Welcome to the PIMS Grantee Manual

These are detailed step-by-step procedures to help Grantees get the best from the system.

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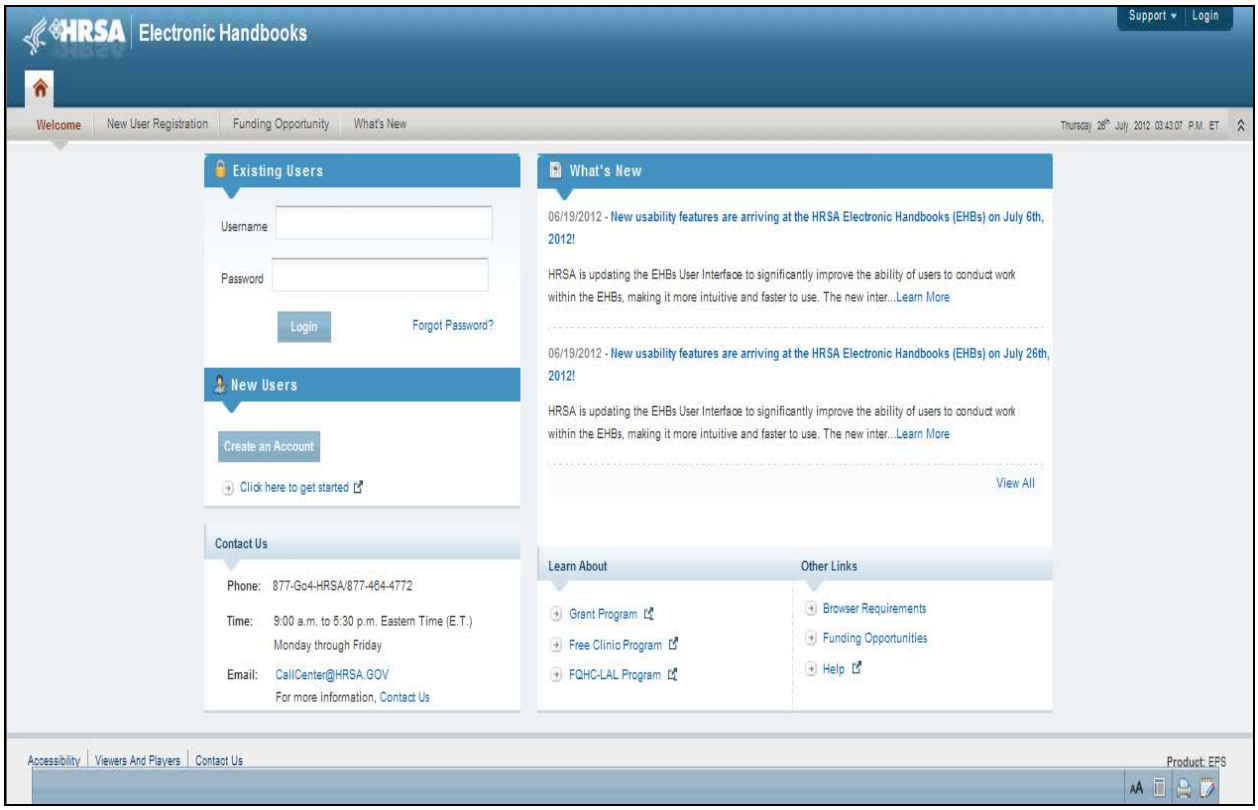
1.1 Grantee Login (How to Access and Use PIMS)

Grantees will access PIMS through EHB
Be registered with EHB

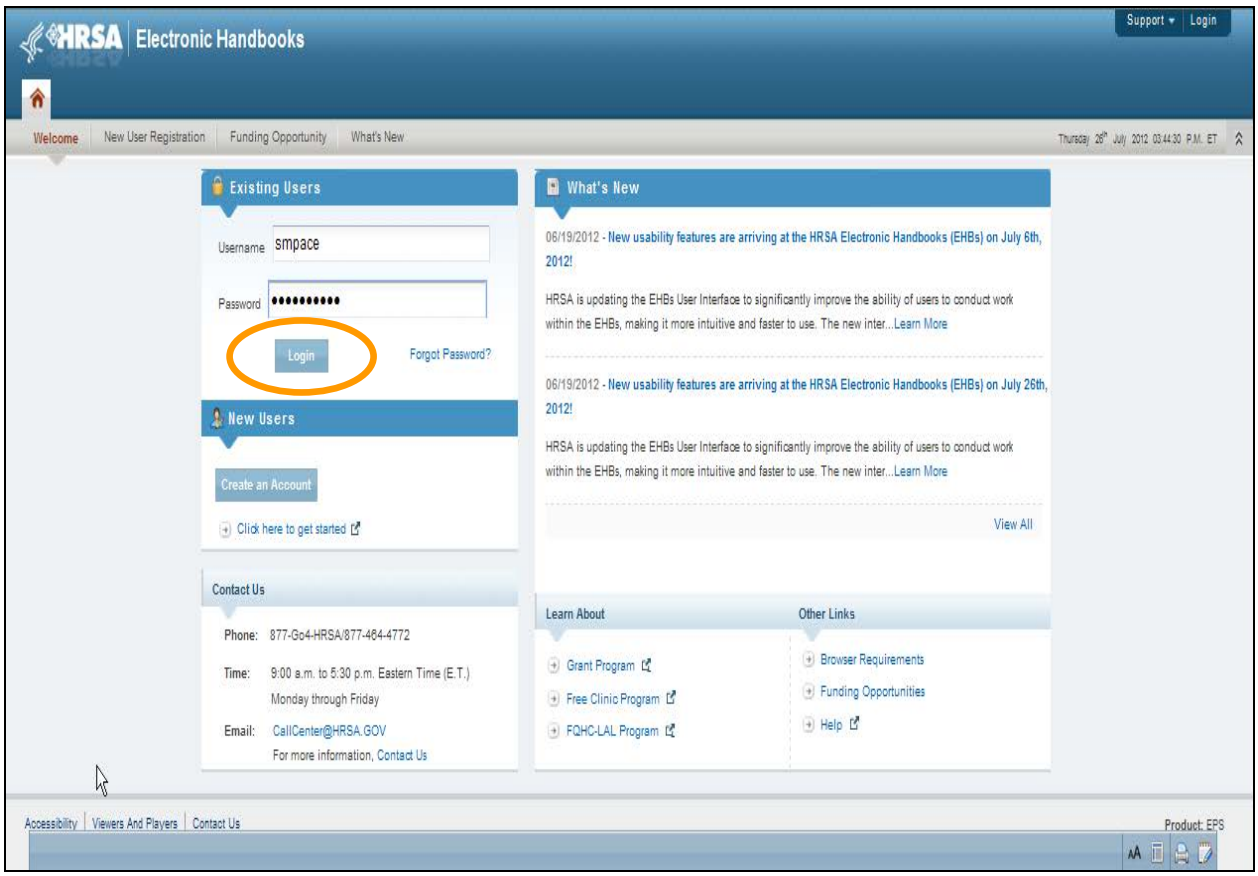
Type the following URL on your browser and hit “Enter”:
https://grants.hrsa.gov/webexternal/login.asp

This brings up the EHB logon screen



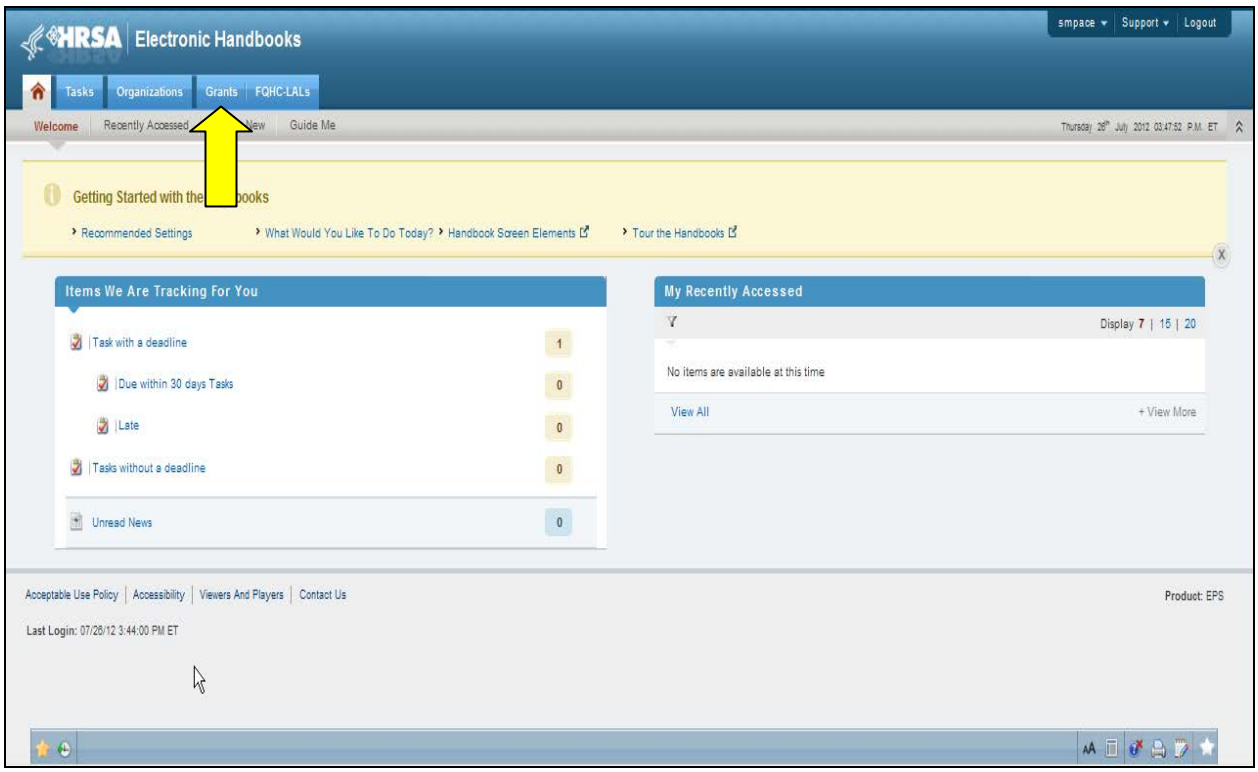
1.1.1 Username and Password

Enter your username and password and click “Login”

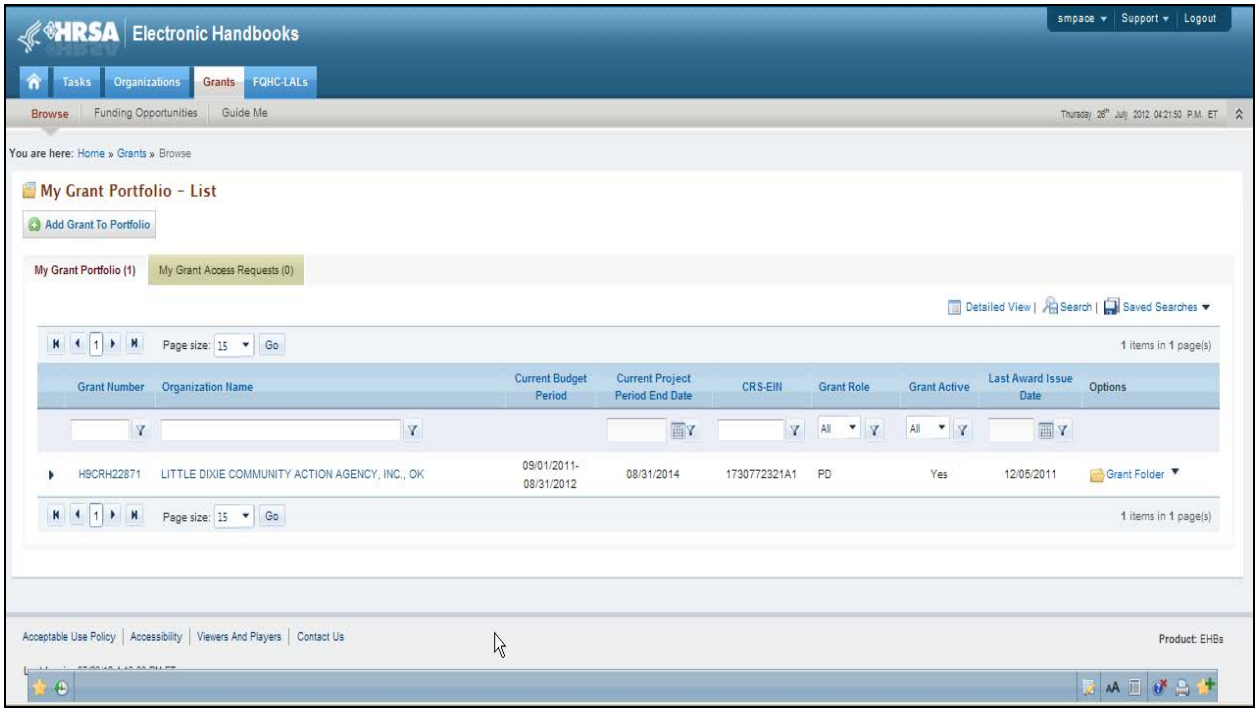


1.1.2 Welcome Page

From the “Welcome” page click on the “Grants” tab.

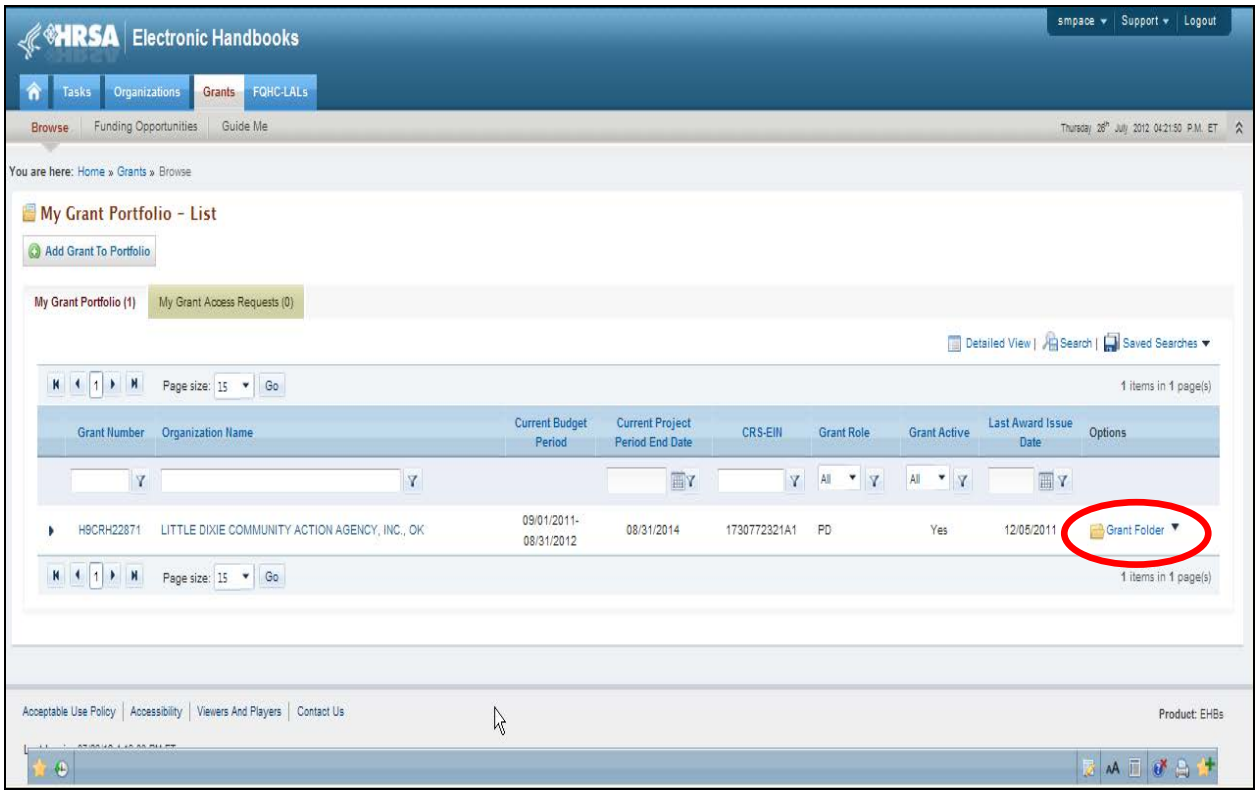


The “Grants” tab opens up the “My Grant Portfolio – List”

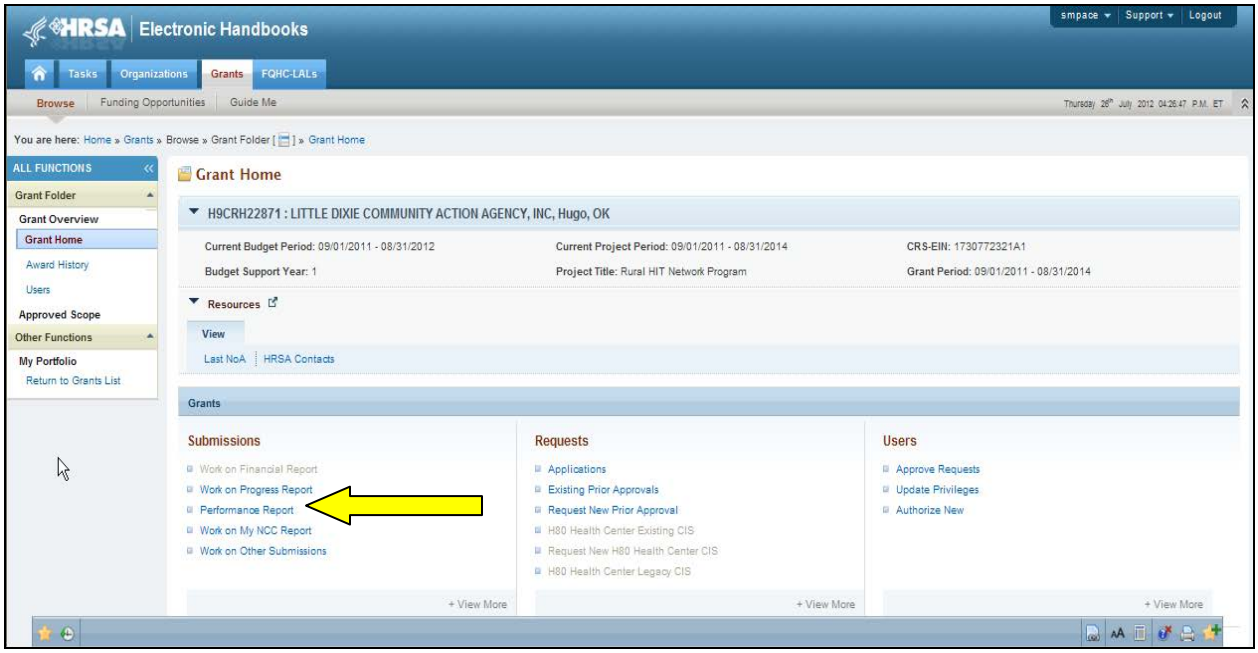


1.1.3 Open Grant Folder

Select a grant by clicking on the “Grant Folder” link in the last column of the Grants list displayed.

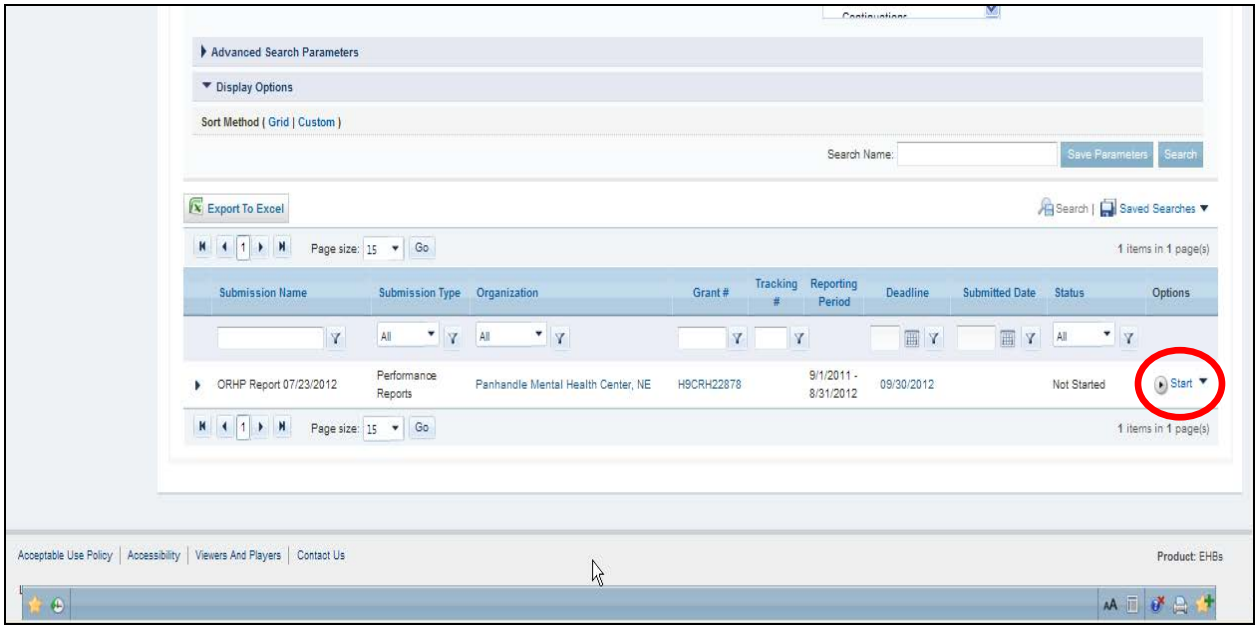


This brings you to the “Grant Home” page. Click on the “Performance Report” link.



1.1.4 Performance Reports

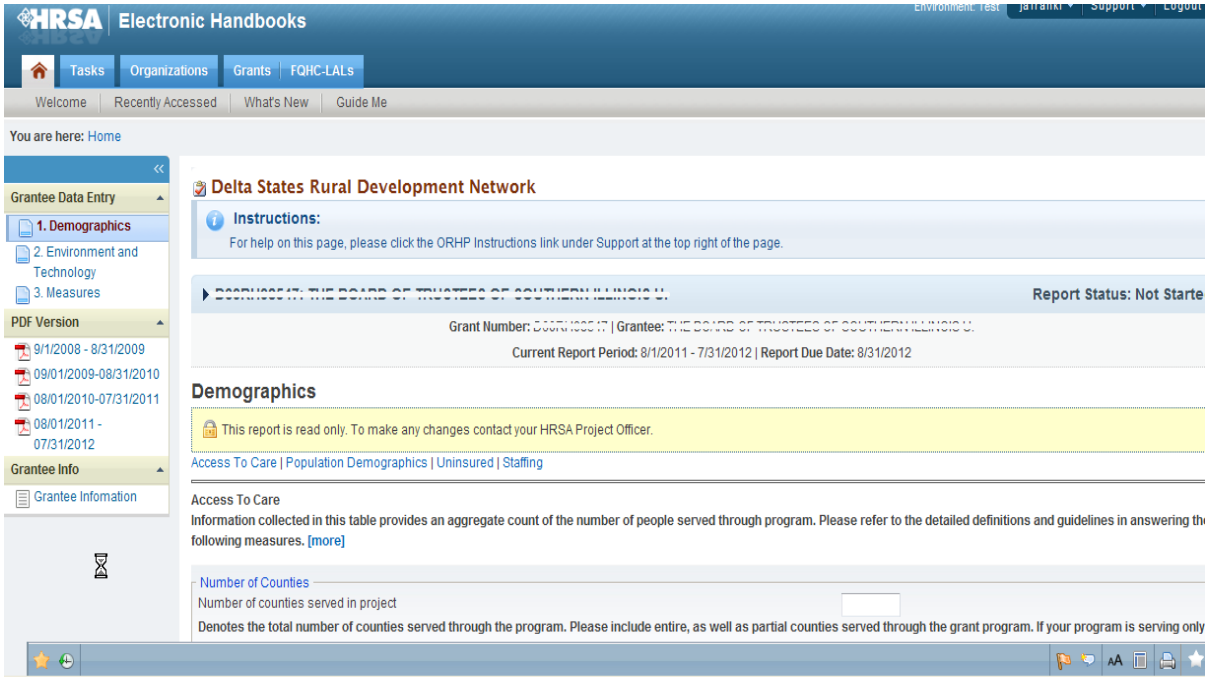
Choose to work on Performance Reports by clicking the link on “Start” from the Options column under your listed performance reports.



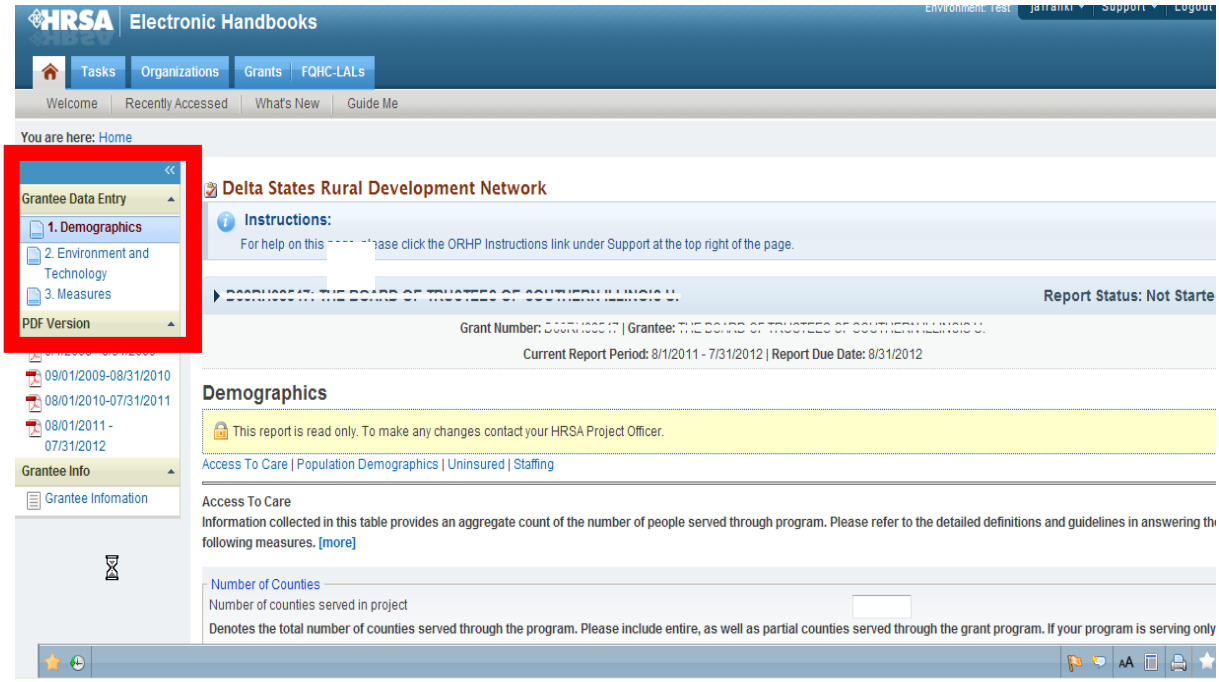
This will bring up the Performance Report for the select grant. Click on the “Continue” button to view the forms.

1.2 Complete Data Entry Forms

Enter data and/or select checkboxes in each of the form fields.



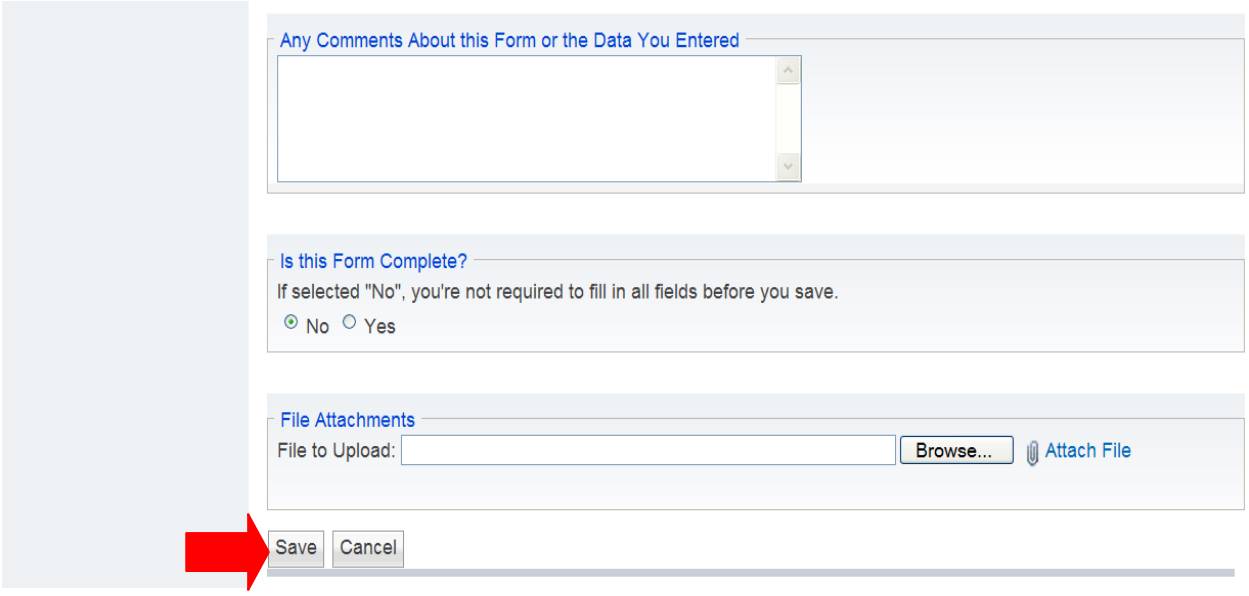
Each form can be accessed by clicking on the form link in the left side menu under **Grantee Data Entry**. However, if the form you are working on is not saved and you navigate to another form you will lose all data you have entered. Saving your form is covered in the next few sections.



1.2 Saving form as Not Complete

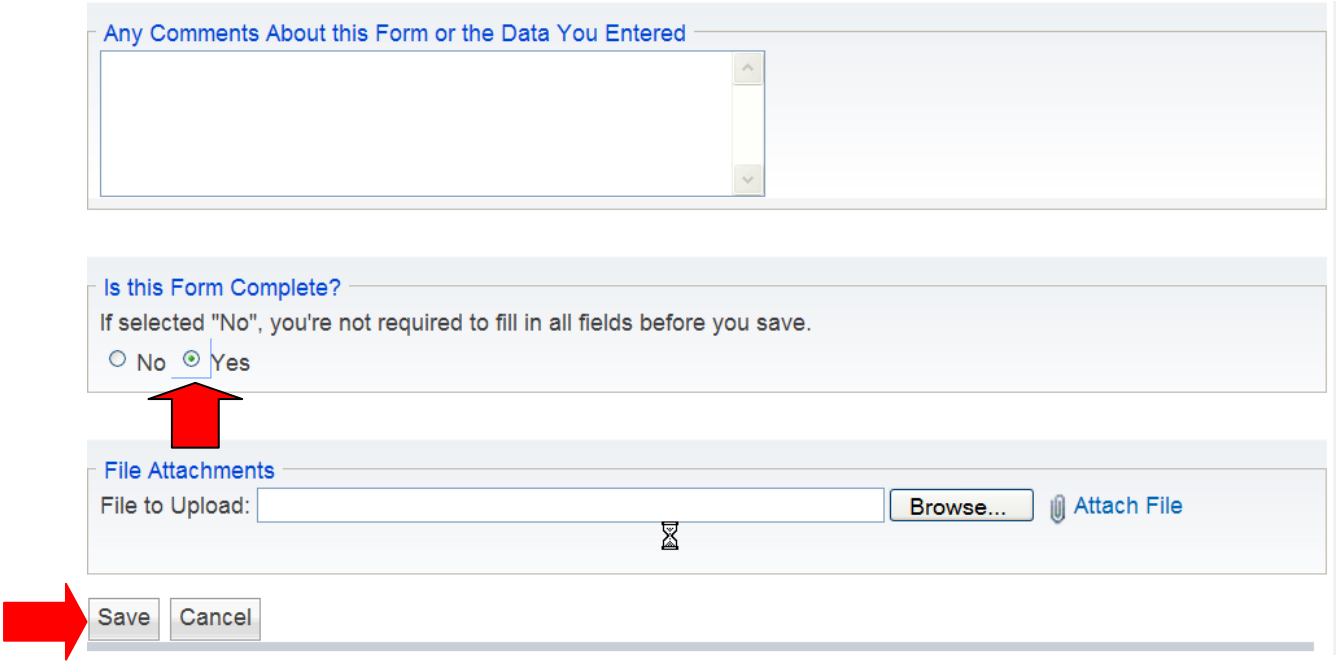
"Is this Form Complete" The Grantee is asked to respond "Yes" or "No" to this question at the bottom of each form under **Grantee Data Entry**. Initially this question is answered "No" and clicking "Save" at this point will allow you to save your data successfully even if you have invalid data or have not answered all required fields in the form. The one exception to this rule is if you have invalid characters in fields that only accept whole numbers. This will be flagged by the system and you will not be able to save your form as "Not Complete" unless these errors are fixed. Please keep in mind that you <u>must</u> be able to save all forms as "Complete" in order to successfully submit your report.

Click "Save" at the bottom of the form to save your entered data.

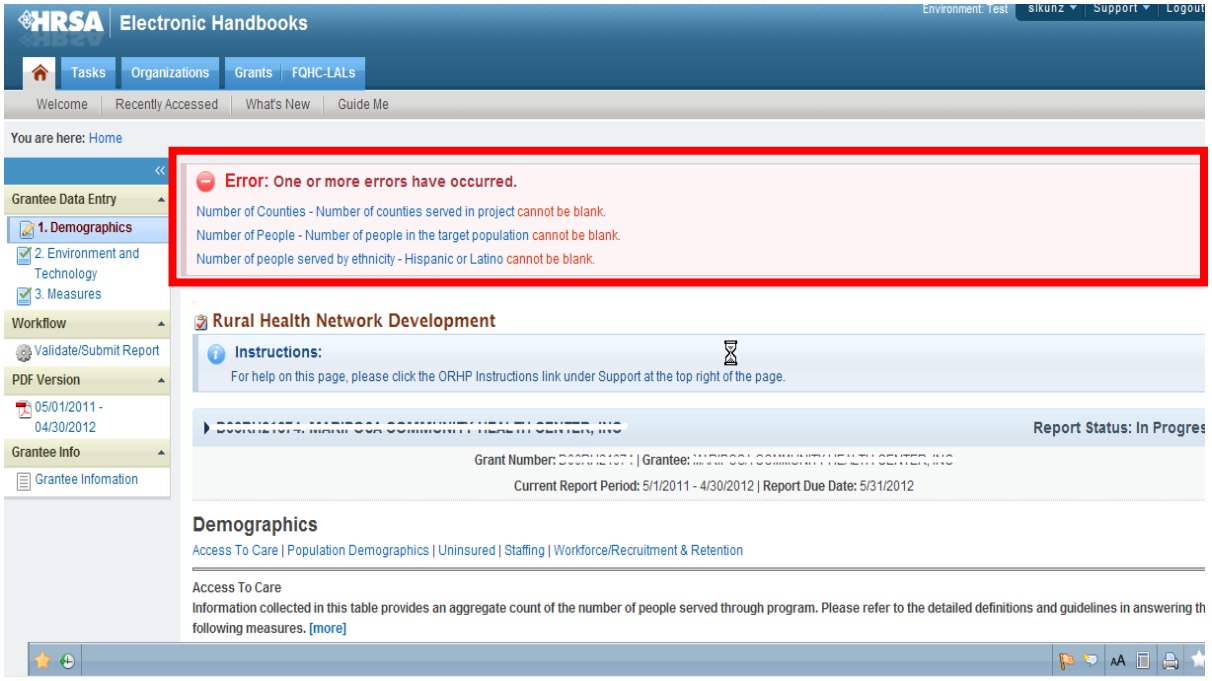


1.3 Saving form as Complete

Select "Yes" to the question which asks "Is this Form Complete" only when all required information is provided. Then click the "Save" button to save your data.

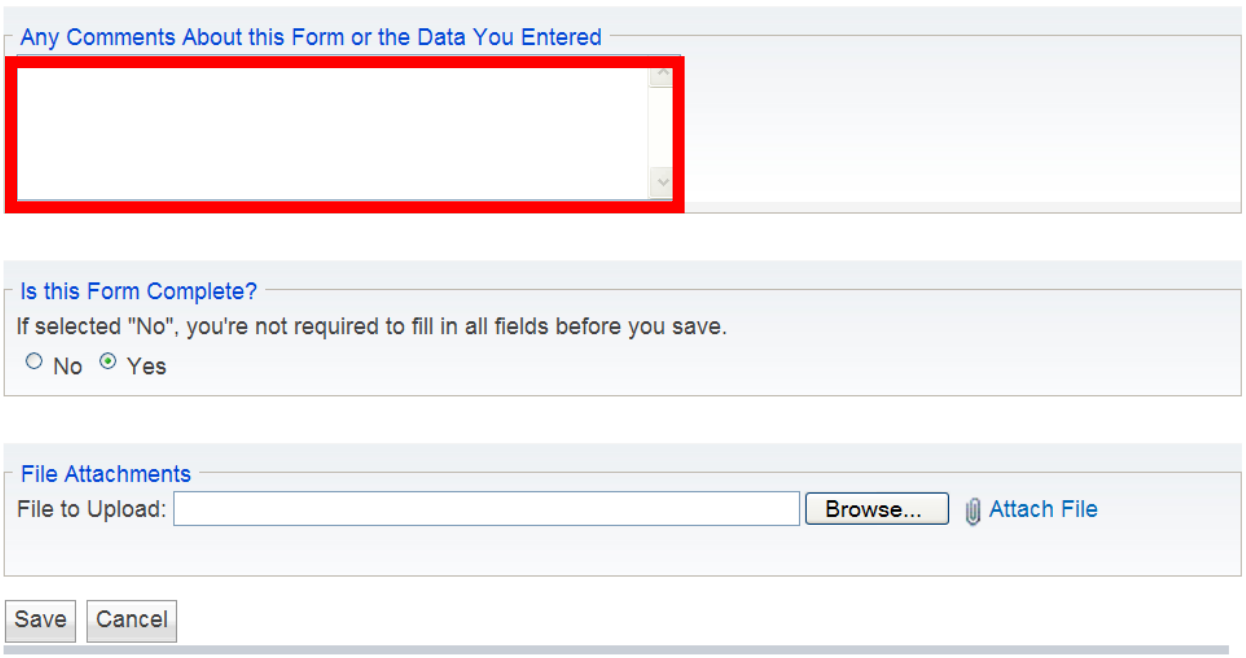


The form will not save if errors are found in the information provided, or if the grantee chooses to save as complete when all required information is not provided. An error message will be generated at the top of your form as shown below:



1.4 Add Comments to Data Form

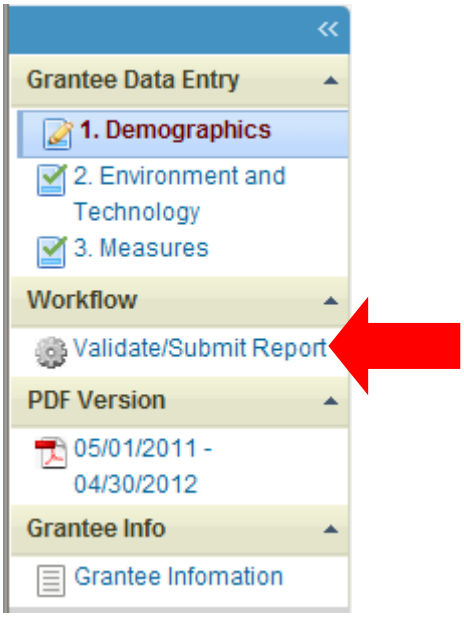
A text area is provided at the bottom section of each form where you can actually type comments up to 5000 characters. This information will be saved in the database for further use.



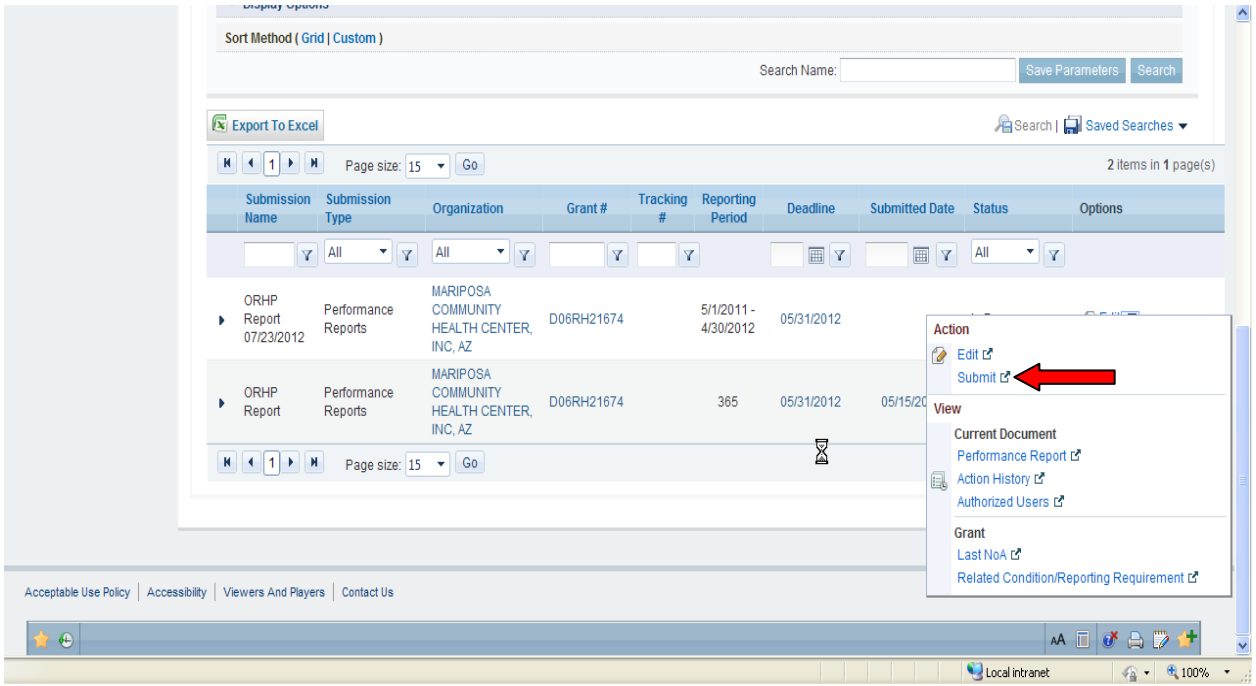
1.5 Validate and/or Submit Report

1.5.1 Validate Report

At any time the Grantee can choose to run validation rules against the already provided information by clicking the **Validate/Submit Report** link under "Workflow" in the left side menu if already logged in the system:



The grantee also has the option of submitting the report from the EHB side by selecting the **Submit** link from the "Action" menu which appears on the "Submission – All" page before accessing PIMS.



1.5.2 Validation Error

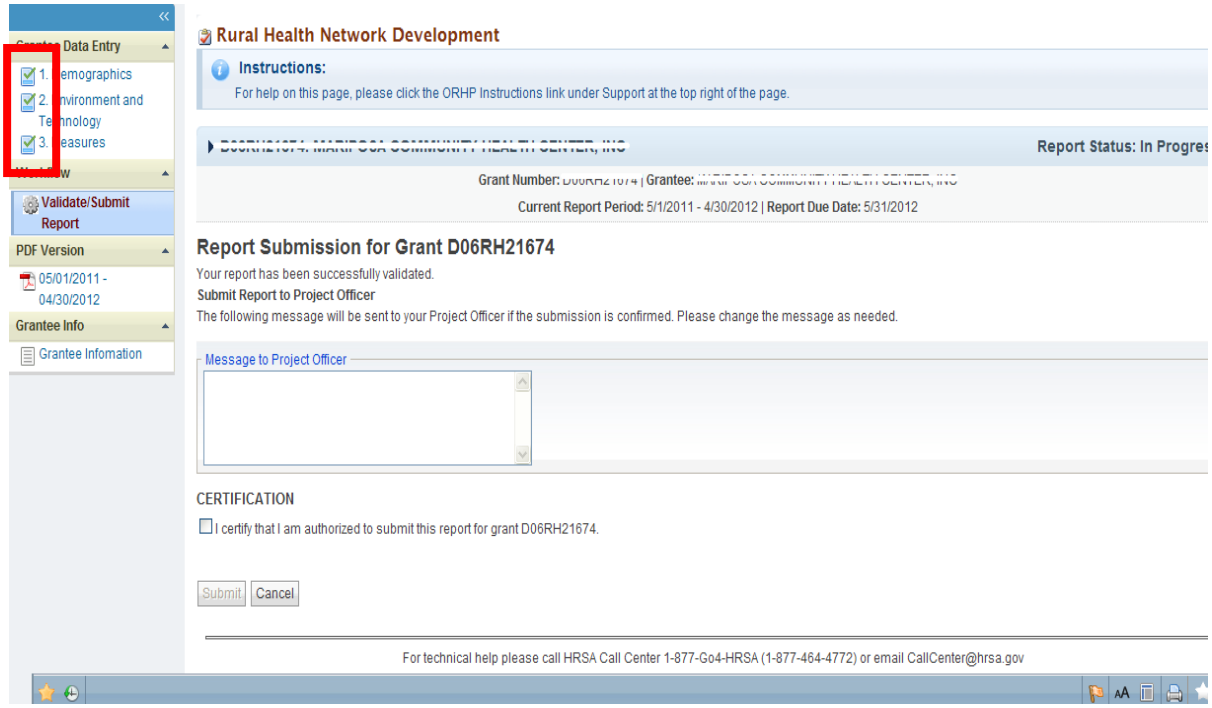
If there are validation issues a message with the list of errors is generated on the form where those errors occurred. These errors have to be fixed in order to successfully validate the report. In the left side menu under **Grantee Data Entry** the following icons are used to indicate to the user if the form has been saved as “complete” or “not complete”:

	Not Complete
	Complete

In the example above the “Demographics” form is “not complete” and possibly contains validation errors that need to be fixed before submitting. The grantee would need to click on the “Demographics” form, fix the errors and save the form as “complete” in order to successfully submit to their project officer.

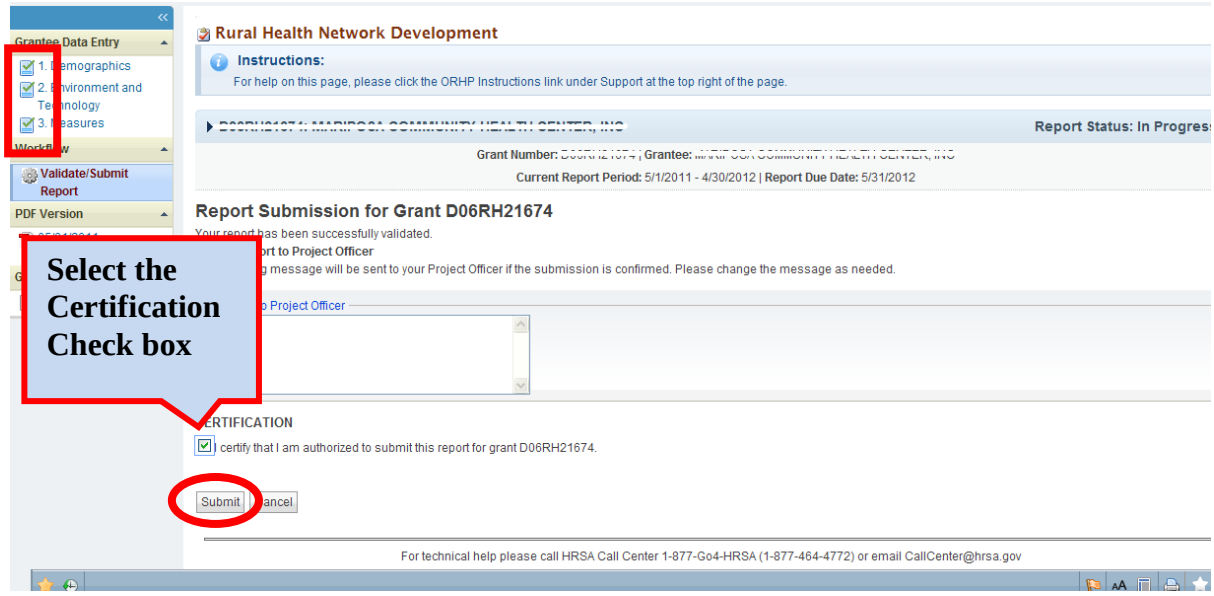
1.5.3 Successful Validation

If the report is successfully validated (this happens only when all forms are completed) a report submission screen is brought up giving the grantee the option to submit the report. Click “Cancel” to not submit the validated report.



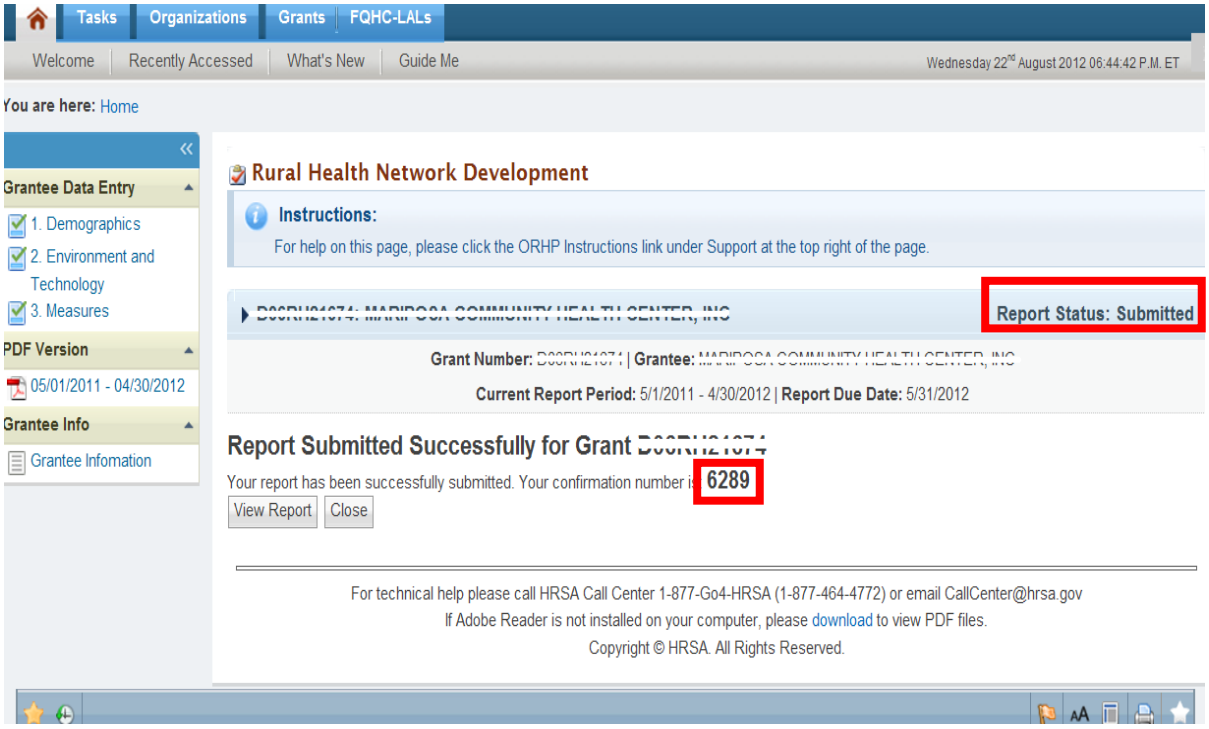
1.5.4 Submit Report

Click “Submit” after selecting the Certification check box. **Note:** It is entirely optional but you have the option of adding a message to be emailed to the project officer.



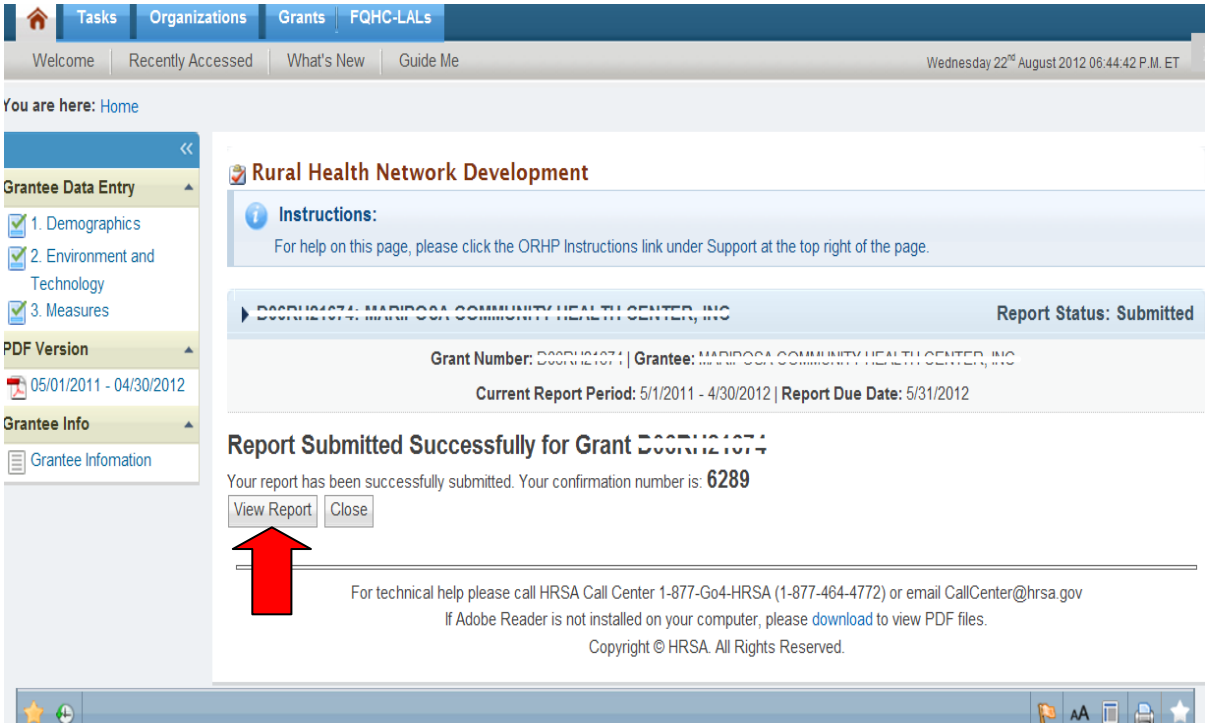
1.5.5 Report Submission Confirmation

A confirmation message is generated with a confirmation number for the submission. The **Report Status** also changes from “In Progress” to “Submitted”.

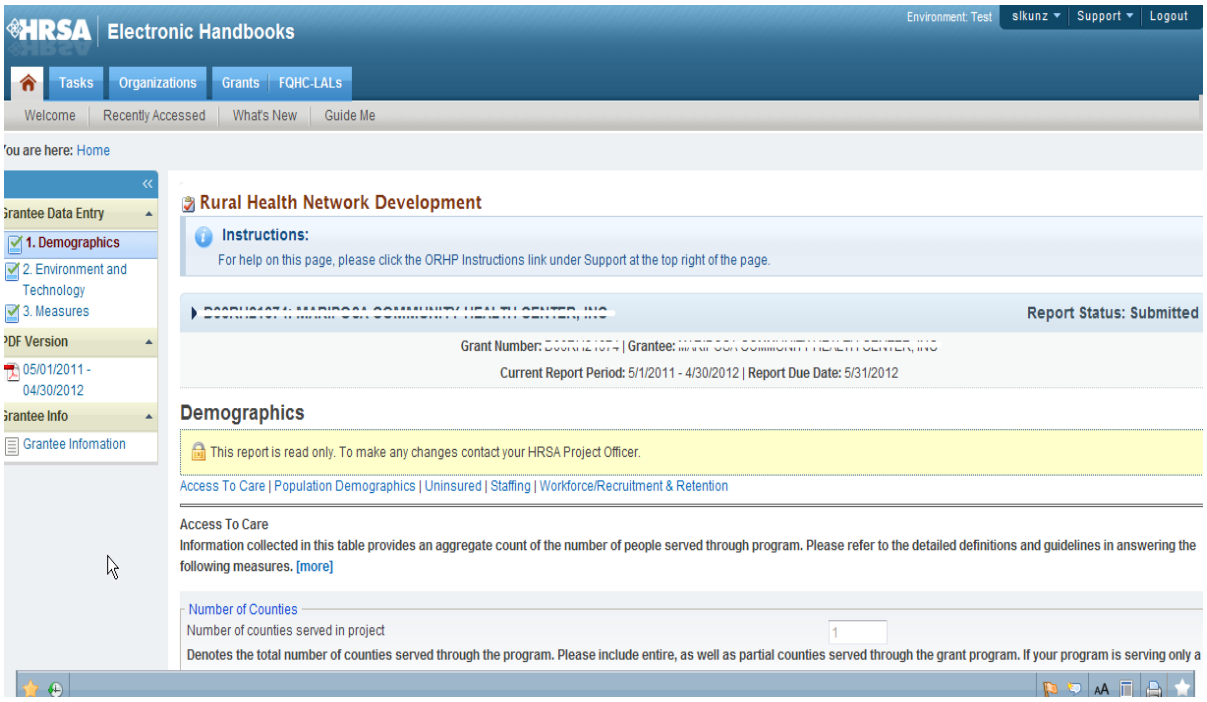


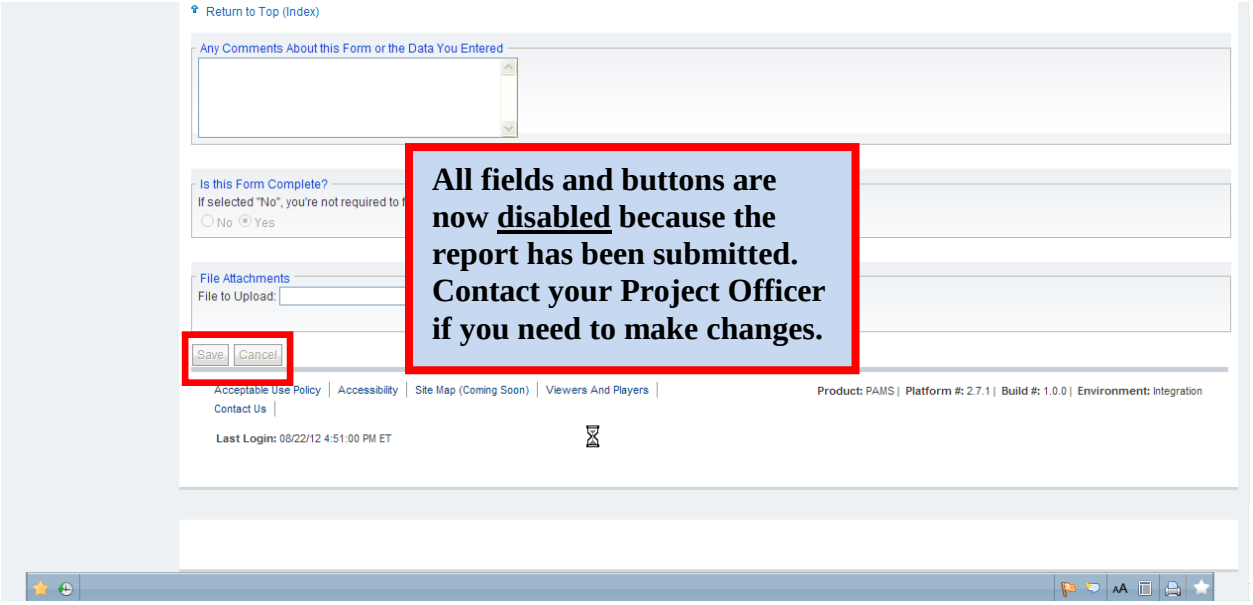
1.5.6 View Report

Click on the “View Report” button.



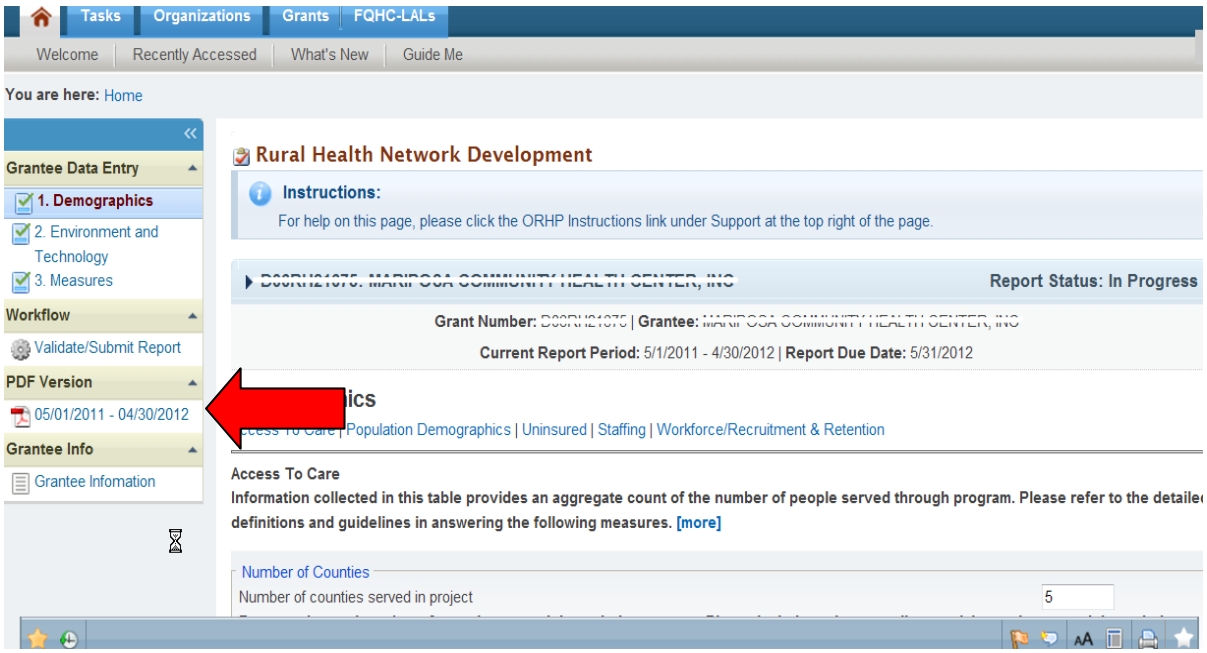
The report now appears in read only status and you can no longer make any changes. If you want to make changes you will need to contact your Project Officer.



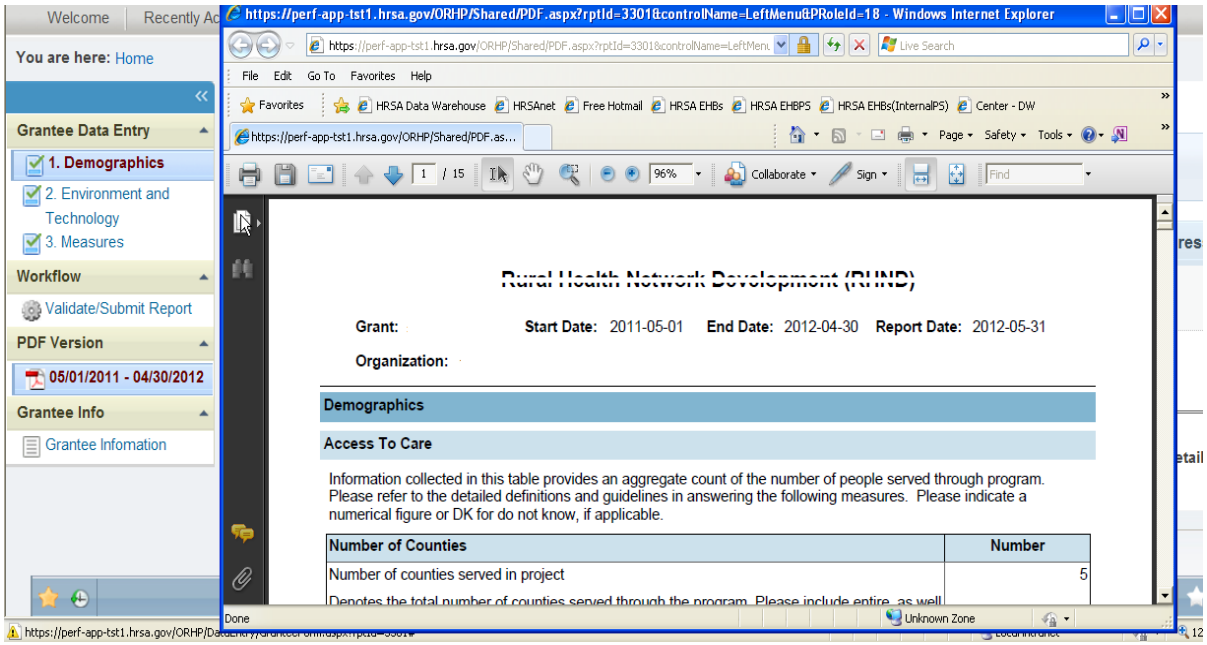


1.6 Print PDF

At any time Grantees can generate a PDF version of their report by clicking the reporting period dates link in the left side menu under the heading **PDF Version**.

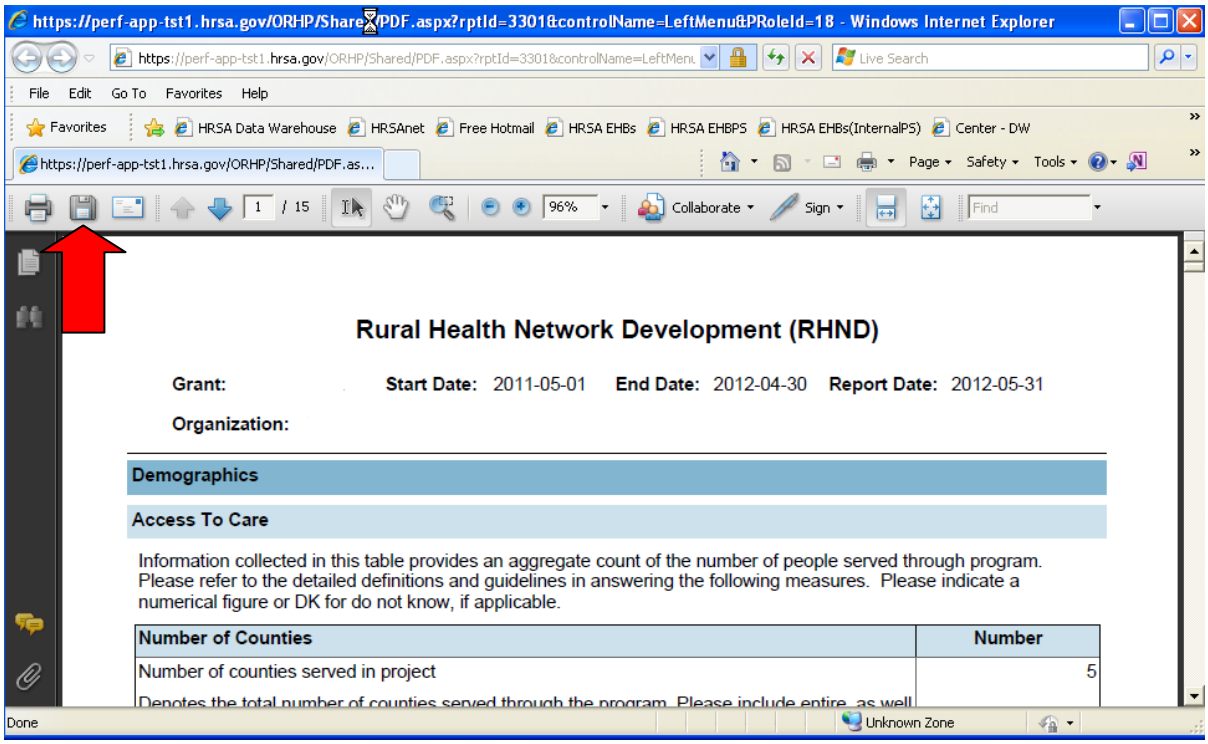


The PDF Version of the report you selected will display in a separate window as seen below:



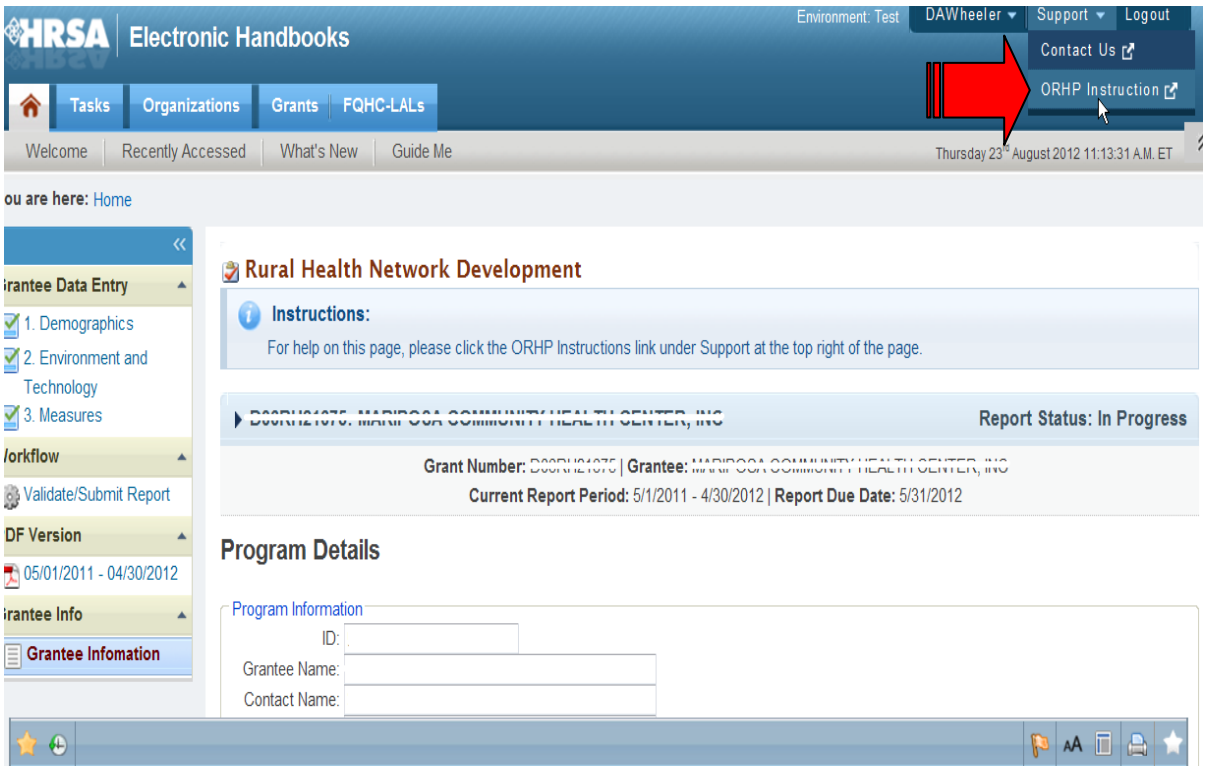
1.7 Save Report on Local Machine

Once you have generated the **PDF Print** version of your report (described in section 1.6) you can save the report to your local machine by clicking the icon to save your report.



1.8 ORHP Instructions

The PIMS Web online help files are another resource available to grantees if problems are encountered during reporting. These help files were created to assist grantees with several of the common issues you may encountered during your time in the PIMS system. Feel free to review the help files at any time by clicking the **ORHP Instruction** link under the "Support" drop down at the top right hand corner of the screen.



The ORHP instructions will display in a separate window as seen below: