Part A MAI Report: Annual Report Process

Part A Grantee
Technical Assistance Conference Call

2 P.M. Eastern time, June 5, 2005

Prepared for HRSA by SAIC, Inc.

Contract No: GovWorks 61368



Training Agenda

- Introductions & Training Objectives
- Overview of the New MAI Report:
 - □ What's New and What's Unchanged about the Report
 - The Report Data Elements
- Accessing the Report via Electronic Handbook (EHB)
- Working with the Web Forms
- Uploading the Required Report 'Narrative'
- Validating & Submitting the Report
- HRSA Review Process: What Grantees Can Expect
- Resources

Presenters:

- Melanie Wieland, Special Assistant to the Director HRSA, HIV/AIDS Bureau, Division of Service Systems
- Jillian Robey, Analyst, SAIC, Inc.
- Edouard Benjamin, Project Manager, SAIC, Inc.



Overview of the New MAI Report

What's Unchanged:

- Grantees will still submit an MAI Annual Plan and an MAI Annual Report (The two components of the "MAI Report" approved by the Office of Management and Budget in March 2007)
- Data elements remain the same
- A narrative must accompany both the *Plan* and the *Report*

Overview of the New MAI Report

Data Elements are the same

- Total MAI grant award amount
- Funds allocated/spent for grantee administration (5% cap for FY 2006)
- Total amount allocated for each service category
- Racial/ethnic communities to whom each service directed
- For each service provided to each racial/ethnic community:
 - ☐ Amount budgeted/spent, including carryover from prior fiscal years.
 - Service unit definition
 - Planned/actual service units provided
 - □ Planned/actual total unduplicated number of clients
 - □ Planed/actual unduplicated number of women, youth, children and infants
 - □ *Plan*: Up to three planned client-level outcome measures
 - Report: Document client-level outcome results

Overview of the New MAI Report

What's New:

- Submit your Plan and Report via the EHB
- Enter data using web forms (no longer use Excel workbook)
- System checks to alert you to potential data-entry errors
- EHB will 'manage' the Project Officer review process
- Grantees can download a copy of their Plan or Report
- This fall: Grantees will be able to access prior year Reports and grantee-specific "MAI Program Profile"

Overview: Part A MAI Report

- 2006 MAI Annual Plan:
 - Already loaded into system and available for review/download
 - □ <u>Revisions</u>: the MAI Data Support Team worked with grantees to enter any *Plan* changes. Additional changes cannot be made during submission of FY06 *Report*.
- 2006 MAI Annual Report:
 - ☐ Must submit via EHB
 - □ Submission period: June 11 July 11, 2007
 - □ Deadline: July 11, 2007
 - Critical: Don't wait until the deadline!

Overview: Part A MAI Report

Looking Ahead:

- 2007 MAI Annual Plan:
 - □ Grantees submitted an initial *Plan* as part of the new competitive MAI grant application
 - □ A revised final *Plan* will be due 90 days after receiving the FY07 MAI Notice-of-Grant -Award, and will be submitted via EHB
- 2007 MAI Annual Report: Will also submit via EHB

Getting Started: Access MAI Via EHB

- To Submit MAI Data Users Must Have:
 - □ EHBs user account
 - □ Part A (H89) grant in Portfolio
 - "Other Submissions" permissions for the Part A grant (assigned by Grantee Project Director)
- Step-by-step Web Demonstration at:
 - □ https://performance.hrsa.gov/hab/ehbdemo/MAI

Getting Started....

- Log into EHB
- 2. Click "View Portfolio" in the left menu
- 3. Select Part A (H89) grant
- 4. Click "Other Submissions" in the left menu
- 5. Click "Start Submission"
 - NOTE: User must have "Edit Other Submissions" privileges to start MAI Annual Report

E-HANDBOOK HOME

HRSA Electronic Handbooks for Applicants/Grantee



HELP

-Tools Menu-



Welcome

home | logout | contact us | glossary | help | guestions/comments

Contact Us:

Phone:

Time:

Email:

CallCenter@HRSA.GOV

877-Go4-HRSA/877-464- 9:00 a.m. to 5:30 p.m. Opportunities

4772; 301-998-7373 Eastern Time (E.T.), Monday through Friday

Applicant/Grantee Electronic Handbook (EHB) provides all potential and existing

- View Applications Peer Access

Manage Applications

Home

Grants Portfolio

Welcome

Funding

- Add to Portfolio
- View Portfolio

Manage Organization Profile

- View/Update Profile

Manage Personal Profile

- Update Profile
- Change Password My Registered
- Organizations

Logout

grantees a means to conduct various activities electronically.

- Manage Competing Applications
 - Read Electronic Submission Guide

WHAT WOULD YOU LIKE TO DO TODAY?

Verify Grants.gov Application (if

Click the

Work on Other Post Award Submissions

link Organization to Work on My Application

Search Funding Opportunities

- Manage Grants Portfolio
 - Read About Grant Registration
 - Add a Grant to My Portfolio
 - View Grants in My Portfolio
 - Work on a Grant
 - Work on My Noncompeting Application
 - Work on Other Post Award Submissions

Grant Handb

You will see a listing of all post-award reports available for submission through the EHBs for this grant

Grant Menu

Overview

View Awards

- Last NGA
- Award History

Administer

- New Users
- Existing Users

Submissions

- Monitor Schedules Noncompeting
 - Continuations
- Performance Reports
- Other Submissions

Logout

Following is the list of post award submission requirements for this grant. You can click on the submission type to edit/view/submit the submissions. Online submission is currently not supported for submissions whose name does not appear as a link. You should continue to mail those submissions.

Note: Please refer to all notice of grant awards for a complete list of post award submission requirements.

Displaying 1-5 of 5

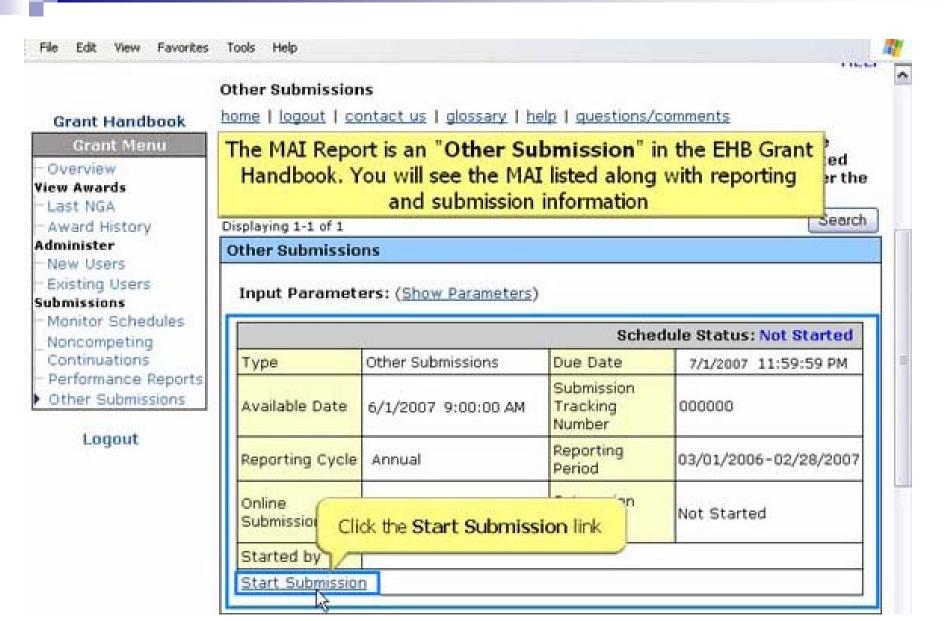
Search

MONITOR SCHEDULES

Input Parameters: (Show Parameters)

Submission Name	Type	7/1/2007	Schedule Status Not Started	Reporting Cycle	
Part A MAI Report	Other Submissions			CY (03/01/2006 - 02/28/2007)	

Click the Other Submissions link



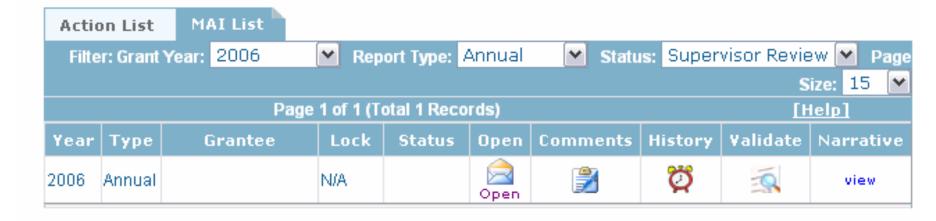


The MAI System will open in a separate window.

This is where you will enter data to complete your MAI Reports.



Workflow - Inbox



Using the Web Forms: Steps 1A & 1B

Step 1:

- □ 1A: Grantee Information: Based on user registration
- □ 1B: Funding Information
 - a: Part A MAI Award Amount (read-only) from Plan*
 - b: MAI \$\$ Approved for Carryover
 - c: MAI Funds for Grantee Administration (read-only) from Plan*
- □ Click "Next Page" to Continue

Using the Web Forms: Steps 1A & 1B

HAB MAI The Grantee Information Form (Step 1) page opens Data Entry | Workflow | Logout MAI Administration Release Lock 2006 Annual Report Access Mode: edit - Data can be edited by: None only - MAI Status: working Validate Step 1 of 3 Add Comments CUSTOMIZE WORKBOOK View Comments This should be completed by all MAI Grantees. Print Step 1: Grantee and Funding Information Upload Narrative View Narrative Fields with a red star (*) are required 1A. Grantee Information: MAI Navigation ☐ Customize MAI Mark Peppler a. Prepared By: - Step 1 1A: Pre-Populated with b. Title: Tester - Step 2A Information from EHBs - Step 2B c. Email reitester1@hotmail.com - Step 3 d. Telephone: 5129725081 MAI Report Sheets 1B. Funding Information: 1Ba: From Plan (Read Only) EIS-Asian \$ 1250000 Medical-Asian a. Title I MAI Award: 1Bb: Enter MAI \$\$ Approved b. MAI \$\$ Approved For Carryover: \$ 5129725081 for Carryover MAI Funds to Be Used for Grantee 1Bc: From Plan (Read Only) \$ 60000 Administration: Save Restore Initial Values Next Page > T Granicae Data Click the Next Page > button

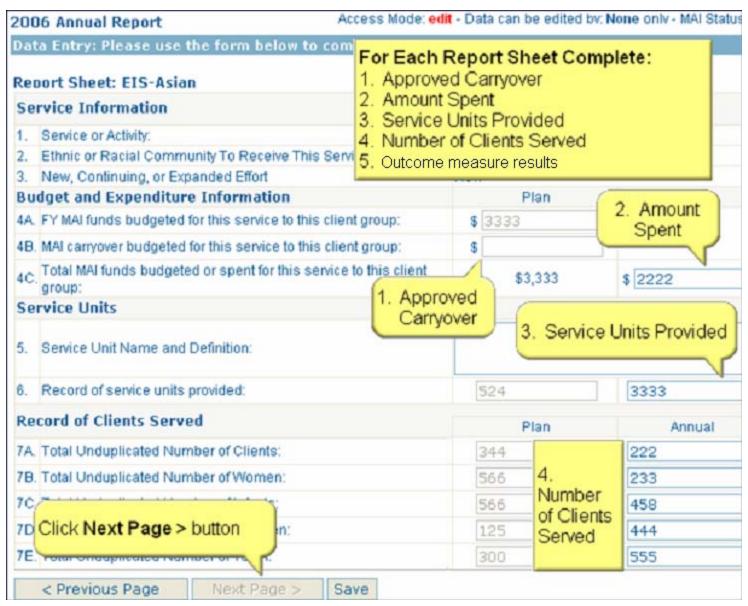
Web Forms: Steps 2A and 2B

- Step 2A: Service Categories (read-only)*
 - Click "Next Page" to Continue
- Step 2B: Race/Ethnicity
 - □ Effort and Amounts Planned (read-only)*

Complete Web Forms: Step 3

- Step 3: Enter Annual Report Information for each Service Category/Race combination
 - □ Enter Approved Carryover Amount used to deliver a service to a specific community
 - □ Enter Amounts Spent
 - Actual Number of Service Units Provided
 - Actual Number of Clients Served
 - Total unduplicated number of clients served
 - Unduplicated women, youth, children, infants served
 - Outcome Results
 - Click "Save" to save data

Web Forms: Complete Step 3



Upload Narrative

- Annual Report narrative must be a Word or WordPerfect document
 - Click "Upload Narrative" link in left menu
 - Browse grantee computer to locate the completed narrative document file
 - Click "Upload Narrative" button
 - 4. Confirmation

Upload Narrative

Release Lock	2006 Annual Report Access Mode: ed			
Kelease Lock Validate	Data Entry: Please use the form below to complete each re			
Add Comments View Comments Print Upload Narrative View Narrative	Report Sheet: EIS-Asian			
	Service Information			
	1.	Service or Activity:		
		munity To Receive This Service		
MAI Navigati Clic	k Upload Narrative xpanded Effort			
- Step 1		re Information		
- Step 1 - Step 2A - Step 2B - Step 3 MAI Report Sheets - EIS-Asian - Medical-Asian	4A.	FY MAI funds budgeted for this service to this client group:		
	4B.	B. MAI carryover budgeted for this service to this client group:		
	4C.	Total MAI funds budgeted or spent for this service to this client group:		
	Service Units			
	5.	Service Unit Name and Definition:		

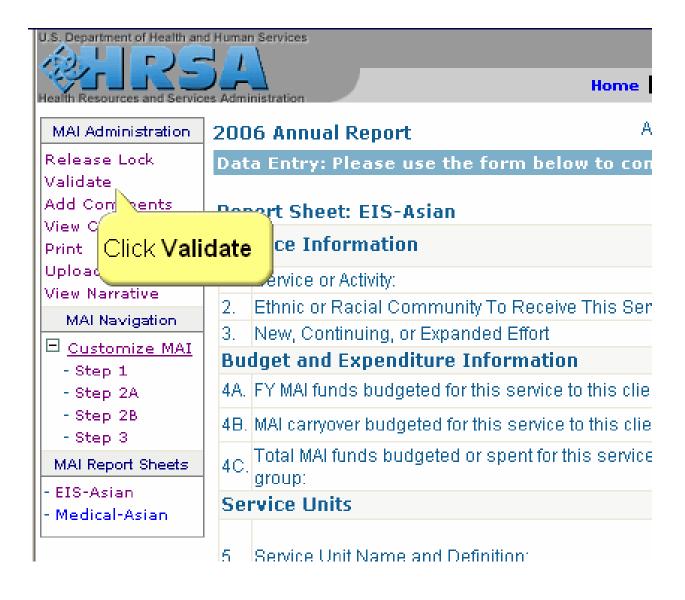


Validate Report

The MAI Report data system at HRSA will automatically check your Report for internal consistency and completeness.

 To start the validation process, click "Validate" in left menu.

To Validate Report





- A Validation Report will open in a new window with detailed information about any failed system checks (i.e., any detected problems)
- Types of failed system-check messages:
 - <u>Data Errors</u>: Grantees must correct any data errors before you can submit the <u>Report</u> for review
 - Data Warning: If amount expended does not equal the budgeted (planned) amount, the grantee must provide a brief explanation note

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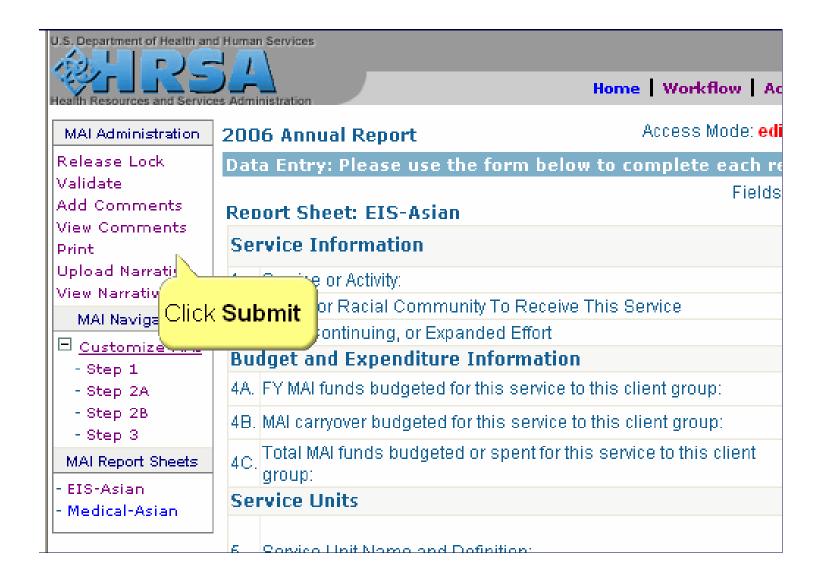
To Validate Report

- Correct all errors
- Respond to all warnings
- When finished, re-validate the Report. It must 'pass' system checks <u>before</u> you can submit it.
- 4. If you experience a problem, contact the CallCenter@hrsa.gov
 - By phone: 1-877-Go4-HRSA (1.877.464.4772)

To Submit the Report

- Click "Submit" in left menu
- Enter comment
- 3. Click "Submit for Project Officer Review" button
- 4. Grantee and Project Officer will receive email notification that the *Annual Report* has been successfully submitted to HRSA for review

To Submit the Report





Download Workbook for Your Records

- The MAI Report Web Application generates an excel workbook containing all Annual Report Data
- Click "Download Workbook" in left menu
 - Workbook is Read Only
 - □ All changes to your Annual Report should be made online

MAI Annual Report Timeline

- June 11: MAI Report System opens
- July 11: Deadline for FY06 MAI Report
- Project Officer will review Report and either Approve or Reject it for changes
- Grantees will receive email notification when their Report is approved or rejected

MAI Annual Report Timeline

- If 'Rejected:'
 - □ The email sent to you will identify <u>specific</u> problems
 - □ The Report will automatically revert to "Working on" status in the EHB
 - □ To make revisions, use the EHB to access your Report. Follow the steps previously described to update/correct specific data elements.
 - □ When corrections/revisions completed, you must validate the *Report* again before submitting it.
 - ☐ You must also enter a comment when submitting the revised *Report*, briefly explaining revisions made.

MAI Annual Report Timeline

Important:

Report revisions must be completed by July 31.

Therefore, submit your *Report* well before the July 11 deadline so that you will have time to address any data validation issues or revisions requested by your Project Officer

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Resources

- Online Help https://performance.hrsa.gov/hab/maiApp/help/
- Updated 2006 MAI Annual Report Instructions
- HRSA Call Center
 - □ CallCenter@hrsa.gov
 - □ 1-877-Go4-HRSA (1.877.464.4772)