Bureau of Primary Health Care (BPHC)

Scope Verification:

User Guide for Grantees

Table of Contents

[1. Introduction 4](#_Toc425430834)

[2. Significance of the Scope Verification Requirement 4](#_Toc425430835)

[3. Completing the Scope Verification Submission in EHB 5](#_Toc425430836)

[3.1. Accessing the Scope Verification Submission through the Other Submissions Page 5](#_Toc425430837)

[3.2. Accessing a Service-Related Scope Verification Submission through the Approved Scope/Self-Update Module 7](#_Toc425430838)

[3.3. Accessing a Site-Related Scope Verification Submission through the Approved Scope/Self-Update Module 9](#_Toc425430839)

[3.4. Completing the Scope Verification Submission (For a single site or service) 10](#_Toc425430840)

[3.4.1 Pending Verification 11](#_Toc425430841)

[3.4.2 Implemented 11](#_Toc425430842)

[3.4.3 Will Not Implement 11](#_Toc425430843)

[3.4.4 Requesting Extension 11](#_Toc425430844)

[3.5. Completing the Scope Verification Submission (For Bundled services) 12](#_Toc425430845)

[3.5.1 Form 5A Sections 13](#_Toc425430846)

[3.5.2 Additional Information 14](#_Toc425430847)

[3.5.3 Review and Submit 15](#_Toc425430848)

[4. Project Officer Requests Change 16](#_Toc425430849)

[5. Copying a Change in Scope (CIS) Request 17](#_Toc425430850)

[6. Help and Support 17](#_Toc425430851)

Table of Figures

[Figure 1: Grant Home Page 7](#_Toc425430852)

[Figure 2: Submissions Page 7](#_Toc425430853)

[Figure 3: Services and Sites under Approved Scope on the Left Side Menu 8](#_Toc425430855)

[Figure 4: Self Updates: Services Details 8](#_Toc425430856)

[Figure 5: Self Updates: Required Service Pending Approved Changes 9](#_Toc425430857)

[Figure 6: Sites in Scope in Approved Scope/Self-Update Module, Showing 1 Site with a Scope Verification Submission 10](#_Toc425430858)

[Figure 7: Self Updates: Pending Approved Changes 10](#_Toc425430859)

[Figure 8: Sample Single Scope Verification Submission 11](#_Toc425430860)

[Figure 9: Status Overview Page 13](#_Toc425430861)

[Figure 10: Sample of a Form 5A Section 14](#_Toc425430862)

[Figure 11: Additional Information Section 15](#_Toc425430863)

[Figure 12: Review Page 16](#_Toc425430864)

[Figure 13: Submit Page 17](#_Toc425430865)

[Figure 14: Copy Request functionality 18](#_Toc425430866)

# Introduction

Policy Information Notice (PIN) 2008-01 establishes expectations for the implementation of changes to your scope of project when those changes involve adding or deleting a service or adding, deleting or replacing a service site.

The PIN identifies five changes to your scope that are deemed significant enough to require prior approval from HRSA:

1. Adding a service
2. Adding a new service site or converting an existing admin site to a service site
3. Replacing a service site
4. Deleting a service
5. Deleting a service site or converting an existing service site to an admin site

For such changes, you are given 120 calendar days from the date HRSA releases the Notice of Award (NoA) to implement the change. In addition, when you have implemented the change, you must verify this through the HRSA Electronic Handbook (EHB).

The purpose of this user guide is to give detailed instructions for fulfilling the Scope Verification requirement in the EHB.

Note: This user guide is not intended to provide policy guidance. Nor does it replace applicable Policy Information Notices (PINs) or Program Assistance Letters (PALs). These can be reviewed or downloaded at the [BPHC website](http://bphc.hrsa.gov/about/requirements/scope/index.html).

# Significance of the Scope Verification Requirement

As noted above, PIN 2008-01 stipulates that you secure prior approval from HRSA for any proposed change to your scope of project that involves adding a service, deleting a service, adding or replacing a service delivery site or deleting a service delivery site. HRSA will indicate its decision on a Change in Scope request within 60 days of receiving a complete request either by issuing a Notice of Award indicating approval or by sending an e-mail through the HRSA Electronic Handbook indicating disapproval.

You are given 120 calendar days from the date HRSA releases the NoA to implement the change to your scope. When HRSA approves the change and releases the NoA, a Scope Verification Submission is created in your EHB pending tasks. The proposed change is reflected in your scope when the NoA is released, but the change is flagged as “pending verification” and cannot be selected for any purpose (such as another CIS or program specific application) until it is verified or the respective Scope Verification Submission expires.

You must verify that you have implemented the change by submitting this Scope Verification Submission in EHB. In the Scope Verification Submission, you may either verify that you have implemented the change or you may indicate that you will not implement the change. You will not have the option to propose any new or additional changes. In the case where you will not implement the change, no change is made to your scope.

If you cannot submit the Scope Verification Submission within the 120-day period, because the change has not yet been implemented, you may, request an extension of up to 90 days from within the Scope Verification Submission in EHB. Extension requests are subject to review and approval by HRSA. The time HRSA spends reviewing your request will not count against any additional time you may be granted.

If you do not complete the Scope Verification Submission within 210 (120 plus an approved additional 90) days of the issuance of the NoA, the submission expires and no change is made to your scope. If you still want to make the change, you will have to submit a new Change in Scope request. If appropriate, you can copy a previously-submitted Change in Scope request and submit it with necessary revisions.

The Scope Verification module allows HRSA to track changes to your scope more precisely. New services and service delivery sites become active when you verify their addition; site replacements are effective when you verify them, and services and sites that are no longer active are removed as soon as HRSA approves.

Note: The verification clock only ticks while the Scope Verification Submission is pending with the grantee. If you request an extension, the clock stops while HRSA reviews your request. It starts again when HRSA again makes the Scope Verification Submission available to you. For this reason, it is possible (though not altogether likely) that the Scope Verification process could take longer than the maximum of 210 calendar days to complete.

# Completing the Scope Verification Submission in EHB

To complete the Scope Verification submission, login to EHB and access the Scope Verification Submission in your pending tasks.

Note: if you do not have a username, then you must register in EHB. Do not create duplicate accounts. If you experience login issues or forget your password, contact the BPHC Helpline for assistance at http://www.hrsa.gov/about/contact/bphc.aspx or 1-877-974-2742 (Monday – Friday, 8:30 AM - 5:30 PM ET).

There are two ways to access the Scope Verification Submission – through the **Submissions** page and the **Approved** **Scope** section.

## Accessing the Scope Verification Submission through the Other Submissions Page

1. Navigate to the [EHB login](https://grants.hrsa.gov/webexternal/login.asp) and enter your login credentials.
2. Click the **Grants** tab to navigate to the **My Grant Portfolio – List** page.
3. Click the **Grant Folder** link respective to the desired grant to navigate to the **Grant Home** page.
4. On the **Grant Home** page, click the **Work on Other Submissions** link (refer to Figure 1) to navigate to the **Submissions** page

Figure 1: Grant Home Page

Grant Home Page

Select "Work on Other Submissions" to access the "Submissions" page.  

1. The **Submissions** page (refer to Figure 2) lists all of the assigned Scope Verification Submissions, if any. Select the **Not Completed** tab in order to only see submissions that have not been completed yet.
2. Access the search fields by clicking **Search.** Filter the list page by inputting the Scope Verification tracking number (of a bundled Scope Verification) into the search page field **Submission Tracking Number Like**. Click **Search**.
3. Click the **Start/Edit** button of the searched Scope Verification Submission row to access the submission.

Figure 2: Submissions – Incomplete List

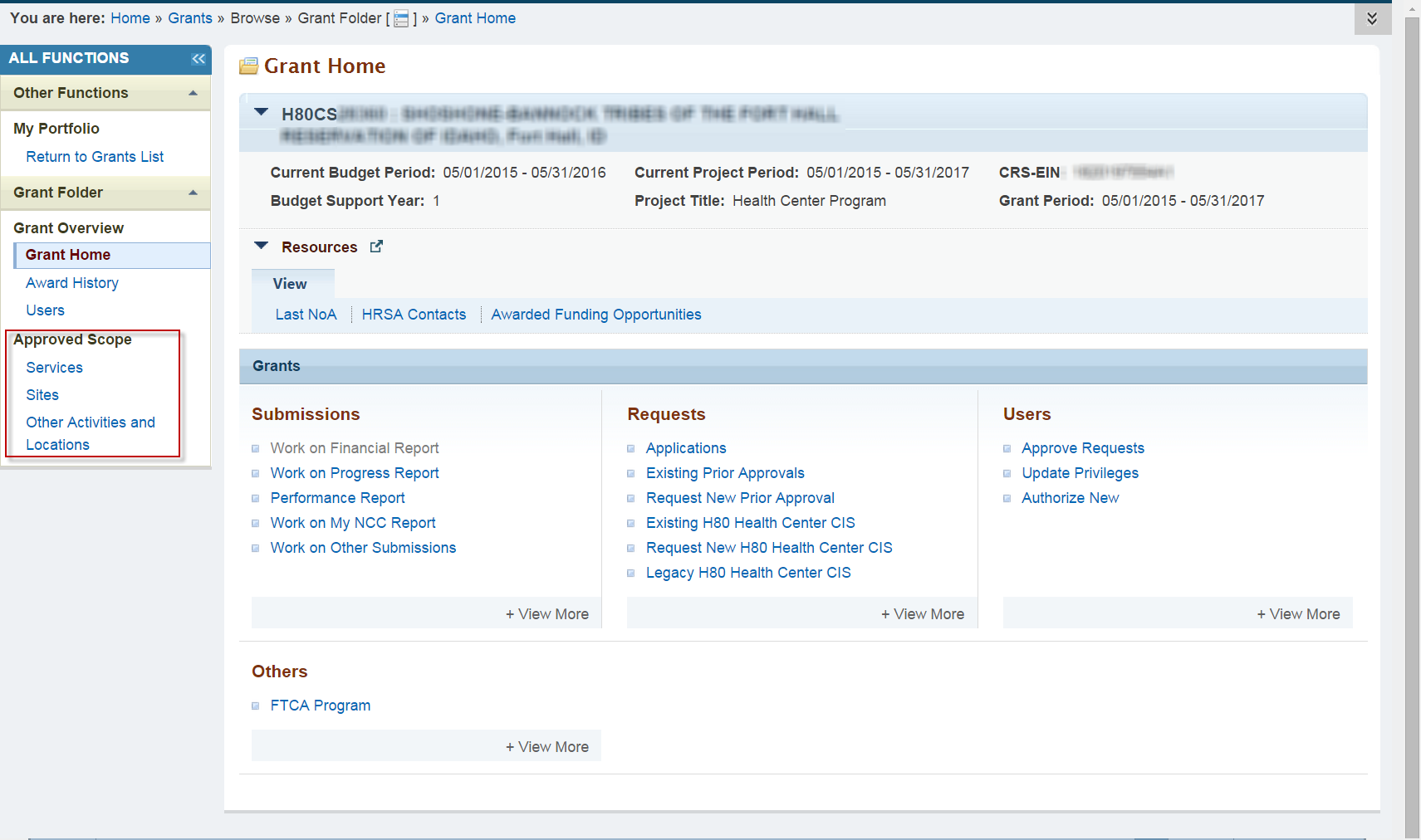
Screenshot of the "Submissions - Incomplete List" with search fields. 
Access the Start button for the respective Scope Verification.  

To complete the Scope Verification Submission, proceed to 3.4 or 3.5 below.

## Accessing a Service-Related Scope Verification Submission through the Approved Scope/Self-Update Module

1. On the **Grants Home** page, locate **Approved Scope** on the left side menu (refer to Figure 3). Under **Approved Scope**, click **Services**. This navigates to the **Self Updates: Services Details** page (refer to Figure 4).

Figure 3: Approved Scope in Grants Home Left Menu



1. Click **Pending Approved Changes (#)** (the (#) indicates the number of services to be verified)under the **Required Services** column to navigate to the **Self Updates: Required Services Pending Approved Changes** page. This page lists the services to be verified.

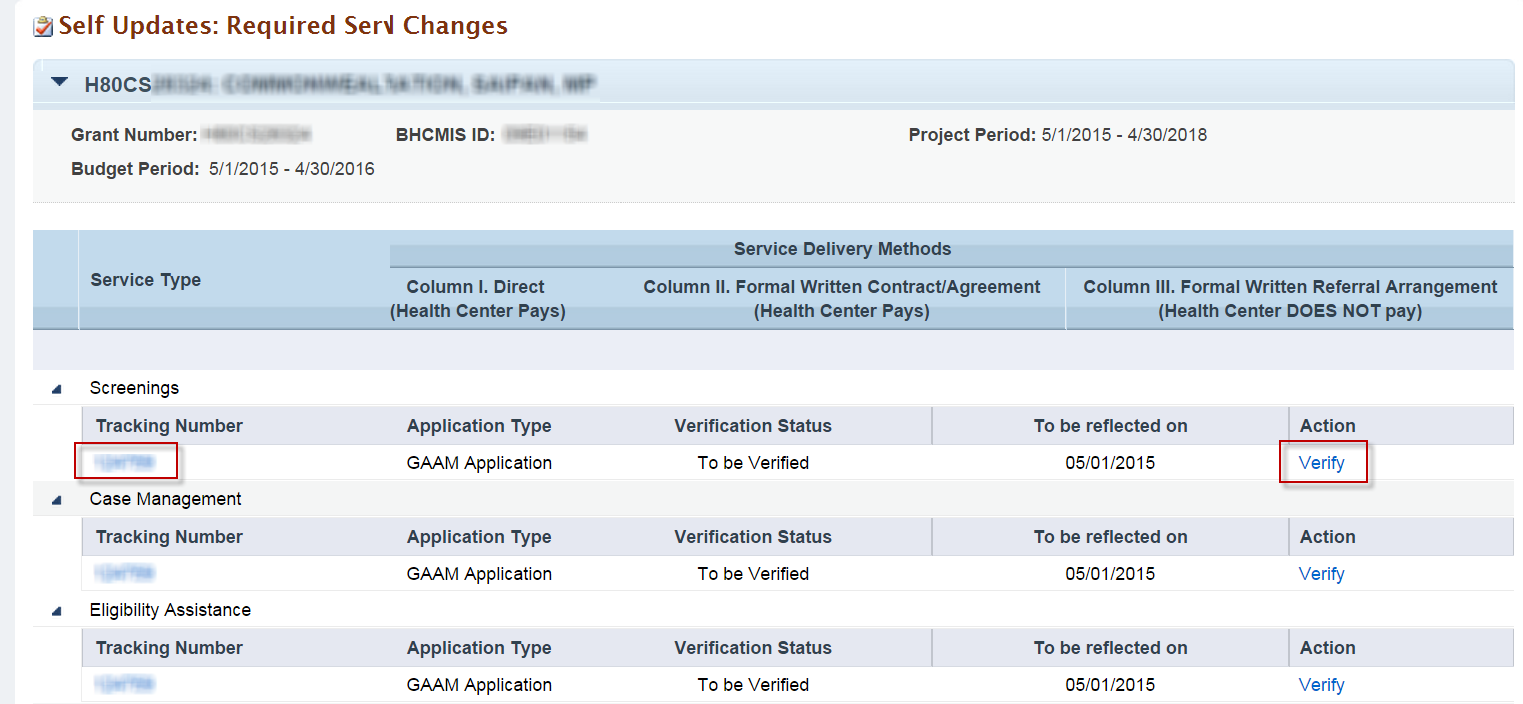
Figure 4: Self Updates: Services Details

Screenshot of the "Self Updates: Services Details" page.    

Click on the Pending Approved Changes link for any type of service.  

1. Click **Verify** for one of the listed services to open the respective Scope Verification Submission (refer to Figure 5).

Figure 5: Self Updates: Required Service Pending Approved Changes

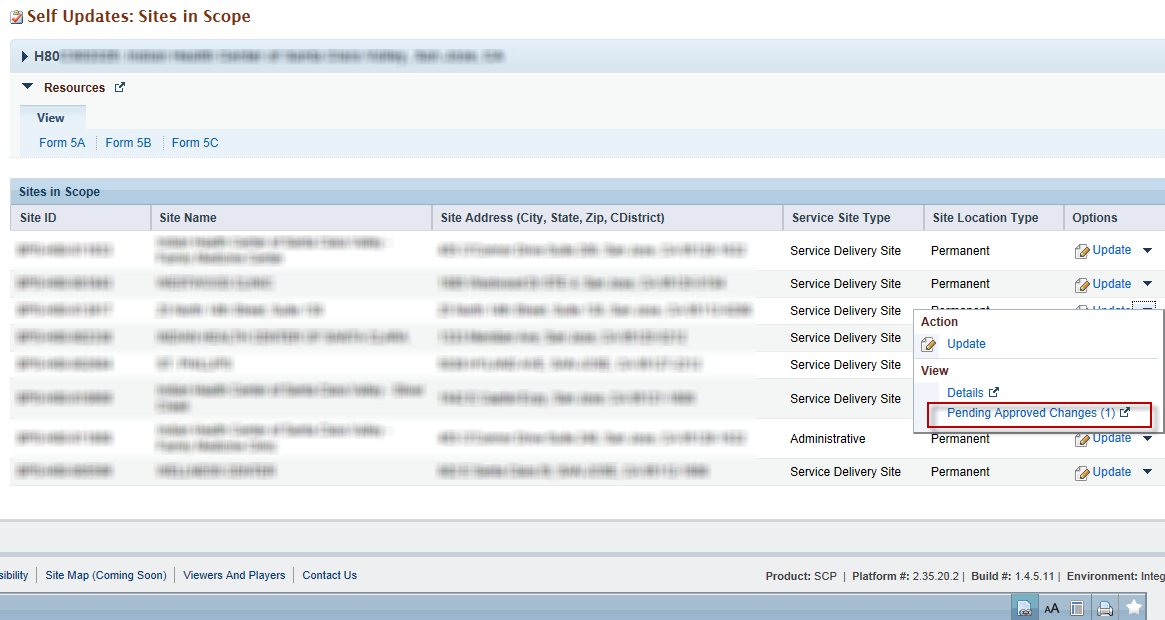


To complete the Scope Verification Submission, proceed to 3.4 or 3.5 below.

## Accessing a Site-Related Scope Verification Submission through the Approved Scope/Self-Update Module

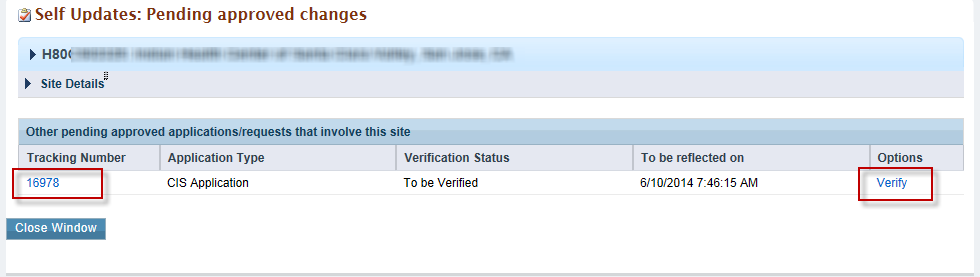
1. Click **Sites** in the left menu to navigate to the **Self Updates: Sites in Scope** page (refer to Figure 6).

Figure 6: Sites in Scope in Approved Scope/Self-Update Module, Showing 1 Site with a Scope Verification Submission



1. Under the **Options** context menu, click the **Pending Approved Changes** link for a site with Pending Approved Changes to view the **Self Updates: Pending Approved Changes** page (refer to Figure 7).
2. If desired, click the Tracking Number to open, in a popup window, an HTML-format copy of the CIS request or GAAM application from which the service was created.
3. Click **Verify** under the **Options** column to open the Scope Verification Submission.

Figure 7: Self Updates: Pending Approved Changes

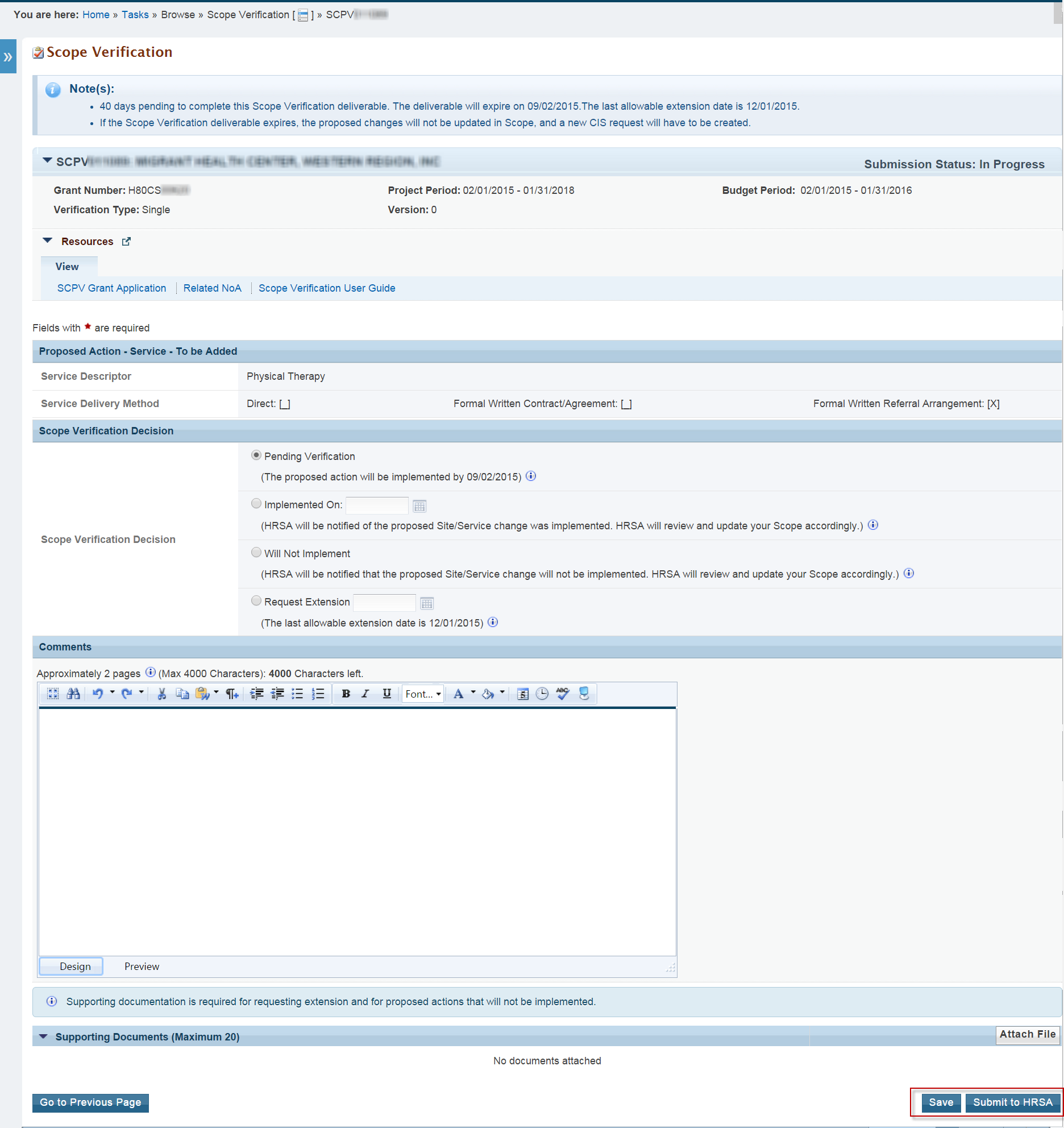


To complete the Scope Verification Submission, proceed to 3.4 or 3.5 below.

## Completing the Scope Verification Submission (For a single site or service)

Clicking **Start (or Edit)** opens the Scope Verification page, showing the Scope Verification Submission (refer to Figure 8).

Figure 8: Sample Single Scope Verification Submission



Follow the on-screen instructions and tooltip language respective to each decision to complete the Scope Verification Submission. You must select one Scope Verification Decision.

Note: You may request additional time if you are unable to complete the Scope Verification Submission within the allotted time. See section 3.4.4 below.

You have the option to provide any comments or supporting documentation in the **Comments** and **Supporting Documents** sections. Supporting documentation is required in order to not implement or request extension.

Click the **Save** button to save any work.

Click the **Submit to HRSA** button when the Scope Verification is ready for submission. The system will populate a read-only version of the submission with a success message.

Refer to the following Sections 3.4.1 – 3.4.4 for the available decisions you have when working on a Scope Verification Submission.

### Pending Verification

Select this option if the proposed action has not been implemented, but will be implemented by the expiration date.

### Implemented

Select this option if the proposed action has already been implemented. Provide an implementation date later than or equal to the BPHC Approval Date (if Scope Verification came from a CIS request) or NoA Release Date (if Scope Verification came from a grant application) and prior to or equal to the current date.

### Will Not Implement

Select this option if the proposed action will not be implemented.

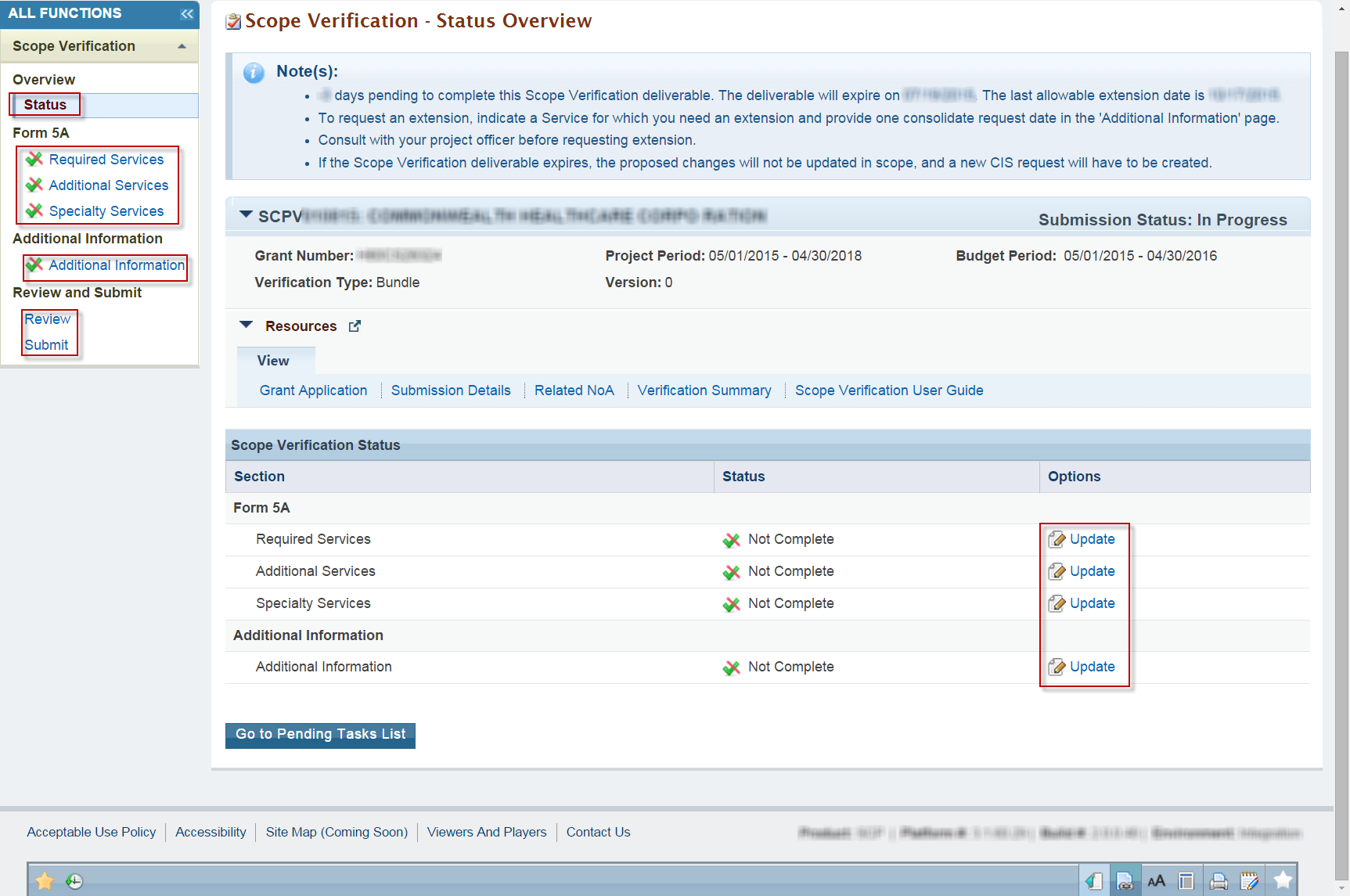
### Requesting Extension

Select this option to request up to 90 additional days if you cannot verify the change to your scope within the 120-day verification period. To request additional time, select the decision Request Extension and provide a date later than the current deadline and prior to or equal to the last allowable extension date.

## Completing the Scope Verification Submission (For Bundled services)

Click **Start** (or **Edit**) to open the **Status Overview** page (refer to Figure 9). The left menu provides links that allow you to navigate to any of the pages within the Scope Verification Submission. You can also navigate to any **Form 5A** page or the **Additional Information** page by clicking the respective **Update** button in the **Scope Verification Status** section.

Figure 9: Status Overview Page



### Form 5A Sections

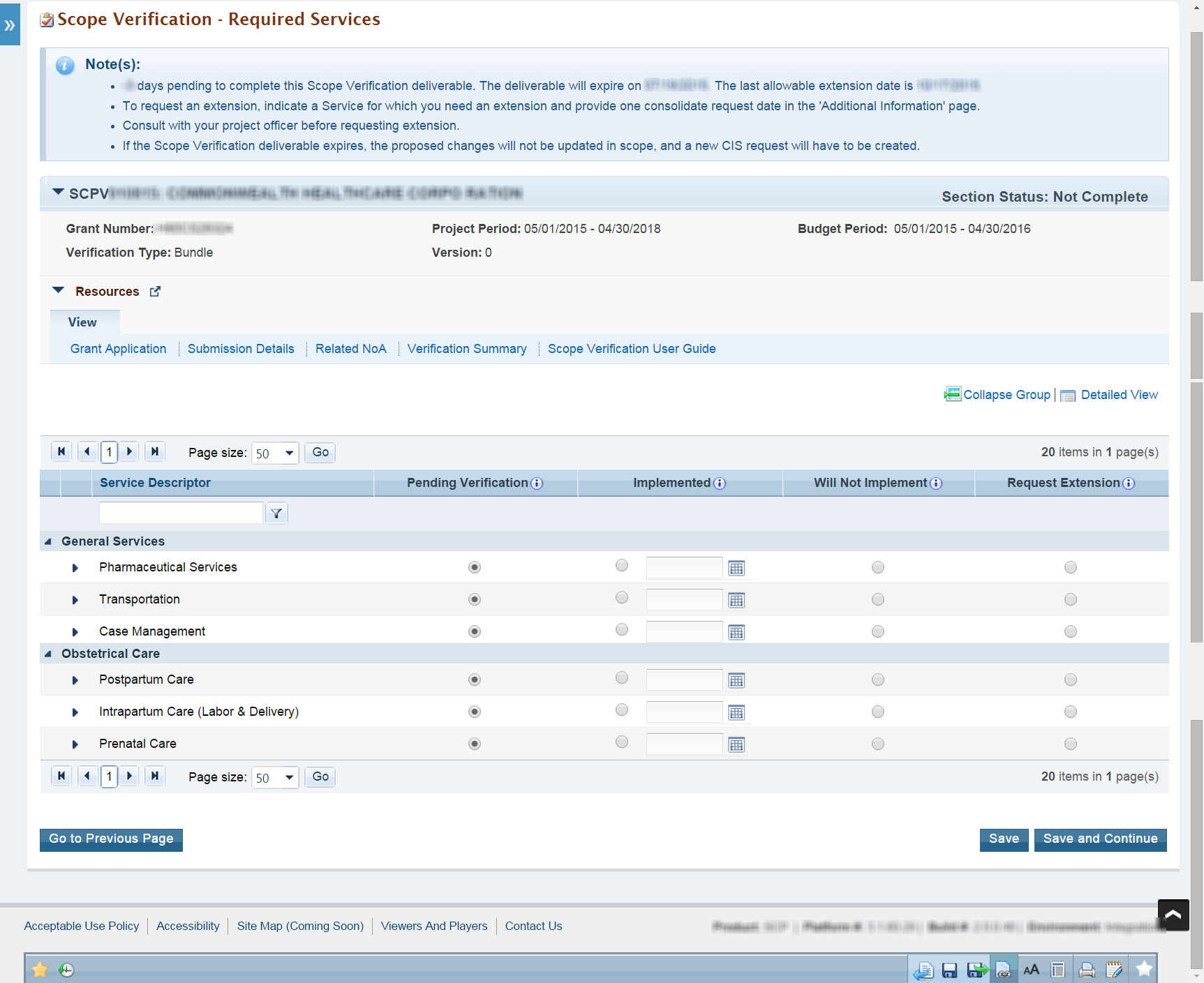
Each of the **Form 5A** sections (**Required Services**, **Additional Services**, **Specialty Services**) must be completed in order to submit the Scope Verification Submission (refer to Figure 10). Refer to the tooltip language for guidance on which decision to select.

The Scope Verification Submission cannot be submitted with every service marked as Pending Verification.

You can choose to request extension for each service as necessary. Provide only one extension request date for all services you requested an extension for, on the **Additional Information** page (refer to Figure 10).

Navigate to the previous page by clicking the **Go to Previous Page** button. Click the **Save** button to save your work on the page. Click the **Save and Continue** button to save your work on the page and navigate to the next page.

Figure 10: Sample of a Form 5A Section

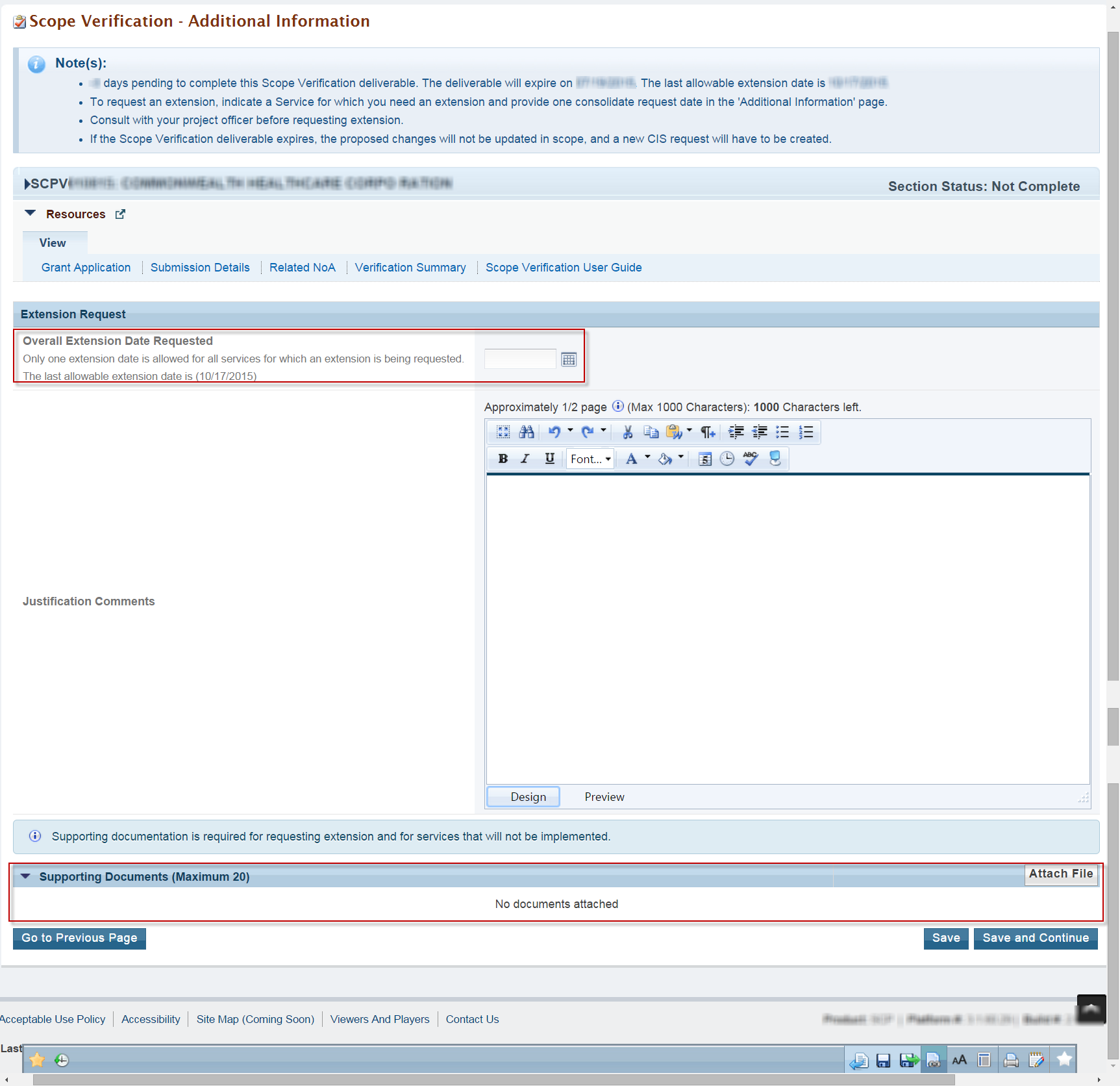


### Additional Information

The **Additional Information** page (refer to Figure 11) is where the extension request date, comments, and supporting documentation can be provided.

Navigate to the **Specialty Services** page by clicking the **Go to Previous Page** button. Click the **Save** button to save your work on the page. Click the **Save and Continue** button to save your work on the page and navigate to the **Review** page.

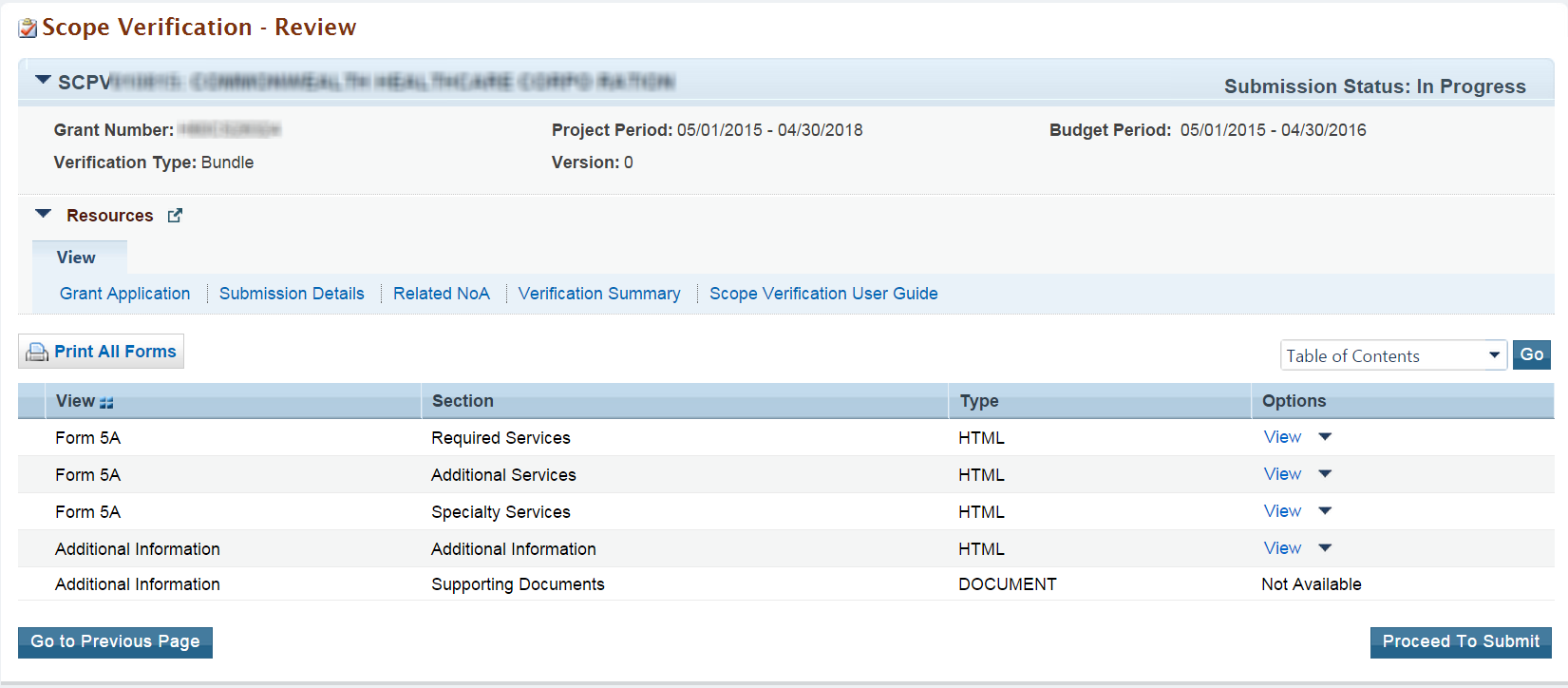
Figure 11: Additional Information Section



### Review and Submit

The **Review** page (refer to Figure 12) allows access to a read-only view of each of the **Form 5A** sections, the **Additional Information** section, and any supporting documentation provided. Access a read-only view of a section or supporting documentation by clicking the section’s respective **View** button. Navigate to the **Submit** page by clicking the **Proceed to Submit** button.

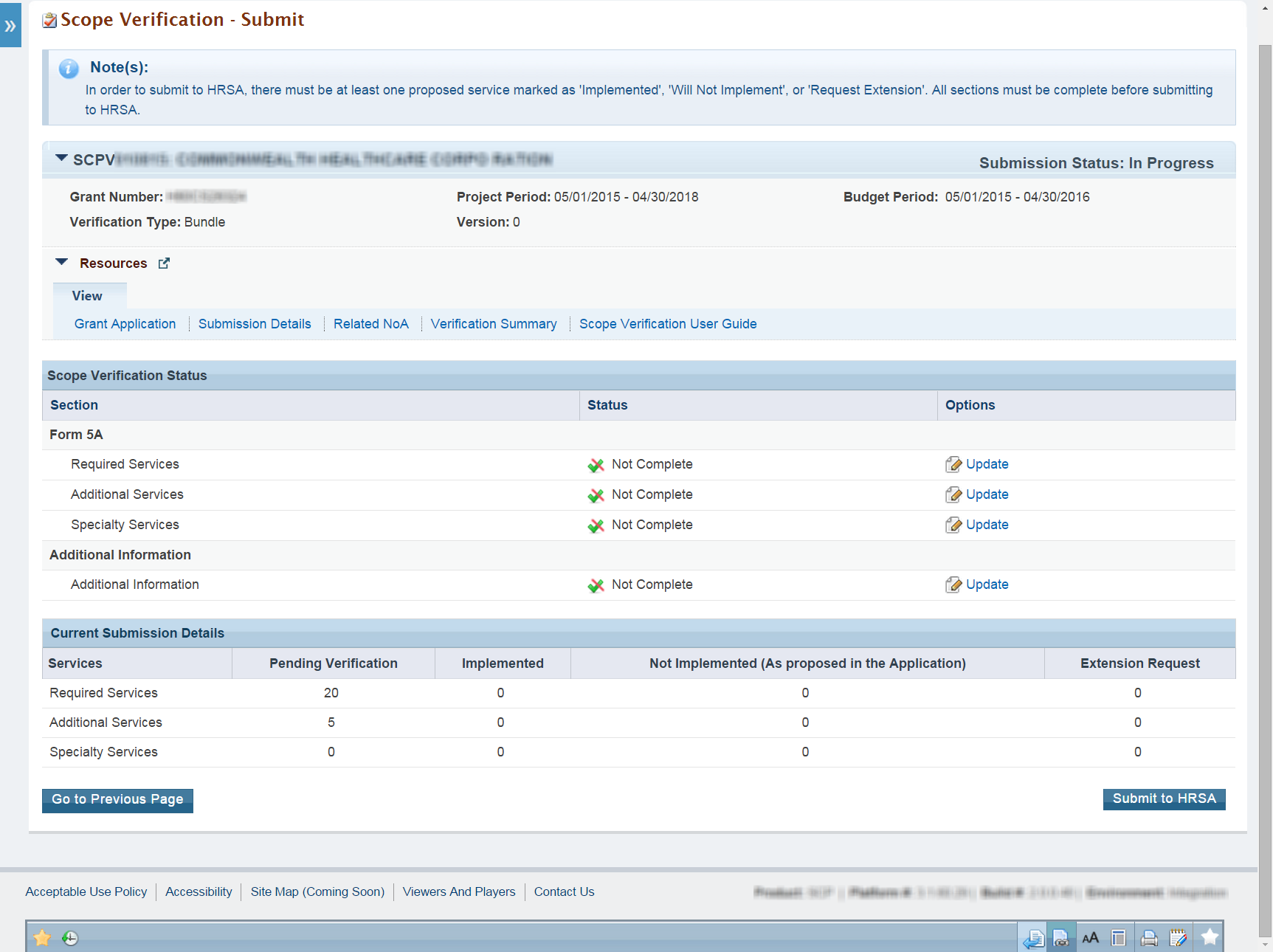
Figure 12: Review Page



The **Submit** page (refer to Figure 13), aside from allowing you to submit the submission, provides the status of each section and submission details for each **Form 5A** section. All sections must be complete in order to submit the Scope Verification. Directly navigate to each of the **Form 5A** and **Additional Information** sections by clicking the section’s respective **Update** link. The **Current Submission Details** section provides a high-level overview of the submission.

Navigate to the **Review** page by clicking the **Go to Previous Page** button. Click the **Submit to HRSA** button when the Scope Verification is ready for submission. The system will navigate to the **Review** page with a success message.

Figure 13: Submit Page



# Project Officer Requests Change

HRSA may deem it necessary to return your submission for change request. In this scenario, follow the steps in Section 5 above to navigate to the **Submissions – List** page, and open your submission as you did initially.

In order to view your project officer’s reasons for requesting a change, access your EHB-registered email account. Open the respective email and read your project officer’s comments.

Note that for Bundled Scope Verifications, you will not be able to edit records that you marked as Implemented or Not Implemented and were approved by BPHC. Services approved by BPHC are indicated by tooltip language respective to each approved service.

A Scope Verification may be returned to you more than once, based on HRSA’s review.

# Copying a Change in Scope (CIS) Request

In the case where the Scope Verification expires and is no longer available to work on, you can copy any existing CIS request that you have submitted previously. This will be useful under the following circumstances:

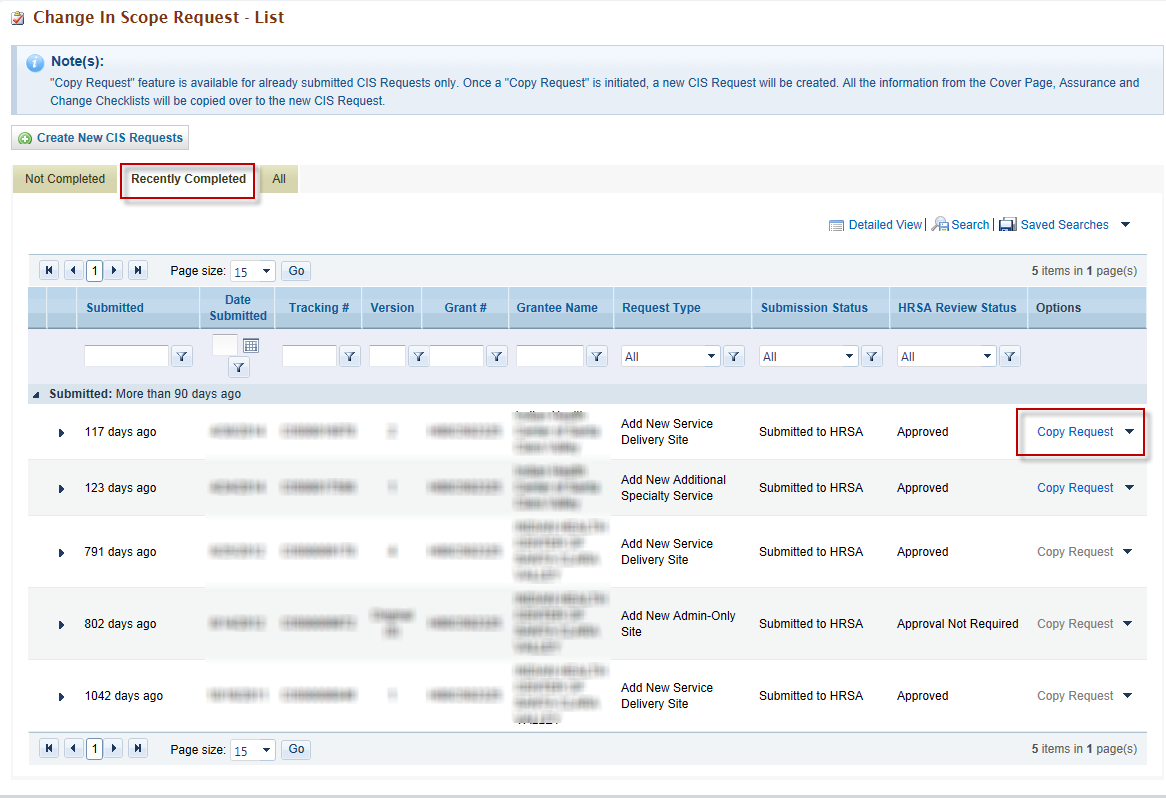
* Proposing multiple changes of the same type (e.g., adding multiple services or sites).
* Making changes to a CIS request after HRSA approves it, but before you verify the proposed change(s), is not allowed, so you will need to withdraw the CIS request and submit a new one.
* Failing to verify an approved request but still needing to make the change, so you will need to submit a new request that is the same as the original one.

Copying a CIS request makes a duplicate of the original including attachments. Data that was entered on the **Change Detail** page is not copied. Point of contact information that was entered on the **Cover Sheet** page is not copied.

To copy a CIS request (refer to Figure 14), follow these steps:

1. Click the **Tasks** tab to navigate to the **Pending Tasks – List** page, listing all the available tasks.
2. In the left hand menu, under **Grants**, click **Health Center CIS Requests** to navigate to the **Change in Scope Request – List** page.
3. Click the **Recently Completed** tab to access all the recently completed submission and click the **Copy Request** button.

Figure 14: Copy Request functionality



# Help and Support

If you have further questions please contact the BPHC Helpline. To receive assistance from the Bureau of Primary Health Care (BPHC) Helpline, please click the following link:

* <http://www.hrsa.gov/about/contact/bphc.aspx> and submit your inquiry. You may also contact the helpline directly at 1-877-974-BPHC (2742). The BPHC Helpline hours of operation are Monday – Friday 8:30 a.m. – 5:30 p.m. The BPHC Helpline is closed on all Federal holidays. Thank you for contacting us.