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User Registration and Organization Association

1. Why do I need to register as a user?

The purpose of the registration process is to collect consistent information from all users, avoid collection of redundant information, and uniquely identify each system user. The registration process ensures that only authorized individuals from an organization can view information related to the organization's applications and grants.

2. How do I create an account and register to an organization?

> **IMPORTANT**
> Members of a Free Clinic organization should register to create an account. Registration is required only once. If you have registered before, ***do NOT register again***.
> Contact the **HRSA Contact Center** (CallCenter@hrsa.gov or 877 464-4772 https://help.hrsa.gov/) for assistance with your username and password if you experience problems logging in to the EHBs.

STEP 1: Create a User Account

a. Go to [https://grants.hrsa.gov/webexternal/] and click the **Create an Account** button

b. On the **Registration - Have an Account?** Page, in the **I have never had an account** section, click the **I have never had an account: Create an Account** link.
► Registration instructions will be displayed.

c. Click the **Create Account** button to proceed to the **User Account - Create** page.

d. On the **User Account - Create** page, enter all required information (fields marked with a red asterisk (*****)), then click the **Save and Continue** button.

e. On the **User Account - Create Confirm** page, review the information and click the **Register** button at the bottom of the page, to complete your user account creation.

STEP 2: Register Your Account to an Organization

a. On the **User Account - Register to an Organization** page;
Click the **Free Clinic Number** link, to search for organizations using the Free Clinic Number.
For a new Free Clinic requesting FTCA coverage for the first time, click the **Organization Information** link and search using the listed fields.

b. Enter the required information and click the **Search** button.
► A list of organizations that match your search criteria will open.

c. Click the **Register** link In the **Options** column for the organization to which you want to register.

d. On the **User Account - Select Organization Role** page,
click the check box to select the role that you want to have within the organization.
(Most users have a role of **Other Employee**.)

e. Click the **Save and Continue** button.

> **Note:**
> The Financial Grant Reporting role is not applicable to Free Clinics.

f. When the **Registration Results** page opens, click the **Login to HRSA EHBs** button.
► The **Annual User Acknowledgment** page will open.

g. Read the page, and then click the **Accept** button at the bottom of the page.

3. What are the different roles available for registration?

- **Authorizing Official**:
An Authorizing Official is an individual, named by the applicant organization, who is authorized to act for the applicant and to assume the obligations imposed by the Federal laws, regulations, requirements, and conditions that apply to the Free Clinic.
Use this role if you are a designated authorizing official for your organization.
- **Business Official**:
A Business official is an individual, named by the applicant organization, authorized to review and submit the financial status report and interact with the payment management system.
Use this role if you are a designated business official for your organization.
- **Other**:
All other members of an organization who wish to participate in the electronic process should register using this role.
(HRSA's electronic process allows for additional ***functional roles*** such as Application Preparer, Project Director, and Communication Contact etc.)

4. What role should I use when I'm registering myself?

The roles available for registration are based on the functions associated with applying for, and administering a Free Clinic. Please select the role that best describes your relationship to the Free Clinic.

5. What is the role of the Communication Contact?

The Communication Contact serves as the single point of contact for an organization.

6. **Can multiple people in my organization register under the same role?**

   Yes. However, for each application, only one person can be associated with a given role. For example, there can be multiple **Authorizing Officials** for your organization, but only **one** of them can be listed as the AO for a given application.

   > **Note:**
   > There is no limit to the number of people who can register on behalf of your organization.

7. **Can I represent multiple organizations using the same login information?**

   Yes. The HRSA EHBs now allows you to use the same username and password to represent multiple organizations.

8. **Who do we call if we cannot login?**

   Users can contact the HRSA Contact Center for technical support for the HRSA EHBs, Monday through Friday from 9:00 am to 5:30 pm EST. The contact number is 877-Go4-HRSA (877-464-4772). The email address is callcenter@hrsa.gov.

EHBs Navigation

1. **How do I find my Pending Tasks?**

    a. Log into the EHBs.

    b. Click the **Tasks** tab at the top of the **EHBs Home** page.
    ► The **Pending Tasks - List** page will open.

    c. On the **Not Completed** tab, click the **Search** link above the list of tasks, to open the **Search Filters** section.

    d. Enter or select the relevant parameters, then click the **Search** button at the bottom of the section.
    ► The **Pending Tasks - List** page will refresh, listing the tasks that match your parameters.

2. **There are too many tasks listed. How can I refine the list?**

    You can use the filter fields in the columns (**Due, Deadline, Task Category, Tracking #, Task, Entity, Entity #, and Organization**) to filter your search.

    To perform a search:

    a. Enter or select a value in the filter field of a column.

    b. Click the filter icon (which appears as a funnel) next to the field. The list will refresh so that it will only display those items that match the value you entered or selected.

    c. If the list is still too long, enter or select a value in another filter field.

3. **How can I edit my Pending Tasks?**

    On the **Pending Tasks - List** page, at the right end of the row for the task you wish to edit, click the **Edit** link.
    ► The task will open, and allow you to edit it according to the rules for that type of task.

4. **How do I access my registered organizations?**

    Click the **Organizations** tab to find the organizations to which you are registered. The context menu for each organization allows you to open its corresponding Organization Folder.

5. **How do I register to another organization?**

    a. Click the **Organizations** tab.

    b. Click the **Register to Another Organization** button, and search for the organization to which you want to register.

    c. Click the **Register** link in the context menu for the organization to which you want to register.

    d. Select your **Role** within the organization, then **Save** your work.

6. How do I change my organization's Communication Contact?

a. On the **Organizations** tab, click the **Organization Folder** link for the organization whose contact you want to change.

b. Click the **Users** link in the left navigation panel.

c. Click the **Set as Contact** link in the context menu for the user you want to designate as the Communication Contact.
You can add a ***new*** Communication Contact by clicking the **Add New Communication Contact** button.

7. How do I view or update my organization profile?

On the **Organizations** tab, click the **Organization Profile** link in the context menu for the organization whose profile you want to view or update.

OR

a. On the **Organizations** tab, click the **Organization Folder** link for the organization whose profile you want to view or manage.
b. Click the **Profile** link in the left navigation panel within the organization folder.

Free Clinic Portfolio

1. How do I access My Free Clinic Portfolio?

- Click the Free Clinics tab at the top of the page.
  ►The My Free Clinic Portfolio – List page will open.

2. What is the use of the Free Clinic Portfolio?

- The Free Clinic folder is a place holder for all Free Clinic-related activities.
- Users can create applications, view free clinic-related resources, deeming history, associated NDA, etc.

3. How can I add a Free Clinic to My Portfolio?

a. On the **My Free Clinic Portfolio - List** page, click the **Add Free Clinic to Portfolio** button.

b. On the **Add Free Clinic to My Portfolio** page, select the appropriate role.

c. Click the **Continue** button to proceed.

4. How do I register as a Project Director for a Free Clinic?

a. On the **Add Free Clinic to My Portfolio** page, select the **Register as Project Director** option, then click the **Continue** button.
► The **Register as Project Director – Select Free Clinic** Page will open.

b. In the **Options** column, click the **Register** link for the Free Clinic to which you want to register.

c. Enter the **Free Clinic Number,** then click the **Save and Continue** button.

5. How do I register as 'Other' for a Free Clinic?

a. On the **Add Free Clinic to My Portfolio** page, select the **Register as Other** option, then click the **Continue** button.
► The **Register as Other – Select Free Clinic** page will open.

b. In the **Options** column, click the **Register** link for the Free Clinic to which you want to register.

c. Enter the Free Clinic Number, then click the **Save and Continue** button.

6. How many Project Directors can be registered for a Free Clinic?
A Free Clinic can have only ***one*** Project Director registered.

7. How do I view registered users for my Free Clinic Portfolio?

a. Click the **Free Clinics** tab to access your Free Clinic Portfolio.

b. Click the **Free Clinic Folder** link for the Free Clinic whose users you want to view or manage.

c. Click the View List link under the Users heading, in the left navigation panel.

Free Clinic Application Creation and Access

1. What are the different application types?

There are 3 application types:

- **Initial Deeming** application
- **Redeeming** application
- **Supplemental** application

2. How do I create an Initial Deeming application?

a. Click the **Organizations** tab.

b. On the **My Registered Organizations - List** page, click the **Organization Folder** link to view the **Organization Home** page

> **Note:**
> If you do not find your Organization Folder, click the **Add Organization to your Portfolio** button.

c. On the **Organization Home** page, scroll down to Free Clinic, and under **Free Clinic – Requests**, click the **Create Application** link.

d. Select the **Initial Deeming** option, and click the **Continue** button to create an Initial Deeming application.

3. How do I create a Redeeming application within the Free Clinic Folder?

a. Click the **Free Clinics** tab.

b. On the **Free Clinic - Portfolio** page, click the **Free Clinic Folder** link to view the **Free Clinic Home** page.

> **Note:**
> If you do not find your Free Clinic Folder, click the **Add Free Clinic to your Portfolio** button.

c. On the **Free Clinic Home** page, under **Free Clinic – Requests**, click **Create Application link**.

d. Select the **Redeeming** option, and click the **Continue** button to create a Redeeming application.

4. How many Redeeming applications can be created for a Free Clinic?

- You will ***not*** be able to create more than one redeeming application for each calendar year.
- If you already have an application in progress (or one under review by HRSA), the system will display an error message, and stop the process.

5. How do I create a Supplemental application within the Free Clinic Folder?

a. Click the **Free Clinics** tab.
b. On the **Free Clinic - Portfolio** page, click the **Free Clinic Folder** link to view the **Free Clinic Home** page.

> **Note:**
> If you do not find your Free Clinic Folder, click the **Add Free Clinic to your Portfolio** button.

c. On the **Free Clinic Home** page, under **Free Clinic – Requests**, click the **Create Application** link.
d. Select the **Supplemental** option, and click the **Continue** button to create a Supplemental application.

6. How many Supplemental applications can be created for a Free Clinic?

You can create more than one Supplemental application for a Free Clinic.

7. How do I edit an existing application?

a. Click the **Tasks** tab at the top of the **EHBs Home** page.
► All the applications and submissions you are currently working on will be displayed here.

b. Click the **Edit** link in the context menu for the application that you want to edit.

OR

a. Click the **Tasks** tab at the top of the **EHBs Home** page.

b. Click the **Free Clinic** link in the left navigation panel.

c. Choose **Applications** under **Requests,** to load the **Applications Not Completed - List** page.
► All existing applications with a status of **In Progress** will be listed.

d. Click the **Edit** link in the context menu for the application that you want to access.

8. How do I access a submitted application?

a. Click the **Tasks** tab at the top of the **EHBs Home** page.

b. Click the **Free Clinic** link in the left navigation panel.

c. Click the **Applications** link under the **Requests** heading**,** in the left navigation panel.

d. Click the **Recently Completed** sub tab or the **All** tab, and search for the application.

Free Clinic Application Forms

1. How do I navigate within an application?

- Navigation within the FTCA application reflects the conventions used within the EHBs. The navigation is designed to facilitate data entry by streamlining the flow of pages.
- All the pages in an application can be accessed through the left navigation panel.
- There are **Save**, **Save and Continue,** and **Continue** buttons within an application.
    - Clicking **Save** will save the data and allow you to stay on the current page.
    - Clicking **Save and Continue** will save the data and take you to the next page in the application.
    - Clicking **Continue**, will take you to the next page in the application.

> ⚠ **Note:**
> You can click the **Save** button at any time, to save the data you entered on the current page. If data entry is incomplete, the system will display error message(s). Fix the issues reflected in the error message(s) and continue data entry.

2. What is the Free Clinics Status – Overview page in an application?

- The **Free Clinics Status – Overview** page displays the completion status of each section of the FTCA Free Clinic application.
- The **Free Clinics Status** table within the **Free Clinics Status – Overview** page lists all the forms included in the application. The completion status is displayed on the right. Click the **Update** link, under **Action**, to open the corresponding form for editing.

3. What are the different section statuses in an application, and what do they mean?
There are 3 different completion statuses for an application:

- **Not Started**: The form has not been accessed. All the forms are initially in the **Not Started** status. Accessing the page will change the status to **In Progress.**
- **In Progress:** The form will remain in this status until all the data has been entered and saved. The data will be saved as long as there are no critical errors.
- **Complete:** Once you have entered all the data within the form and there are no errors, the form status will be changed to **Complete.**

4. How do I complete the Contact Information section in an application?

You need to provide details for the following roles on the **Contact Information** page:

- Executive Director
- Medical Director
- Risk Management Coordinator
- FTCA Contact

To access this page:

a. Click the **Update** link for **Contact Information** on the **Free Clinics Status – Overview** page, or click the **Contact Information** link in the left navigation panel.

b. Click the **Add** button for each role.

   i. Enter the requested information.

   ii. Click the **Save and Continue** button.
   ► A read-only version of the contact information will be displayed.

   iii. Click the **Confirm** button to return to the **Contact Information** page.

   iv. You can **Update** or **Delete** the contacts, as necessary, using the context menu.

5. How do I complete Site Information section in an application?

a. Go to the **Free Clinic Site Information** page using one of the following methods:
   - Click the **Continue** button at the bottom of the **Contact Information** page.
   - Click the **Update** link in the **Site Information** section on the **Free Clinics Status – Overview** page.
   - Click the **Site Information** link in the left navigation panel.

b. When you start the **Site Information** section, the section will contain the words, **No Records to Display**.

c. Click the **Manage Sites** button, to load the **Manage Site – List** page.

> **Note:**
> The **Manage Sites – List** page lists all the sites that have been registered in the past.
> If no sites have been registered, this page will contain the words, **No Records to Display.**

d. Click the **Register New Site** button to start the process to register a new Free Clinic site.

e. Enter the requested Site Information in the **Enterprise Site Repository,** and click the **Continue** button.

f. Enter the site address information, and click the **Next** button.

g. Once the site has been successfully created, click the **Finish** button.

h. The **Free Clinics Sites Information – Update** page will be displayed.

i. Scroll down to the **Additional Information** section, and enter the requested information.

> **Warning:**
> A Free Clinic must have at least one **Main** site.

j. Entering the Executive Director and Medical Director information is optional, and should be completed only if it is different than the Free Clinic information you completed in the **Contact Information** section.

k. Click the **Continue** button to return to the **Free Clinic Site Information** page.

6. How do I add a previously registered site to an application?

a. In the **Free Clinic Site Information** page, click the **Manage Sites** button, to load the **Manage Site – List** page.

> **Note:**
> The **Manage Site – List** page shows all the sites that have been registered in the past.

b. Click the **Add to Application** link in the context menu for the Site you would like to add.
c. Verify that the **Free Clinics Sites Information – Update** page is loaded.
d. Also verify the **Site Name** and **Site Address** that is displayed on this page.
e. Scroll down to the **Additional Information** section and enter the requested information.

> **Note:**
> A Free Clinic must have at least one **Main** site.

f. Entry of the Executive Director and Medical Director information is optional, and should be completed only if it is different than the Free Clinic information you completed in the **Contact Information** section.
g. Click the **Continue** button to return to the **Free Clinic Site Information** page.

7. How do I complete Sponsoring Free Clinic Eligibility Section in an application?

a. The **Sponsoring Free Clinic Eligibility Section** is a series of **Yes/No** questions, with an option to provide comments for a **No** answer.
b. Enter your responses to the questions. Responses to questions marked with an asterisk (*) are required.
c. When instructed to provide an explanation, click the update icon (which appears as a notepad with a pencil) to open the comments box. Then enter your comment(s) in the comments box.
d. Click the **Save and Continue** button to proceed to the next section.

8. How do I complete the Credentialing and Privileging Systems section in an application?

a. The **Credentialing and Privileging Systems** section is a series of **Yes/No** questions with an option to provide comments for a **No** answer.
b. Enter your responses to the questions. Responses to questions marked with an asterisk (*) are required.
c. When instructed to provide an explanation, click on the update icon (which appears as a notepad with a pencil) to open comments box. Then enter your comment(s) in the comments box.
d. Click the **Save and Continue** button to proceed to the next section.

9. How do I complete the Risk Management Systems section of an application?

a. **Risk Management Systems Section** is a series of **Yes/No** questions with an option to provide comments for a **No** answer.
b. Enter your responses to the questions. Responses to questions marked with an asterisk (*) are required.
c. When instructed to provide an explanation, click on the update icon (which appears as notepad with a pencil) to open the comments box. Then enter your comment(s) in the comments box.
d. Click the **Save and Continue** button to proceed to the next section.

10. **For a free clinic application, will the information for all the Individuals included in the previous year's application be pre-populated?**

    - All the Individuals included in the previous year's (Initial Deeming, Redeeming, or Supplemental) application will be available in the system for you to select and add to the current application.
    - All the Individuals not included in the previous year's (Initial Deeming, Redeeming, or Supplemental) application will need to be added to the system using the **Add New Individual** button.

11. **How do I complete the Individuals section in an application?**
    When you start the **Individuals** section, the section will contain the words, **No Records to Display**. There are two ways to add Individuals to an application:
    - Add Individuals from a previous year's application
    - Add a new Individual

Adding Individuals from a Previous Year's Application:

a. On the **Individuals** page, click the **Add Individuals from Previous Application** button to view a list of all the Individuals included in the previous years (initial Deeming, Redeeming, or Supplemental) application.
b. Click the check boxes to select the Individuals that you would like to include in the application.
c. After selection of the Individuals, click the **Add to Application** button at the bottom of the page.

Alternately you can add the individuals, one at a time, by clicking the **Add to Application** link in the context menu for each listed individual.

Note:
You can only select Individuals to add from one page at a time.

d. **The s**elected individuals will be added to the **Individual** section of the application.
e. Repeat steps b-d to add additional individuals which are listed on other pages.
f. Click the **Update** link in the context menu for each added Individual, to verify that the information is correct.
   i. If any information is incorrect or missing, enter the appropriate values, then click the **Continue** button.
   ii. Verify the details of the recently changed individual in the read-only version, and click the **Confirm and Continue button** to return to the **Individuals** page.

Adding a New Individual

a. On the **Individuals** page, click the **Add New Individual** button.
b. The system will load a blank form to allow you to enter the data for a new Individual.
c. Enter the requested information in this form.
d. Specify the **Roles and Specialty** for the new Individual:
   i. Select all the roles applicable to the individual.
   ii. Click the **Load Specialty** button, then select the specialty.

> **Note:**
> If you select a role of **Other Service Provider**, you must enter the **Specialty** in the text box provided.

e. Complete the rest of the form, and click the **Continue** button.
f. Verify the read-only version of the Individual's information.
g. After verifying the information, you can perform the following actions:
   - **Add additional individuals:**
      i. Click the **Confirm and Add More** button to display a blank form for the **Add Individuals** page.
      ii. The system will load a blank form to allow you to enter the data for a new Individual.
      iii. Repeat steps c through f, as necessary.
   - **Return to the Individuals page:**
      i. Click the **Confirm and Continue** button.
      ii. The **Individuals** page will list the recently-added individuals.
      iii. At this point, if you feel that you ***still need*** to add additional Individuals, repeat steps a-f, as necessary.

12. How do I update the information for an Individual that I added to the application?

Click the **Update** link in the context menu for the Individual whose information that you want to update.

13. How do I delete an Individual from the list of individuals added to the application?

a. Click the **Delete** link in the context menu for the Individual that you want to delete.
b. A confirmation screen will be displayed to allow you to confirm the deletion of the individual.

14. If a Supplemental application is created after an Initial or Redeeming application is approved, will the Individuals added to the supplemental application receive coverage for the current calendar year, or the current AND the next calendar year?

If the Initial or Redeeming application is approved, Individuals submitted via Supplemental applications will receive coverage for the current calendar year, ***as well as*** for the next calendar year.

15. How do I complete the Attachments section in an application?

The **Attachments** section, on a single screen, lists all documents that you have to upload for an application.
To attach a document:

a. Click the **Attach File** button to open the Attachment dialog box.
b. Select the purpose of the attachment from the dropdown.
c. Click the **Browse** button, to open the **Choose File to Upload** Windows dialog box.
d. Browse to the file to be uploaded, make sure it's selected, and click the **Open** button.
e. Enter a short description of the attachment and click the **Attach** button to complete the attachment process.

16. How do I complete the Remarks section in an application?

You need to use the **Remarks** section to enter descriptive text about the application or an off-site event.

a. Enter text in the comments box of the **Remarks** section.
b. Click the on **Save and Continue** button to proceed to next section.

17. How do I complete the Signature section?

a. Go to the **Signatures** page by one of the following methods:
   - Click the **Save and Continue** button at the bottom of the **Remarks** page.
   - Click the **Update** link for the **Signatures** section on the **Free Clinics Status – Overview** page.
   - Click the **Signatures** link in the left navigation panel.
b. Enter the names of the Free Clinics officers, **(**the **Executive Director** and the **Free Clinic Medical Director)** in the text boxes of the **Certification and Signature** section.

> **Note:**
> Entering the full names of the Free Clinics officers, and clicking the **Save and Continue** button constitutes an electronic signature.

18. How do I review the application?

The **Review** page displays, in table format, all the sections in the FTCA Free Clinic application. It allows you to view or print any or all of the application sections.

a. Display the **Review** page by:
   - Clicking the **Save and Continue** button at the bottom of the **Signature** page.
   - Clicking the **Review** link in the left navigation panel.
b. Click the **View** link next to any section of the application to view a read-only version of that section.
c. Click the **Print All** button to print all HTML-format forms.
d. Click the **View** link to open a document which is not in HTML format.
   The document will open in its original format (e.g. Microsoft Word).
e. Use your computer's print functionality to print the document.

19. How do I submit an application?

The application submission process begins on the **Submit** page. The sections of the application and their completion status are displayed in a table format. All sections must be **Complete** before you can submit the application.

a. Verify that the Free Clinic Application Status for all the sections is listed.

> **Note:**
> The status can be: Not Started, In Progress or Complete. At this time all the sections **MUST** be in **Complete** status to be able to submit the application.

b. Click the **Proceed to Submit** button and verify that the page loads the FTCA Certification.

> **Note:**
> The **Proceed to Submit** button appears only if all sections are deemed **Complete.** At all other times, the button will not be available. This prevents you from submitting an incomplete application.

c. In the space provided, type the words **I Agree** and click the **Submit Application** button.
d. A confirmation message will appear, containing the Submission Date and Time as well as the FTCA Application Number.

20. How do I start work on a Change-Requested application?

a. Click the **Tasks** tab on top of the **EHBs Home** page.
b. Click the **Free Clinic** link in the left navigation panel.
c. Click **Application** under **Requests,** to load the **Application – Not Completed List** page.

> **Note:**
> The applications with a **Change-Requested** status will be listed in this page.

d. Click the **Start** (or **Edit**) link in the context menu for the application that you want to change.
e. The application will be displayed.
f. Edit the application, as indicated in the change-request email that was sent to you.

21. How do I know if an application is incomplete and not approved?

- You will not be able to submit an incomplete application. If an application is incomplete, the system will display error messages that need to be addressed before submitting the application to HRSA for review.

- During the review, if HRSA reviewers feel that some information is missing, or if additional information is required, they will send the application back to you using the EHBs Change Request function. This will allow you to update the application with the requested information. Along with the application being made available for update in the EHBs **Tasks**, you will also receive an email informing you that changes are required to the submitted application, and specifying the changes that need to be made.

- If the application is disapproved, you will be notified via email along with a notice of the reasons for rejection. The reasons may include being marked as ineligible for not meeting the needs of the program, etc.

22. How do I know I've submitted an application?

Once the Free Clinic application is complete, it will be displayed on the **Recently Completed** tab of the **Pending Tasks - List** page.

23. Now that I'm submitting applications online, does that mean I can track the review process?

A user cannot track the review process of a submitted application through the HRSA EHBs. Once an application is submitted, users for the organization will only be contacted by HRSA if additional information is needed. Otherwise, an applicant will be informed when HRSA makes a decision for the approval, rejection, or change-request of the application.

- If the application is rejected, HRSA will issue an email, containing a notice of the reasons for rejection. Reasons may include being marked as ineligible for not meeting the needs of the program, etc.
- If the application is approved, HRSA will issue an email, containing the Deeming Letter. The email will be sent to the organization's primary contacts.
- If the application is change-requested, HRSA will issue an email, stating that a change has been requested for the application. Follow the steps mentioned in **how do I start work on a Change – Requested application?** to change the application.

24. What if an off-site event occurs after a Redeeming application has been submitted?

In this case, you may create a Supplemental application, and specify the type of off-site event services provided.