.com	Year Round	Part-Time	124	

*This site participated in either an EMC or NAP application in the last fiscal year and is not eligible for selection.

Cancel Save and Continue

Click the Update Site link to update the information for the site.

Figure 44: Update Site Page

SITES TO BE UPDATED						Status: NOT COMPLETE
Form 5 - Part B: Sites - To be Updated						
Select	Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status	
<input type="radio"/>	044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete	
<input type="radio"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Service Delivery	Not Complete	

Go to Previous Page Save Save and Continue

Enter the information for the site.

Figure 45: Update Screen for PO Monitored Form 5B Attributes

UPDATE SITE		Status: NOT COMPLETE
Form 5 - Part B: Sites - To be Updated		
Service Site Information		
*Name of Service Site	Community Health Center <input type="button" value="Change Site Name"/>	
*Service Site Type	Select Service Site Type	
*Location Type	Permanent	
Number of Contract Service Delivery Locations (Voucher Screening Only)	<input type="text"/>	
Number of Intermittent Sites (Intermittent Only)	<input type="text"/>	
Web URL	<input type="checkbox"/> Get from Organization URL <input type="button" value="Go"/>	
*Site Operated by	<input checked="" type="radio"/> FQHC Look-Alike <input type="radio"/> Sub-recipient <input type="radio"/> Contractor	

You will not be able to change the site's physical address

Click the Save and Continue button when done. You can propose changes to as many sites as you desire. Pick the sites and update them one by one.

Figure 46: Updating Multiple Sites

SITES TO BE UPDATED						Status: NOT COMPLETE
Form 5 - Part B: Sites - To be Updated						
Select	Site ID	Site Name	Site Address (City, State, ZipCode)	Service Type	Site Status	
<input type="radio"/>	044700A	Community Center	5461 Grey Dr, Albany, GA, 30314-2131	Service Delivery	Complete	
<input type="radio"/>	044700G	Toddler Care Facilities	4577 Burke St, Albany, GA, 30314-2131, GA-02	Service Delivery	Not Complete	

Go to Previous Page Save Save and Continue

Click the Save and Continue button when done.

3.1.5.5 Updating Activities/Other Locations (Form 5C)

You can submit a controlled CIS to propose adding activities/locations (Form 5C), or to make changes to existing ones.

3.1.5.5.1 Adding Activities/Other Locations

The Activities/Locations page appears when you leave the CIS Cover Page. Click the Enter Activity/Location button under List of Activities/Locations to be Added.

Figure 47: Adding Activities/Locations

Enter the details. Click the Save and Continue button when done.

Figure 48: Entering an Activity/Location

3.1.5.5.2 Updating/Deleting Existing Activities/Locations

To update or delete existing activities/locations, you must first choose the activity. The Activities/Locations page appears when you leave the CIS Cover Page. Click the Pick from Existing Activities/Locations button under Existing Activities/Locations to be Updated/Deleted.

Figure 49: Picking an Existing Activity for Update

***ACTIVITIES/LOCATIONS**
Form 5 - Part C: Activities/Locations **Status: NOT COMPLETE**

Existing Activities/Locations to be Updated/Deleted

No existing activities/locations have been included in this application.

New Activities/Locations to be Added

Select	Type of Activity	Description of Activity	Type of Location(s) where Activity is Conducted	Activity Action Status
<input type="radio"/>	Home Visits	On occasion, providers make home visits to enrolled health center patients at home and assisted living facilities.	Enrolled patient homes; Local Assisted Living Facilities in CCHS Service Area.	Completed

Choose the activity. Click the Save and Continue button.

Figure 50: Choosing an Existing Activity

SELECT ACTIVITIES FROM SCOPE

Select All | Deselect All

Existing Scope

*Select	Type of Activity	Frequency of Activity	Description of Activity	Type of Location(s) where Activity is Conducted
<input checked="" type="checkbox"/>	Portable Clinical Care	5 - 6 days per week	Provides regular outpatient services, i.e. physicals, immunizations, and other screenings.	The mobile clinic provides services at community health fairs, schools, and community events.

*This activity is already in the current application.

Click the appropriate button to update the activity, mark it for removal from your scope, or remove it from the CIS request (because you don't want to make any changes to it after all).

Figure 51: Updating an Existing Activity

***ACTIVITIES/LOCATIONS**
Form 5 - Part C: Activities/Locations **Status: NOT COMPLETE**

Existing Activities/Locations to be Updated/Deleted

Select	Type of Activity	Description of Activity	Type of Location(s) where Activity is Conducted	Activity Action Status
<input type="radio"/>	Portable Clinical Care	Provides regular outpatient services, i.e. physicals, immunizations, and other screenings.	The mobile clinic provides services at community health fairs, schools, and community events.	Not Changed

New Activities/Locations to be Added

Select	Type of Activity	Description of Activity	Type of Location(s) where Activity is Conducted	Activity Action Status
<input type="radio"/>	Home Visits	On occasion, providers make home visits to enrolled health center patients at home and assisted living facilities.	Enrolled patient homes; Local Assisted Living Facilities in CCHS Service Area.	Completed

Click the Save and Continue button when done.

3.1.6 Assurances

After indicating the type of CIS request and entering the details, you must complete the assurances questionnaire and the appropriate checklist.

3.2. Narrative Attachment Guidelines

3.2.1 Allowable Attachment or Document Types

The following attachment types are supported in HRSA EHBs:

.DOC - Microsoft Word 1997-2003
.DOCX - Microsoft Word 2007
.RTF - Rich Text Format
.TXT - Text
.WPD - Word Perfect Document
.PDF - Adobe Portable Document Format
.XLS - Microsoft Excel

While submitting the narratives for the CIS request, use the templates where provided. Where you are uploading supporting documents, you must attach the documents in one of the formats specified above.

3.2.2 CIS Request Templates

Some sections in the CIS request have templates that must be downloaded, completed and then uploaded to your CIS request. The templates are in Microsoft Word format. When they are downloaded, they will be pre-populated with the grant and CIS request identification information. Save the template to your computer and then enter the required information.

Once you have completed the template you must upload it to your CIS request through HRSA EHBs.

In some cases, you may have to download the template multiple times or copy the template before you make modification. For example if your CIS request relates to multiple sites, you can either download the template multiple times or download it once and make necessary copies.

 **When you save the template it must be in Microsoft Word format. Please ensure that the appropriate file type is selected in the “Save as Type” dropdown box when you save.**

 **It is recommended that you save your CIS attachments using a convenient and easy to remember file naming convention and folder structure on your computer.**

4. FQHC L-A Self-Update

Change in Scope Phase II allows you to view (and, if desired, print) the details of your approved scope. It also affords the capability to update some site-related information directly (i.e., without submitting a CIS request).

4.1. Viewing Your Approved Scope

To access the CIS function, login to HRSA EHBs. Choose “FQHC LA Home” from the HRSA Portal menu on the left side of the page to open the FQHC L-A Home page. Look under “Approved Scope” on the menu on the left side of the page to find links to display the Services, Sites, and Other Activities and Locations in your scope.

4.2. Updating Site Information

It is possible to update some site-related information directly. No CIS request is needed, and changes are made immediately.

Follow the directions in 4.1 above to view site information. For any site, click the Update button to update site details.

Figure 52: Sites in Scope (FQHC L-A Self-Update)

SITES IN SCOPE				
Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	Service Site Type	Site Location Type
BPS-H80-000074	ALTAMED MOBILE VAN	5427 Whittier Blvd , Los Angeles, CA 90022-4101	Service Delivery Site	Mobile Van
View: Details				
Action: <input type="button" value="Update"/>				
Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	Service Site Type	Site Location Type
BPS-H80-000218	ADULT DAY HEALTH CARE CENTER	6210 Whittier Blvd , Los Angeles, CA 90022-4506	Service Delivery Site	Permanent
View: Details				
Action: <input type="button" value="Update"/>				
Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	Service Site Type	Site Location Type
BPS-H80-005748	MOBILE VAN COUNSELING & TESTING	512 S Indiana St , Los Angeles, CA 90063-3911	Service Delivery Site	Mobile Van
View: Details				
Action: <input type="button" value="Update"/>				

The Update Site page displays those attributes that can be updated under **Direct Self Update Attributes**.

Figure 53: Direct Self-Update Attributes (FQHC L-A Self-Update)

Direct Self Update Attributes			
Number of Contract Service Delivery Locations (Voucher Screening Only)	0	Number of Intermittent Sites (Intermittent Only)	0
Web URL		Medicaid Pharmacy Billing Number	
Site Phone Number	323-889-7310	Administration Phone Number	323-889-7300
Site Fax Number		Service Area Population	[_]Urban []Rural
Total Hours of Operation when Patients will be Served per Week (Include extended hours)		Site Mailing Address	-
Medicare Billing Number	in progress	Medicaid Billing Number	in progress
<input type="button" value="Update these Attributes"/>			
Service Area Zipcodes	92707		
<input type="button" value="Update Service Area Zip Codes"/>			
Name of Service Site	AltaMed Medical Group - Santa Ana		
<input type="button" value="Change Site Name"/>			
Service Area Census Tracts	N/A		
<input type="button" value="Update Service Area Census Tracts"/>			

5. Customer Support Information

 Use your CIS Tracking Number for all correspondence.

5.1.1 HRSA Call Center

For assistance with or using HRSA EHBs, call 877-GO4-HRSA (877-464-4772) between 9:00 am to 5:30 pm ET or email callcenter@hrsa.gov.

Please visit HRSA EHBs for online help. Go to:

<https://grants.hrsa.gov/webexternal/home.asp> and click on 'Help'

5.1.2 HRSA Program Support

For assistance with PIN related questions, please contact your project officer.

 **Do not call the project officer for technical questions related to HRSA EHBs.**

6. FAQs

6.1. Software

6.1.1 What are the software requirements for HRSA EHBs?

HRSA EHBs can be accessed over the Internet using Internet Explorer (IE) v5.0 and above and Netscape 4.72 and above. HRSA EHBs are 508 compliant.

IE 6.0 and above is the recommended browser.

HRSA EHBs use pop-up screens to allow users to view or work on multiple screens. Ensure that your browser settings allow for pop-ups.

In addition, to view attachments such as Word and PDF, you will need appropriate viewers.

6.1.2 What are the system requirements for using HRSA EHBs on a Macintosh computer?

Mac users are requested to download the latest version of Netscape for their OS version. It is recommended that Safari v1.2.4 and above or Netscape v7.2 and above be used.

Note that Internet Explorer (IE) for Mac has known issues with SSL and Microsoft is no longer supporting IE for Mac. HRSA EHBs do not work on IE for Mac.

In addition, to view attachments such as Word and PDF, you will need appropriate viewers.

6.1.3 What are the software requirements for submitting CIS requests?

Refer to the software requirements for HRSA EHBs. In addition, you will need Microsoft Word to prepare the narratives and complete other required forms. You can also complete these forms in PDF but Microsoft Word is recommended as you will get the benefit of pre-programmed templates that you can download and use.

6.1.4 How do I download a template?

To download a template, click on the download link next to that template. You will be taken to a warning page with a "Continue" button. Please take special note of the warning; you must save this template as a Microsoft Word document. Once you click on the "Continue" button, a download dialog box will appear; from this dialog box, click on the "Save" button to save this template to your computer. Once the template is saved to your computer you can now complete it and upload it back to your CIS Request.

6.1.5 What if when I open the template, it opens as an HTML page and I cannot edit it?

When downloading or saving a template, you MUST ensure that you are saving it as a Microsoft Word document. You will see this in the "Save as Type" drop down box while saving. If you have already downloaded the template, and it is already in HTML format, then either download the

template again, or close the document and rename the file extension (this is the 3 letters following the “.”) to “doc”.

6.2. Electronic Process

6.2.1 How many CIS requests can I create?

You can create as many CIS requests as necessary for your requirements. However, please discuss each CIS request within your organization and with your HRSA project officer to prevent unnecessary requests from being prepared and submitted.

6.2.2 Can I still submit a CIS request even if the evaluation says I do not need one?

Yes. However, if the evaluation recommends that you do not need a CIS request, please discuss your need to submit a CIS request with your HRSA project officer before submitting a request.

6.2.3 Is there a deadline for submitting CIS requests?

No, there is no deadline when you are preparing and submitting the request for the first time. However, note that if your CIS request is re-opened by the project officer for more information, you should submit the changes within the timeframe requested by the project officer.

6.2.4 Can you list the emails generated from the HRSA EHBs regarding the CIS process? Who receives the emails?

Notification	Subject	Purpose	Sent by	Recipient
Submission of CIS Request	CIS Request Submitted (Tracking No: <trackingnumber>)	The purpose of this email is to notify the FQHC L-A that the CIS request was successfully submitted.	System User	Authorizing Official (AO), Point of Contact (POC), Application Preparer
Change Request by Project Officer	Update CIS Request (Tracking No: <trackingnumber>)	The purpose of this email is to notify the FQHC L-A that the project officer has requested additional information.	Project Officer	AO, POC, Application Preparer
CIS Withdrawn	CIS Request Withdrawn (Tracking No: <trackingnumber>)	The purpose of this email is to notify the FQHC L-A that the CIS request has been successfully withdrawn.	Project Officer	AO, POC, Application Preparer
CIS Deleted	CIS Request Deleted (Tracking No:<trackingnumber>)	The purpose of this email is to notify the FQHC L-A that the CIS request was deleted successfully.	System User	AO, POC, Application Preparer

Notification	Subject	Purpose	Sent by	Recipient
CIS Approved	Approval Notification for Change in Scope Request (Tracking No:<tracking number>)	The purpose of this email is to transmit the CIS decision to FQHC L-A	Project Officer	AO and Business Official
CIS Disapproved	Disapproval Notification for Change in Scope Request (Tracking No:<tracking number>)	The purpose of this email is to notify the FQHC L-A of the disapproval along with justification	Project Officer	AO, POC, Application Preparer