Welcome to OAT PIMS tutorials

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

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1 Grantee Functions in OAT PIMS

1.1 Grantee Login (How to Access and Use OAT PIMS)

Grantees will access OAT PIMS through EHB Be registered with EHB

Type the following URL on your browser and hit "Enter": https://ehbga.hrsa.gov/webexternal/login.asp

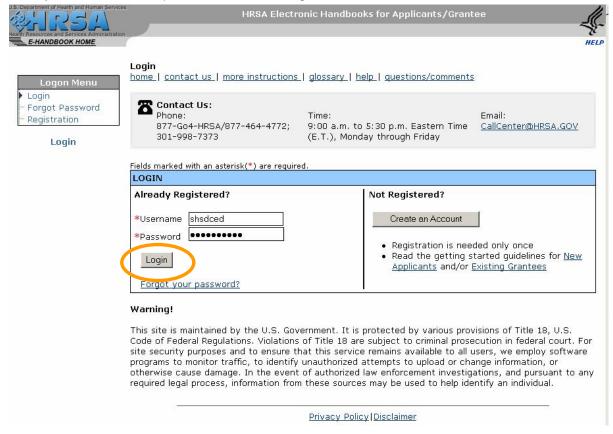
This brings up the EHB logon screen HRSA Electronic Handbooks for Applicants/Grantee E-HANDBOOK HOME home | contact us | more instructions | glossary | help | questions/comments Login Contact Us:
Phone: Forgot Password Registration 877-Go4-HRSA/877-464-4772; 9:00 a.m. to 5:30 p.m. Eastern Time CallCenter@HRSA.GOV 301-998-7373 (E.T.), Monday through Friday Login Fields marked with an asterisk(*) are required. LOGIN Already Registered? Not Registered? *Username Create an Account *Password · Registration is needed only once • Read the getting started guidelines for <u>New</u> Login Applicants and/or Existing Grantees Forgot your password? Warning!

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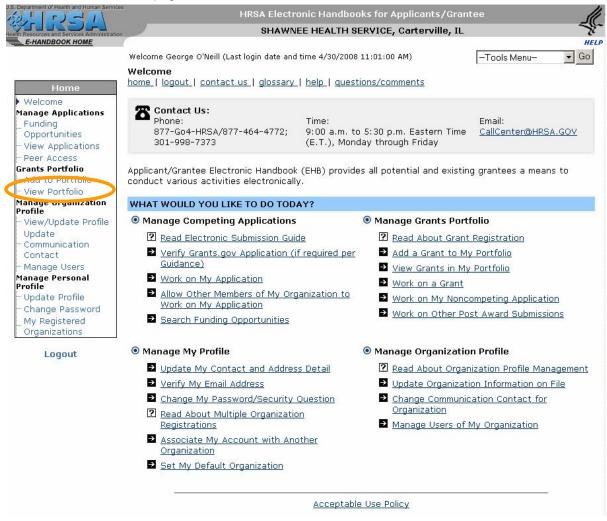
1.1.1 Username and Password

Enter your username and password and click "Login"



1.1.2 View Portfolio

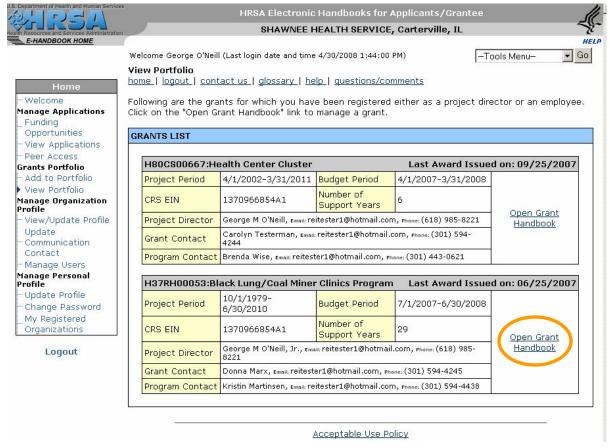
From the EHB Welcome page click 'View Portfolio" on the "Home" left hand side menu



This brings up the Grants List for the grantee

1.1.3 Open Grant Handbook

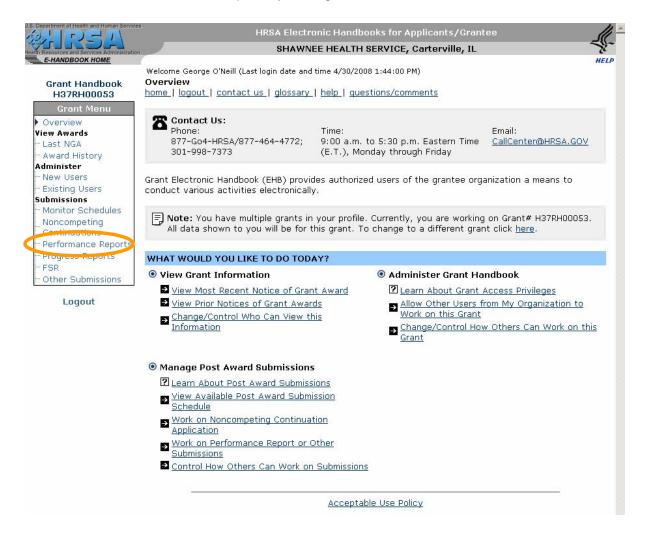
Select a grant by clicking on the "Open Grant Handbook" link on the last column of the Grants list.



This brings up the selected Grant menu.

1.1.4 Performance Reports

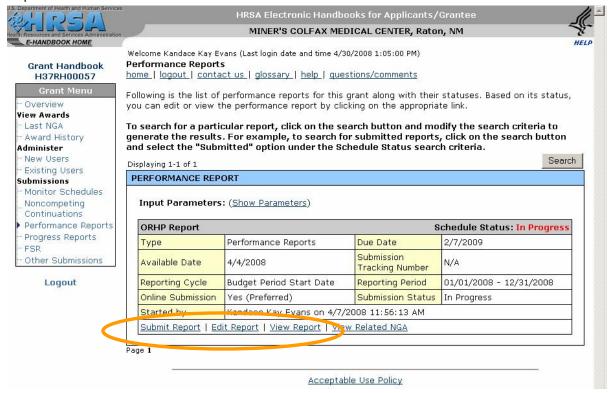
Choose to work on Performance Reports by clicking the link on the Grant menu.



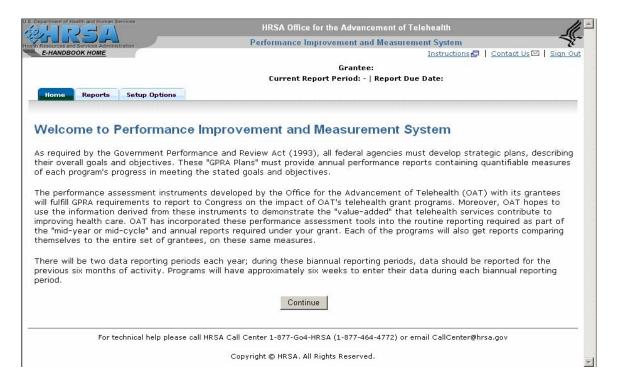
This brings up the Performance Report for the Grant.

1.1.5 Select "Performance Report" option

Select one of the first 3 options (Submit Report, Edit Report, and View Report) under "Performance Report".



1.1.6 You are redirected to OAT PIMS Welcome/Home page



- 1.2 New Report Data Collection
- 1.2.1 Repeat Instructions 1.1.1 to 1.1.4.
- 1.2.2 Select the "Start Report"

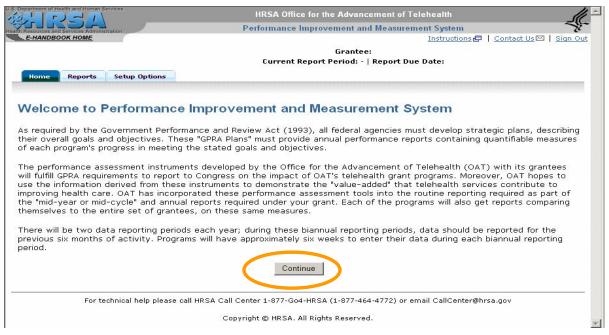
Select the "Start Report" option on the "Performance Report" menu. The report status is "Not Started"



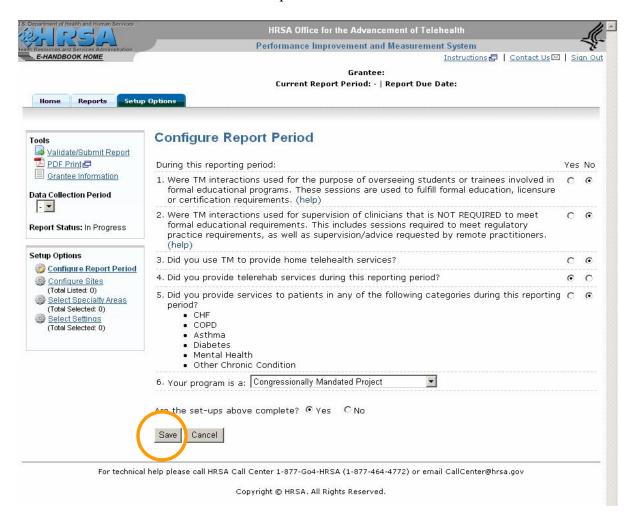
You are redirected to OAT PIMS Welcome/Home page

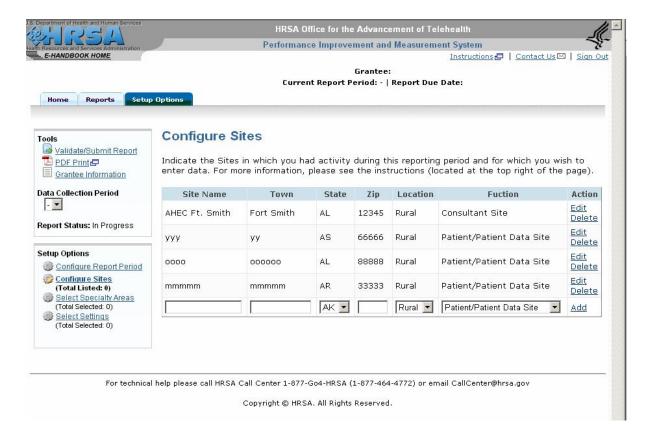
1.2.3 Launch OAT PIMS

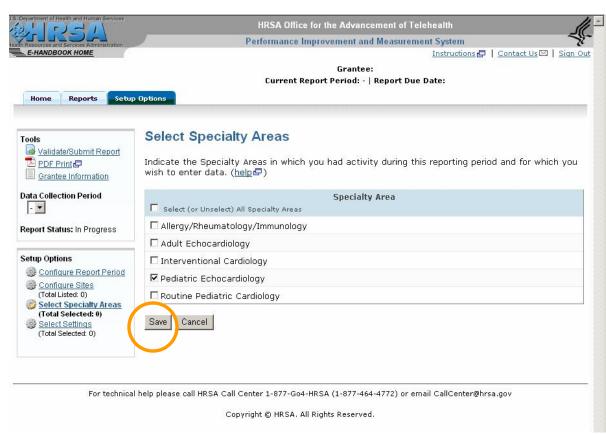
Click on "Continue" button

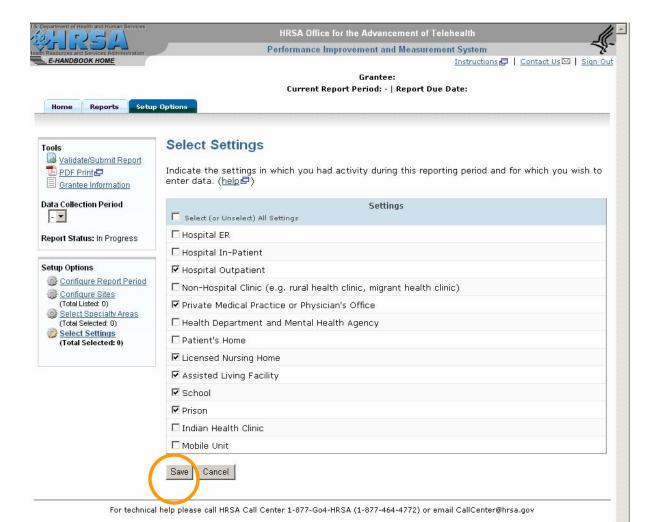


The first "Setup Options" form is brought up. Provide and save all required information on all 4 forms on this Tab then move to "Reports" Tab.







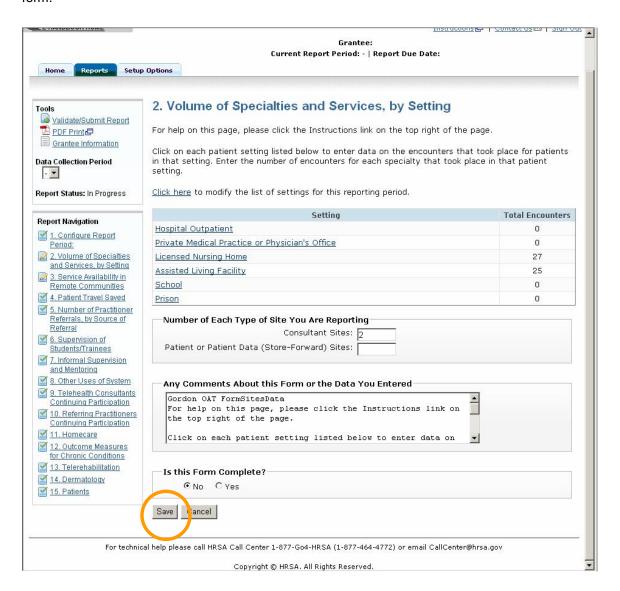


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This brings up the first not completed form. For a "Not Started" report the first not completed form is "Volume of Specialties and Services, by Setting". Grantee can select a different form by clicking the form link under "Report Navigation"

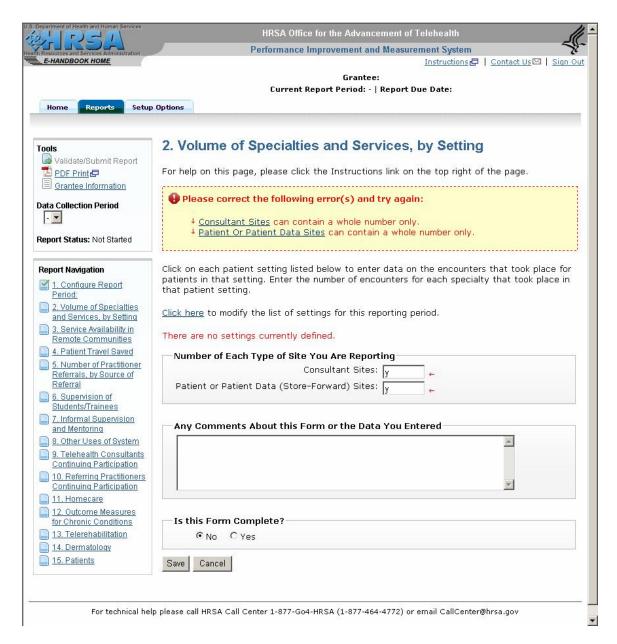
1.2.4 Form Data Entry

Enter data in form fields. If all required information is provided Grantee can choose to complete the form



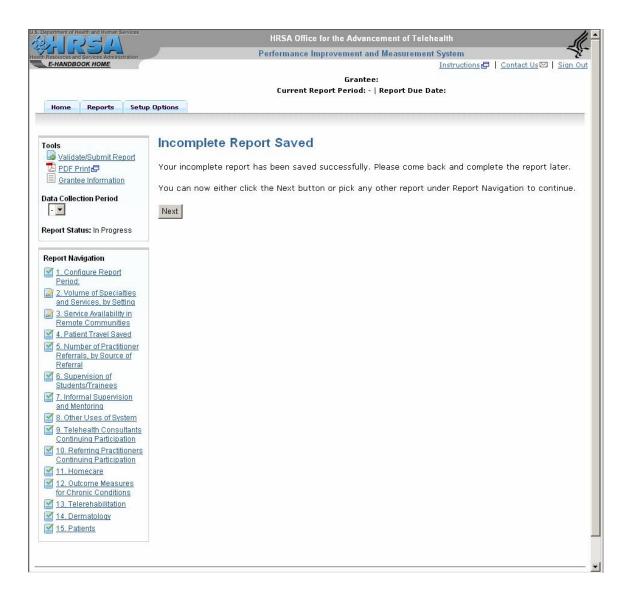
1.2.5 Save Error

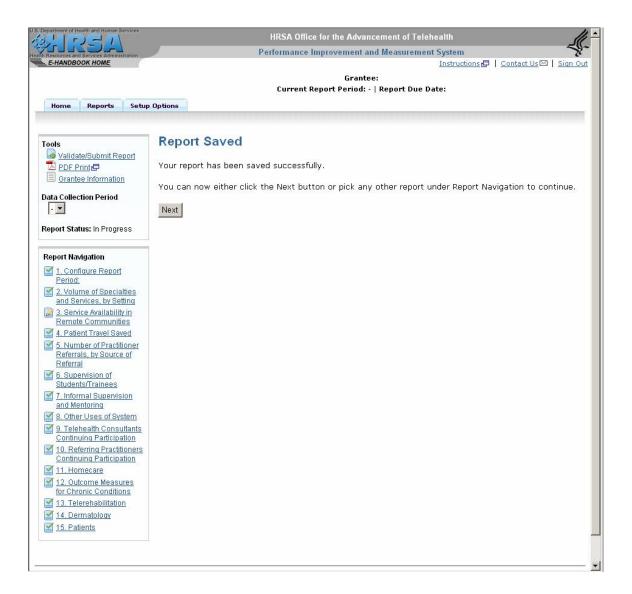
Click "Save" at the bottom of the form to write the provided information to the database. The form will not save if errors are found in the information provided, or if the grantee chooses to complete when all required information is not provided. An error message will be generated.



1.2.6 Successful Save

If the "Save" function is successful in either case (non-completed form or completed form) the grantee is prompted to either work on the next not completed form by clicking "Next" button, or to selected any other form from the "Report Navigation" menu.

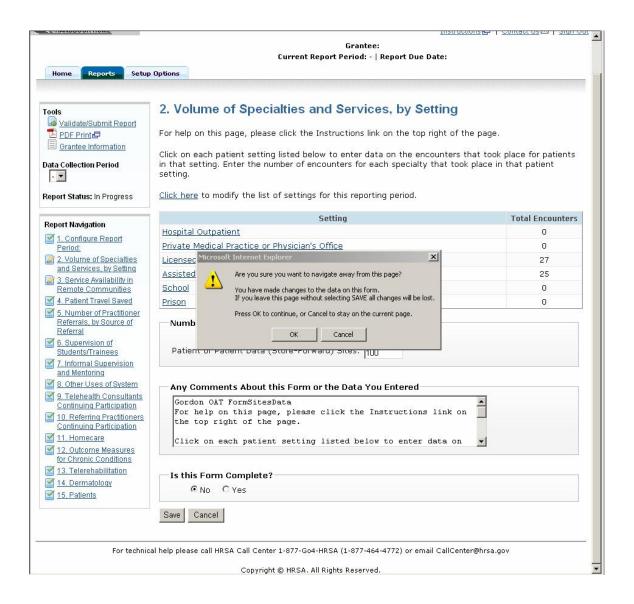




The system will prompt to save or discard changes made on a form whenever the grantee attempts to navigate away from the form without saving in the following cases:

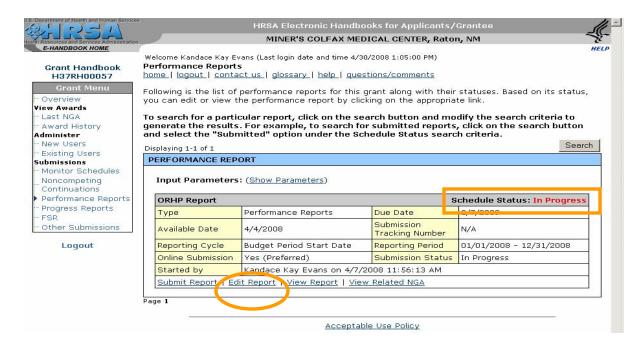
- Grantee user selects another link in the system
- Grantee user selects to navigate to another URL on the browser.
- Grantee user simply decides to close the browser.

If Grantee user chooses to save the changes he will have to select the "Cancel" button to stay on the form, then the "Save" button on the form to launch the saving process. The system will bring up the page Grantee user is trying to navigate to at the end of this process. If Grantee user chooses not to save by selecting the "ok" button all changes on the form will be lost when the page Grantee user is trying to navigate to comes up.



- 1.3 Update Report
- 1.3.1 Repeat Instructions 1.1.1 to 1.1.4.
- 1.3.2 Select "Edit Report"

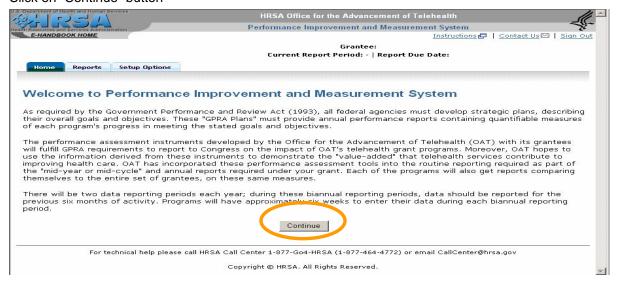
Select the "Edit Report" option on the "Performance Report" menu. The report status is "In Progress"



You are redirected to OAT PIMS Welcome/Home page

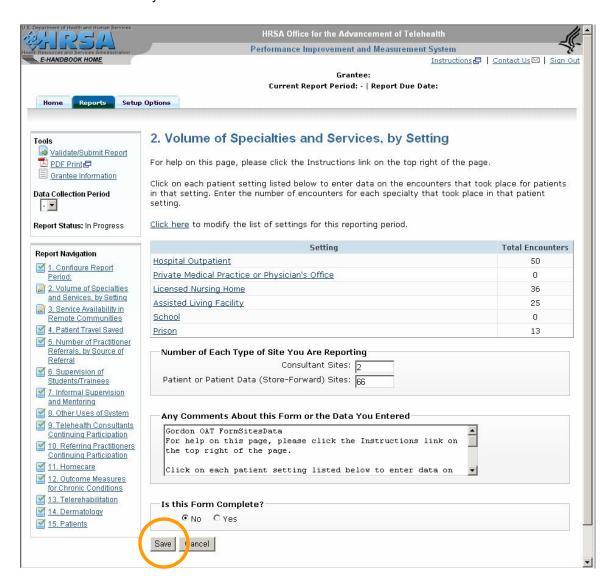
1.3.3 Launch OAT PIMS

Click on "Continue" button



This brings up the first not completed form or the "Volume of Specialties and Services, by Setting" form if all forms are completed. Grantee can select a different form to edit by clicking the form link under "Report Navigation".

1.3.4 Enter or modify data in form fields and "Save".

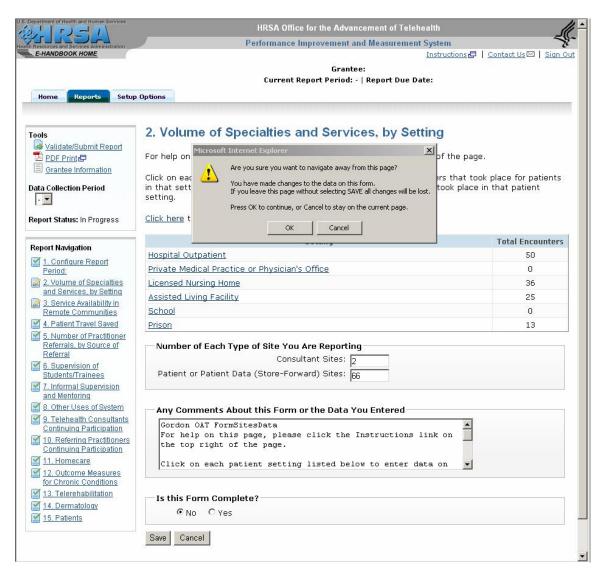


Click "Save" at the bottom of the form to write the provided information to the database. The form will not save if errors are found in the information provided, or if the grantee chooses to complete when all required information is not provided. An error message will be generated. If the "Save" function is successful the grantee is prompted to either work on the next not completed form by clicking "Next" button, or to selected any other form from the "Report Navigation" menu.

The system will prompt to save or discard changes made on a form whenever the grantee attempts to navigate away from the form without saving in the following cases:

- Grantee user selects another link in the system
- Grantee user selects to navigate to another URL on the browser.
- Grantee user simply decides to close the browser.

If Grantee user chooses to save the changes he will have to select the "Cancel" button to stay on the form, then the "Save" button on the form to launch the saving process. The system will bring up the page Grantee user is trying to navigate to at the end of this process. If Grantee user chooses not to save by selecting the "ok" button all changes on the form will be lost when the page Grantee user is trying to navigate to comes up.



1.4 Complete Data Form

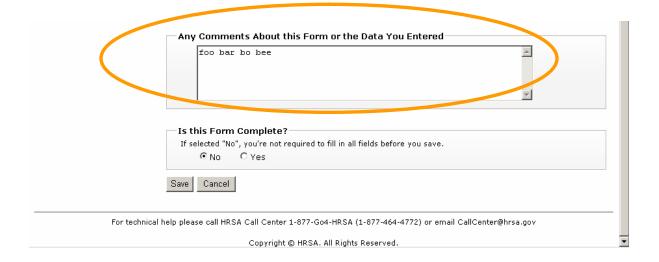
"Is This Form Complete" The Grantee is asked to respond by "Yes" or "No" to this question at the bottom of each form.

Select "Yes" only when all required information is provided. "No" is the default value.



1.5 Add Comments to Data Form

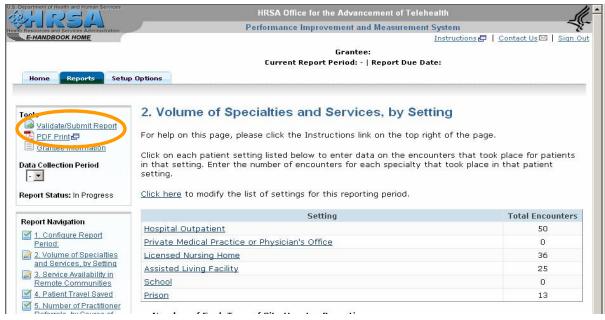
A text area is provided at the bottom section of each from where Grantee can actually type comments up to 5000 characters. This information will be saved in the database for further use.



1.6 Validate and/or Submit Report

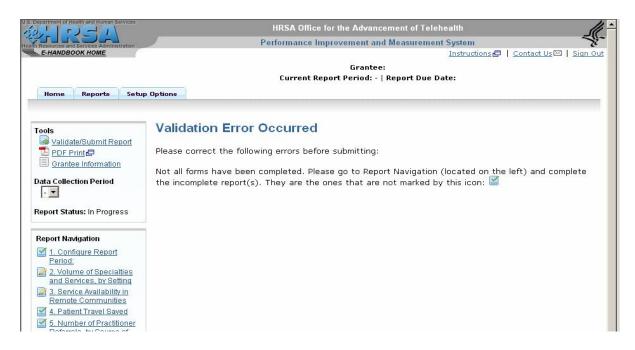
1.6.1 Validate Report

At any time Grantee can choose to run validation rules against the already provided information by clicking the "Validate/Submit Report" link under Tools menu if already logged in the system, or by selecting the "Submit Report" link from EHB.



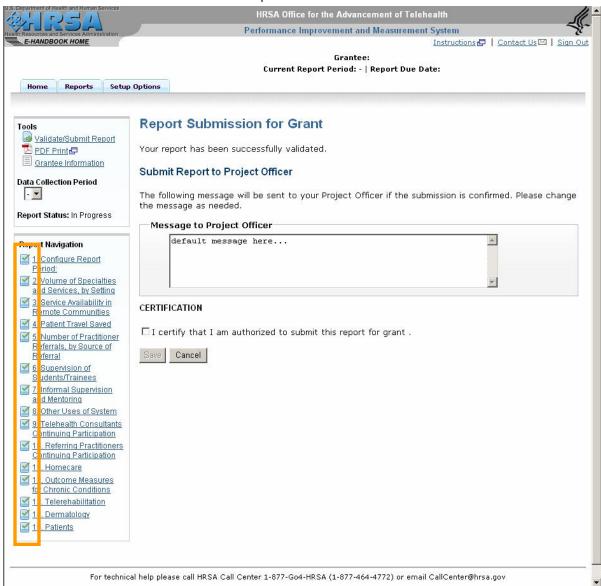
1.6.2 Validation Error

If there are validation issues a message with the list of errors and warnings is generated. Those have to be fixed in order to successfully validate the report.



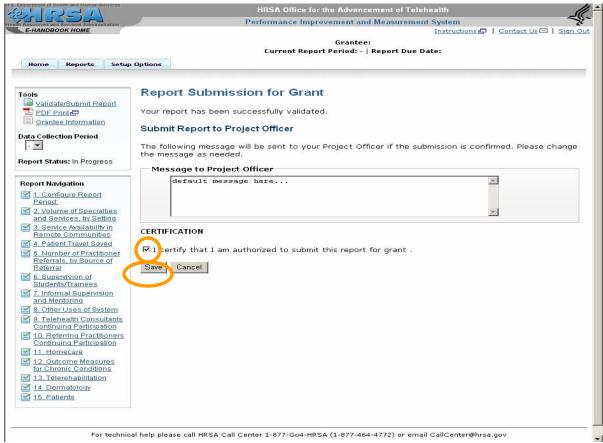
1.6.3 Successful Validation

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



1.6.4 Submit Report

Click "Submit" or "Save" after selecting the Certification check box and adding a message to be emailed to the project officer to complete the submission.



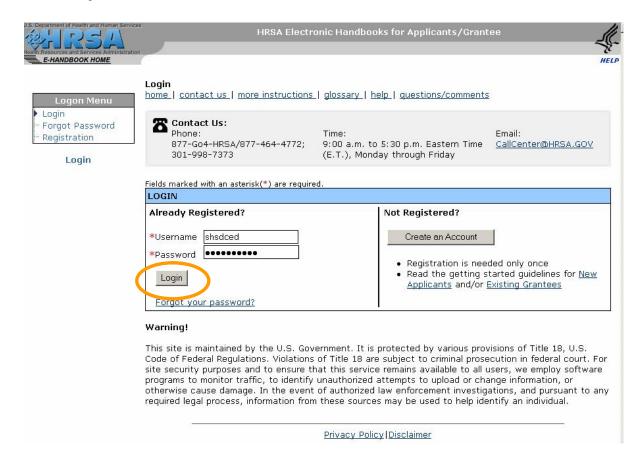
1.6.5 Report Submission Confirmation

A confirmation message is generated with a confirmation number for the submission.



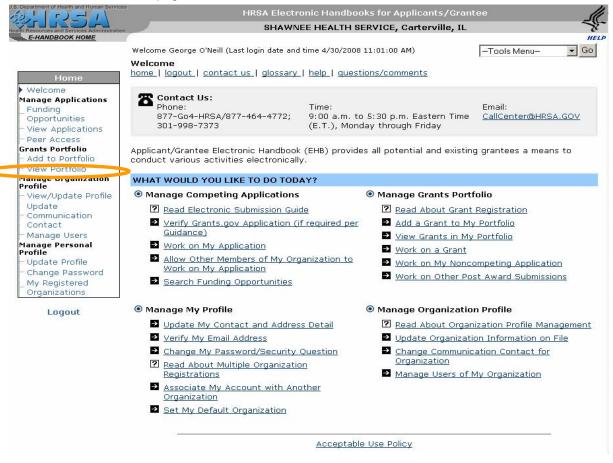
1.7 View Submitted Report

1.7.1 Login to OAT PIMS

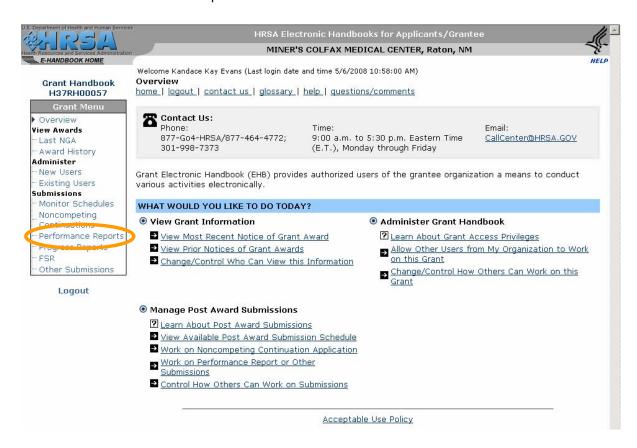


1.7.2 View Portfolio

From the EHB Welcome page click 'View Portfolio" on the "Home" left hand side menu

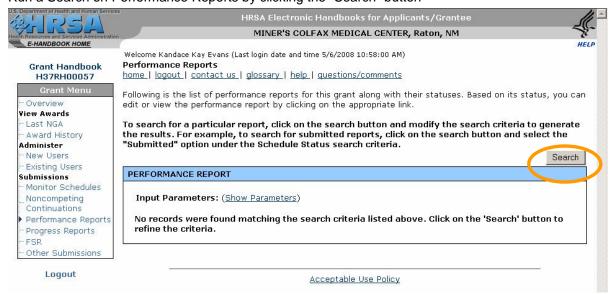


1.7.3 Select "Performance Reports"



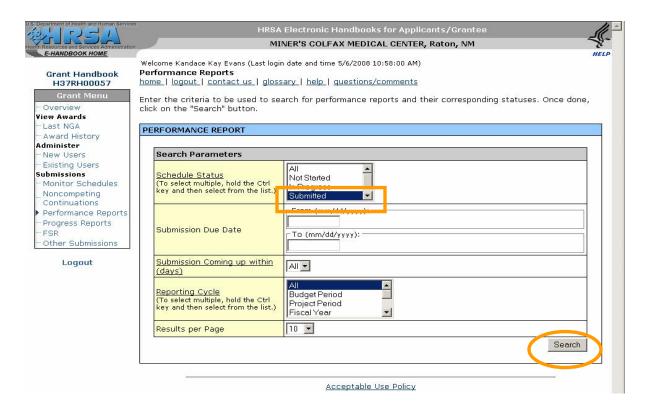
1.7.4 Search on Performance Reports

Run a Search on Performance Reports by clicking the "Search" button

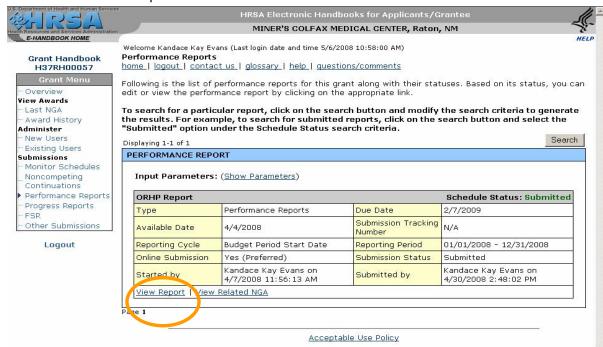


1.7.5 Search Criteria

Select "Submitted" status on the Schedule status search parameter and click "Search button"



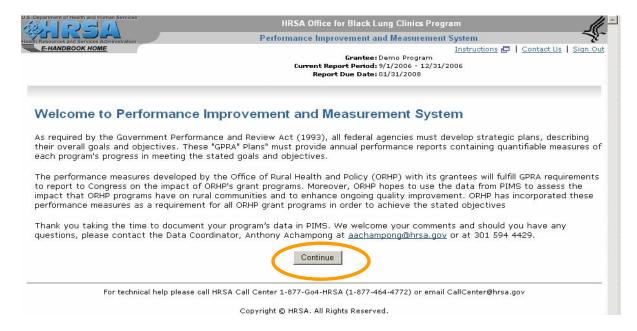
1.7.6 Select "View Report" link



You are redirected to OAT PIMS Home/Welcome page.

1.7.7 Launch OAT PIMS

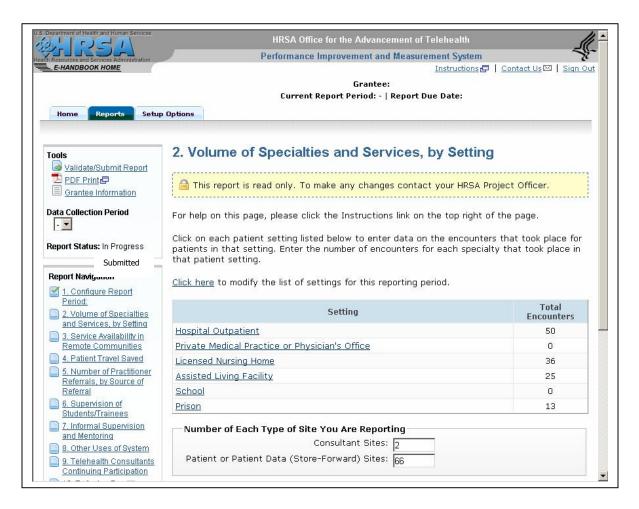
From the OAT PIMS Home/Welcome page click on "Continue" button



This brings up a read-only version of the first completed form, in this case "Volume of Specialties and Services, by Setting".

1.7.8 View Report

You can select a different form to view by clicking the form link under "Report Navigation" menu. Notice that "Save" and "Cancel" buttons are both disabled.

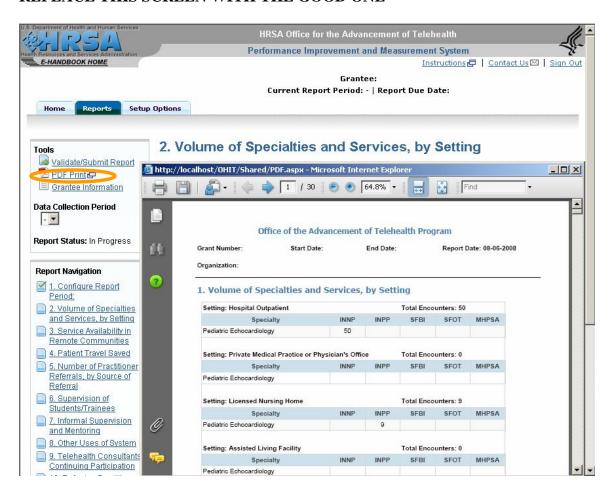


1.8 Save Report on Local Machine/ Print PDF

At any time Grantees can generate a PDF version of their report by clicking "PDF Print" link from Tools menu.

From the Adobe "File" menu select "Save a copy"

REPLACE THIS SCREEN WITH THE GOOD ONE

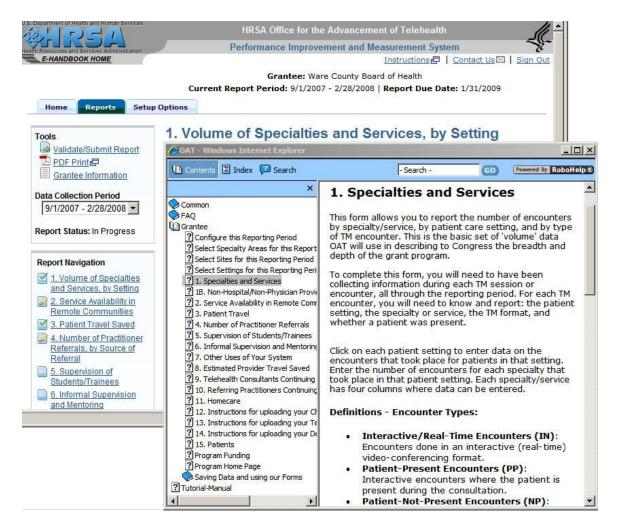


1.9 Help

The OAT PIMS Web online help can be used to assist users with creating, editing, and submitting reports.

1.9.1 Help on Current Page

At any step of any process click "Instructions" link at the top right of the page. A popup screen comes up with information on the active page.



1.9.2 Help on Other pages or topics

User can also navigate within the Help looking for information on other pages or other processes.

