



**HEALTH RESOURCES AND
SERVICES ADMINISTRATION**
ENTERPRISE PROJECT LIFECYCLE FRAMEWORK



Enterprise Project Lifecycle

Change In Scope (CIS) Phase II

CIS Submission User Guide

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1. Introduction

1.1. Document Purpose and Scope

The purpose of this document is to provide detailed instructions to Health Centers to submit the Change in Scope (CIS) requests electronically to BPHC through HRSA Electronic Handbooks (EHBs). The document is intended to be the comprehensive source of all information related to the electronic processes that BPHC and its Health Center program participants have to follow and will be updated periodically.

This document does not replace the Policy Information Notice (PIN) document for CIS requests and health centers should follow the PIN for all programmatic questions.

1.2. Document Organization and Version Control

This document contains following sections apart from the Introduction. Following is the summary:

Section	Description
Change in Scope (CIS) Process	Provides detailed instructions to existing Health centers for submitting CIS requests electronically using HRSA EHBs.
General Instructions for CIS Application Submission	Provides instructions and important policy guidance on application format requirements.
Reviewing the CIS Request	Provides instructions to review the CIS Request before submission.
Submitting CIS Request	Provides instructions to submit the CIS Request.
Grantee Self- Updates	Provides instructions to complete the self- update attributes.
Support and Contact	Provides contact information to address technical and programmatic questions.
Frequently Asked Questions (FAQs)	Provides answers to frequently asked questions.

Table 1: User Guide Sections

2. Change in Scope Process

2.1. Overview of Changes to CIS Submission Module

2.1.1. Key Changes effective July 2014

- HRSA updated Form 5A: Services Provided and Form 5B: Service Sites to facilitate more accurate, simplified data entry for health centers, including streamlining and enhancing the forms with interactive descriptors for each data field. The following are the updates to each form:
 - Form 5A:
 - **List of services:** Where appropriate, on Form 5A, HRSA updated terminology, added new fields, renamed services, and consolidated service subcategories, combining them into a single service. Refer to the [PAL 2014-06](#) for additional details.
 - **Service delivery method descriptors:** Added a resource document that describes the service delivery methods in greater detail in order to guide health centers in determining which service delivery column(s) should be marked for each service on Form 5A. Refer to [Form 5A Column Descriptors](#) for more details.
 - **Service descriptors:** Added a resource document that describes all Required Services included in the Health Center Program's authorizing statute and program regulations, as well as a small menu of Additional Services. Refer to [5A Service Descriptors](#) for more details.
 - Form 5B:
 - HRSA restructured the form to eliminate redundant and/or unnecessary fields and developed accompanying [Form 5B instructions](#) to assist in the accurate recording of a health center's scope of project.
 - Added a new required field 'FQHC Site Medicare Billing Number Status' and an optional field 'FQHC Site National Provider Identification (NPI) Number'. Please note that this number should be unique to each site in your Scope.
 - Other significant changes to the form 5B fields:
 - Site Setting:
 - The 'Tribal' Site setting is not a supported option going forward and all sites that had previously chosen the 'Tribal' Site Setting shall be automatically defaulted to 'All Other Clinic Types.' You may modify it as required.
 - New sites and sites that were previously operating with other site settings will not be able to choose 'Nursing home' or 'Correctional facility' going forward. Existing sites that use these site settings can continue to operate as such.
 - 'FQHC Site Medicare Billing Number' now needs to be unique to each site in your Scope.
 - Updates to the following two fields are not permitted:
 - 'Date Site was Added to Scope': The field is pre-populated with the PAO approval date, once available.
 - 'Site Operational Date':
 - For 330 grants:

- The field is pre-populated with the date verified upon successful verification, once available.
 - For all Monitored CIS and Admin initiated formal site/service requests, the field is pre-populated with the 'Date Site was Added to Scope.'
 - When the verification date is unavailable, the system shall default the date to 'Date Site was Added to Scope'
 - For Look-Alikes: The field is pre-populated with the 'Date Site was Added to Scope'
- Health Centers will be required to provide 'Supporting documents' for the following CIS requests:
- 5B "Update PO Monitored Attributes"
 - 5A "Update Required Services"
 - 5A "Update Additional Services"
- The business rule for 'Substance Abuse Service' has been updated:
- Health Centers servicing target population 330(h) must provide 'HCH Required Substance Abuse Services'.
 - Health Centers not servicing target population 330 (h) may only provide 'Substance Abuse Services' as an Additional service, if applicable.

The system will modify the provision of the Required and Additional 'Substance Abuse Services' accordingly for Health Centers making changes to their target population. For instance, when a Health center previously not serving 330(h) and providing the Additional 'Substance Abuse Service' adds the 330(h) target population, the system will switch the Additional 'Substance Abuse Service' to the 'HCH Required Substance Abuse Service'. When a Health center previously not serving 330(h) and NOT providing the 'Additional 'Substance Abuse Service' adds the 330(h) target population, the system will mark the 'HCH Required Substance Abuse Service' as missing.

2.1.2. Key changes effective 2013

- **Scope Verification** – All approved Formal CIS requests, except "Addition of Target Population", will require verification.
 - **Restrictions for Older CIS Requests** – The Health Centers will no longer be able to copy older CIS Requests created prior to January 2013.
 - Enhanced Cover page and Checklists.
 - Deletion of the 'Change Requested' CIS is disabled; you may request to withdraw.
 - CIS requests created using the older checklists are unavailable to edit, copy, withdraw, and delete.
 - Following are the key features of the new user interface:
1. **Grant Information and Resource section:**
- The new user interface displays the grant information and resources information in each section to provide easy access to this information.

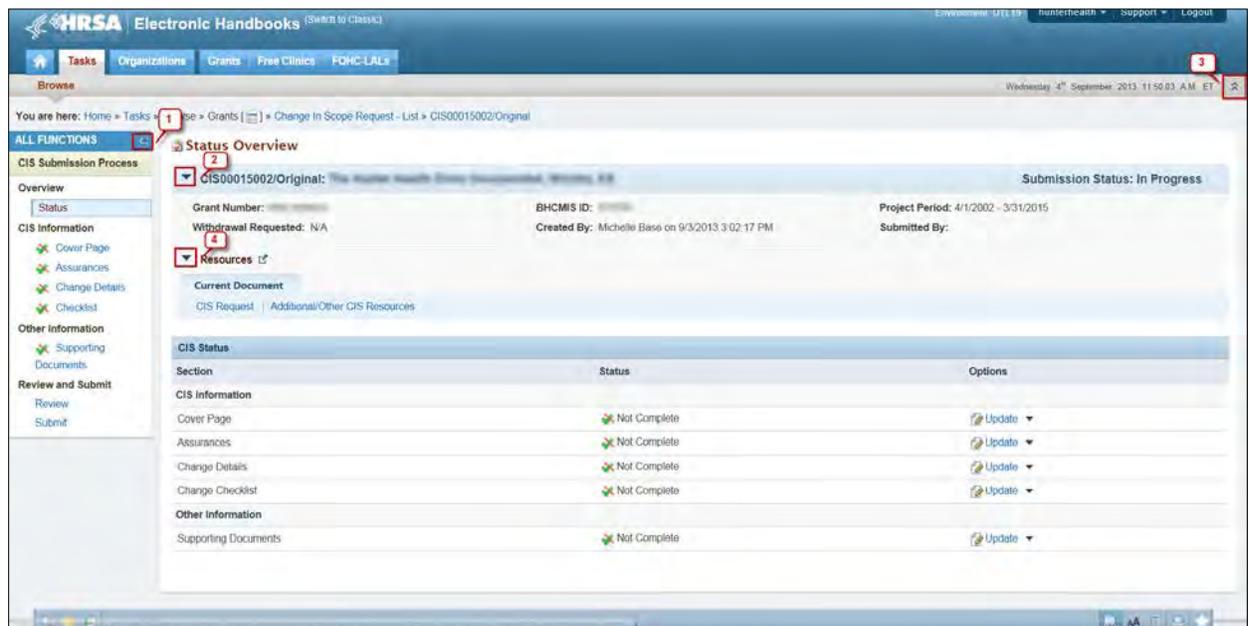
Figure 1: Status Overview page - Sections



2. Collapsible and Expandable sections:

There is a new feature in the new interface, which allows you to collapse the left menu (1), grant information section (2), the header section (3 on the right top corner) and the resources section (4) to avoid the horizontal and vertical scroll.

Figure 2: Collapsible and Expandable Sections



3. Breadcrumbs:

Breadcrumbs at the top of each page trace the path for the current page you are accessing. You can click on the text in blue to go back to a particular page.

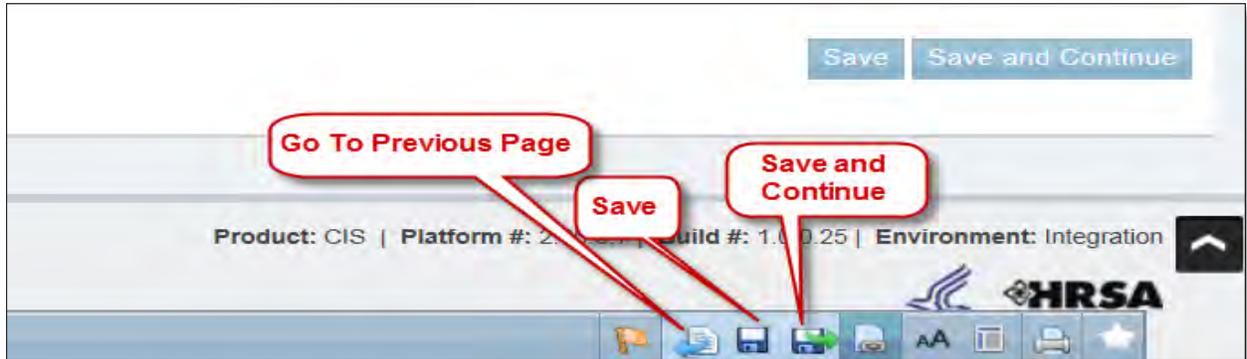
Figure 3: Breadcrumbs



4. **Bottom tool bar:**

New user interface provides quick access to the **Save**, **Save and Continue** and **Go to Previous page** buttons through the bottom tool bar.

Figure 4: Page Actions in Bottom toolbar



5. **Useful Links** – CIS Request type selection page and Cover Page provides the following useful links to Health Centers:

- **View Next Step** – This link displays the read-only page of the corresponding evaluation page for each Formal CIS request type. This helps Health Centers be aware of the options available and/or the pre-defined criteria needed to propose changes to their Scope.
- **View Printable Preview** – This link displays a Word Document that contains instructions and system screen shots of the expected page flow for each Formal CIS request type. This helps the Health Centers prepare the responses and supporting information required to complete the CIS Request.
- **View Allowable Updates** - This link displays a pop-up window with the updates you can perform for the formal CIS request you have selected.

Figure 5: Useful Links for Formal CIS Options



2.2. Process Overview

BPHC Health Center program participants use the Change in Scope process to request approval for changes to their scope of project. A Formal Change in Scope request is required for significant changes, such as adding or deleting a required service or opening or closing a service delivery site. (3.3.4 - 3.3.11)

For other changes such as changing the Site Setting or Location Type, a Monitored CIS request may be used. Monitored CIS requests are reviewed by Project Officers but do not result in an NoA. ([0 - 3.3.3](#))

Finally, Health centers can update certain site-related information directly through the Self-update module. You do not need to create a CIS request for this type of change. ([Self-Update](#))

Following is the process for submitting a CIS request through the HRSA EHBs:

1. The project director and authorizing official must register with HRSA EHBs (if not already registered) ([0 Health Center User Registration](#)).
2. Read all documentation related to the CIS process including PIN, FAQs, and this submission guide.
3. Complete the evaluation steps in HRSA EHBs to determine if you need to create a CIS request. ([2.4 Evaluate CIS Need](#)).
4. If a CIS request is necessary, prepare the CIS application through HRSA EHBs ([3 General Instructions for Competing the CIS Request](#)).
5. Once the CIS request is complete, submit it electronically through the HRSA EHBs ([5 Submitting CIS Request](#)).
6. HRSA Project Officer (PO) will receive the CIS request and validate it for completeness. If the CIS request is incomplete, HRSA may request a change from the health center. For monitored CIS requests, HRSA may request that the health center submit a full CIS.
7. When HRSA has completed its internal processing, the Health centers will receive either a Notice of Award (NoA) or a disapproval email depending on the decision (for formal CIS requests). The system sends these notifications to the project director and the point of contact for the CIS request.

Health Center User Registration

In order to submit the CIS request in HRSA EHBs, existing Health Center users must register within the EHBs. The purpose of the registration process is to collect consistent information from all users, avoid collection of redundant information, and allow for the unique identification of each system user. Note that registration within HRSA EHBs is required only once for each user. HRSA EHBs allow the user to use his/her single username and associate it with more than one organization.

Registration within HRSA EHBs is a two-step process.

1. Individual users from an organization who participate in the grants process such as applying for noncompeting continuations must create individual system accounts. Users must associate themselves with the appropriate organization. To find your organization record, use the 10-digit grant or Look-Alike number from the Notice of Award (NoA) /Notice of Look-Alike Designation (NLD). Note that since all existing health center organization records already exist within EHBs, there is no need to create a new one. To complete the registration quickly and efficiently we recommend that you have the following information handy:

Your role in EHBs, HRSA EHBs offer the following three functional roles for individuals from applicant organizations:

- Authorizing Official (AO), Business Official (BO), and Other Employee (for project directors, assistant staff, AO designees, and others).
- 10-digit grant or Look-Alike number from the latest NoA/NLD

You must use the grant or Look-Alike number to find your organization during registration. All individuals from the organization working on the grant must use the same grant/Look-Alike number to ensure correct registration.

2. In order to access the grant folder or Look-Alike handbook, the project director and other participants have to register the specific grant or Look-Alike portfolio and add it to their respective

portfolios. This step is required to ensure that only the authorized individuals from the organization have access to the data. Project directors will need the last released NoA in order to complete this additional step. Again, note that this is a one-time requirement.

The project director must give the necessary privileges to the authorizing official and other individuals who will assist in the CIS submission process using the administer feature in the grant folder/Look-Alike handbook. For more information on functional responsibilities, refer to the HRSA EHBs online help.

For assistance in registering with HRSA EHBs, call 877-GO4-HRSA (877-464-4772) between 9:00 am to 5:30 pm ET or email callcenter@hrsa.gov.

You must use your 10-digit grant/Look-Alike number to identify your organization.

2.3. Apply through HRSA EHBs

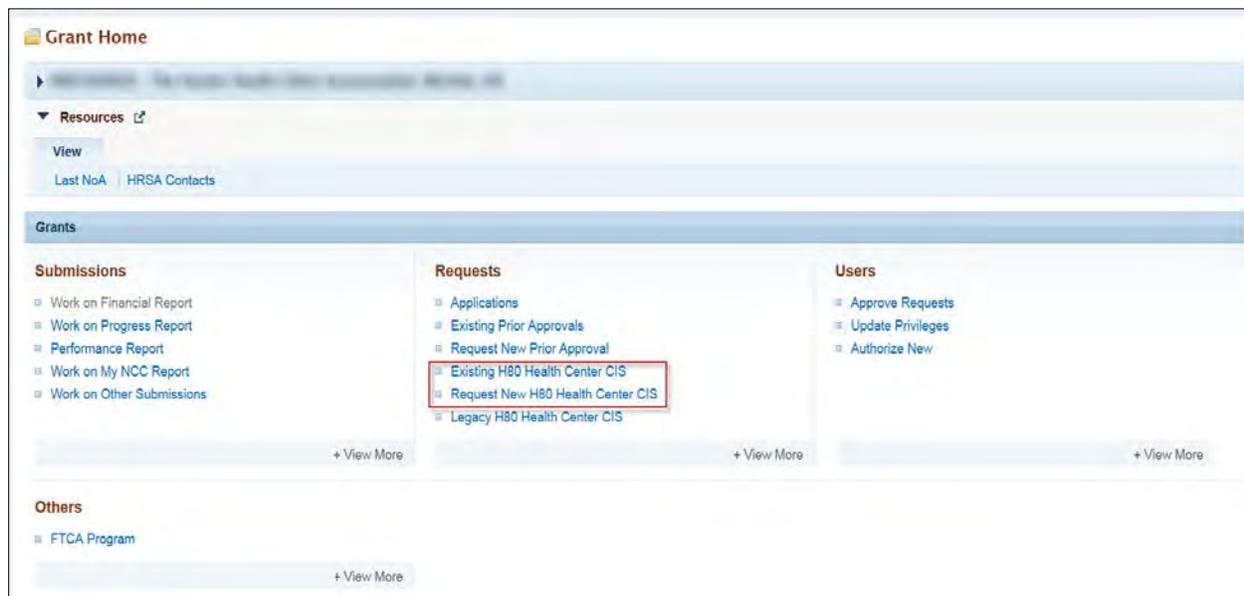
General Instructions to Use the CIS Function

To access the CIS function you must be a registered HRSA EHBs user and must have added the grant/designation to your portfolio. ([2.4 Apply through HRSA EHBs](#))

Below are the steps that grantees need to follow to create a CIS request:

- a) Login to EHBs.
- b) Navigate to the Grants tab.
- c) From the list of grants, click on [Grant Folder](#) link for the Health Center Cluster grant.
- d) Once in the Grant Folder, you will see the following link in the Requests section:
 - [Existing H80 Health Center CIS](#)
 - [Request New H80 Health Center CIS](#)

Figure 6: Grant Home Page



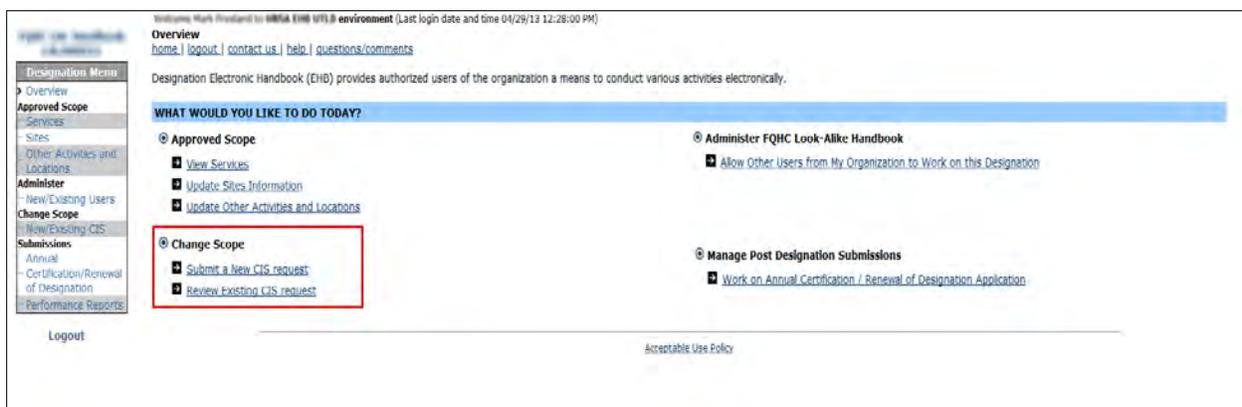
- e) Click on the appropriate link to get to the CIS section.

- f) The system navigates you to the **Change In Scope - List** page, you can edit or view the status of existing CIS requests, as well as create new CIS requests.

Below are the steps that Look-Alikes need to follow to create a CIS request:

- a) Login to EHBs.
- b) Navigate to the FQHC-LALs tab.
- c) Click the **FQHC-LAL Home** link.
- d) Click the **View Portfolio** link, from the left hand side menu.
- e) Open the desired Designation Handbook.

Figure 7: Designation Home Page



Once in the Designation Handbook, you will see the following link in the Requests section:

- **Submit a New CIS Request**
- **Review Existing CIS Request**

Click on the appropriate link to get to the CIS section.

From here, you can edit or view the status of existing CIS requests, as well as create new CIS requests.

2.3.1. Manage Access to CIS Function

You can manage access to CIS function by providing required privileges to the users. The purpose of these privileges is to control the tasks the user can perform. Project Directors (PD) have all of these privileges by default and they can manage the access for other users. For example, a PD may want to allow a subordinate to create and edit the CIS request, but not allow him/her to submit it. This way the CIS request can be created in a collaborative manner and be reviewed appropriately before authorized users submit it.

The following steps describe how to manage access to CIS function for both Section 330 Grantees and Look-Alike Organizations.

Section 330 Grantees:

1. Login to EHBs.
2. Navigate to the Grants tab.
3. From the list of grants, click on **Grant Folder** link for the desired Health Center Cluster grant.
4. Navigate to the 'Users' section on the Left Hand Side menu.

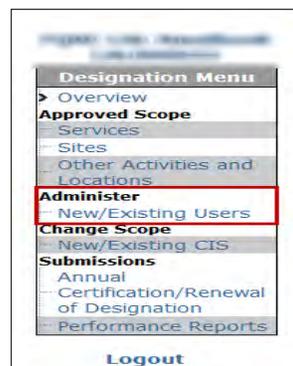
Figure 8: Left Navigation Menu - Grants



FQHC-LAL Organizations:

1. Login to EHBs.
2. Navigate to the FQHC-LALs tab.
3. From the list of Organizations, click on [FQHC-LAL Home](#) link for the desired Organizations.
4. Click on [View Portfolio](#) link from the left hand side menu.
5. Open the desired Designation Handbook.
6. Navigate to the “New/Existing Users” under Administer on the Left Hand Side menu.
7. The following page will allow you to manage the privileges required for CIS.

Figure 9: Left Navigation Menu - Look-alikes



There are four privileges related to CIS:

Privilege	Permissions
Create CIS Request	Allows the user to create CIS requests for this grant
View CIS Request	Allows the user to view CIS requests already in the grant portfolio
Edit CIS Request	Allows the user to work on CIS requests already in the grant portfolio
Submit CIS Request	Allows the user to submit CIS requests to HRSA for this grant

Table 2: CIS Permissions

Some privileges are required before other privileges. Below is a matrix showing these requirements.

Desired Privilege	Dependent Privilege			
	View	Edit	Create	Submit
View	N/A	-	-	-
Edit	Required	N/A	-	-
Create	Required	Required	N/A	-
Submit	Required	Required	-	N/A

Table 3: CIS Privilege Matrix

Using the above table, for each privilege, go across the matrix to note which privileges are required to have that privilege.

2.4. Evaluate CIS Need

Change In Scope requests is done for the following reasons but not limited to:

- Updating additional or required services (5A attributes)
- Adding a new service
- Deleting a service
- Adding new site
- Deleting a site
- Update PO Monitored (5B) attributes
- Updating Other (5C) attributes
- Replacing sites and
- Adding Target population type

To ensure that you only submit qualified CIS requests electronically through the HRSA EHBs, the system displays the list of request types on the **CIS Request Type – Select** page. On this page, the Health Centers can choose the CIS request type options when they first come in to create a new CIS request. Based on the selection, the system navigates to an intermediate page to complete the CIS request. Details on creating CIS request, completing, and submitting the CIS request to HRSA are provided below.

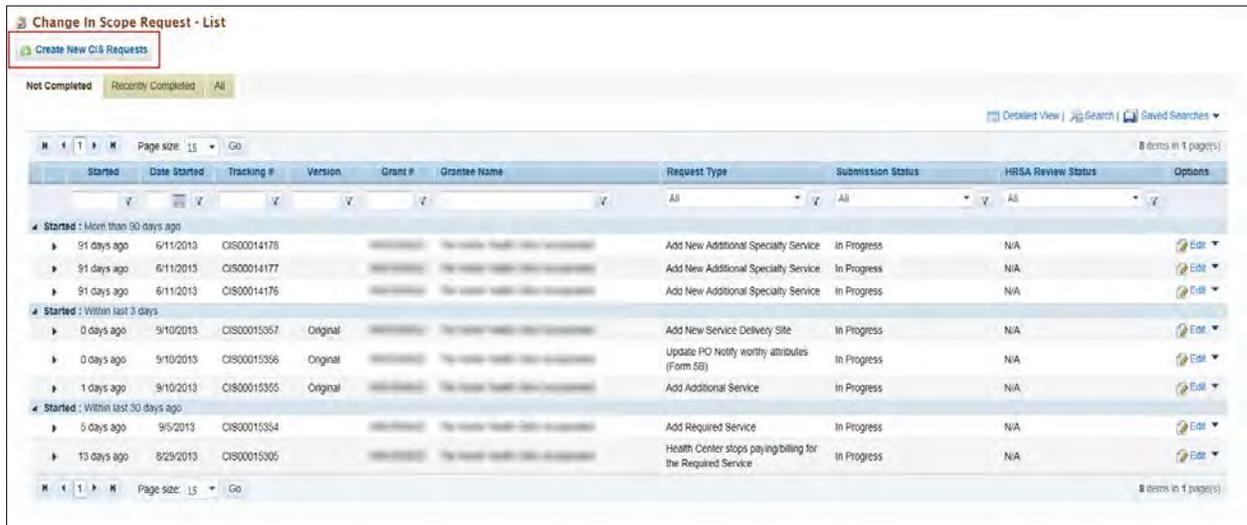
2.4.1. Creating a CIS Request

- a) To Create a CIS request, click the **Create New CIS Request** button on the Change In Scope – List page.
- The system navigates to the **CIS Request Type – Select** Page.
- b) On the **CIS Request Type – Select** page, select the desired request type.
- c) If you select the CIS request type under the **Monitored CIS Options** section, you may choose an option under the 5A attributes, 5B attributes, or 5C attributes, by selecting a radio button.
- After making the appropriate selection on the **CIS Request Type – Select** page the system will navigate to **Monitored CIS Request Create - Confirm** page. The system displays the CIS tracking number in the success message and navigates to the **Status Overview** Page.
- d) If you select the CIS request type under the Formal CIS Options section, you may choose an option under this section, by selecting a radio button.
- After selecting the appropriate CIS type, click the **Save and Continue** button, the system navigates to the **Change in Scope – Evaluate** page.

The **Change in Scope – Evaluate** page changes based on your selection of CIS request type under the Formal CIS Options section.

- e) On the **Change in Scope – Evaluate** page, click the **Create New CIS** button to create a new CIS request. The system navigates to the **Status Overview** page.

Figure 10: Change In Scope Request – List page



Started	Date Started	Tracking #	Version	Grant #	Grantee Name	Request Type	Submission Status	HRSA Review Status	Options
Started : More than 90 days ago									
91 days ago	6/11/2013	CIS00014178			The United States Health Care Resources	Add New Additional Specialty Service	In Progress	N/A	Edit
91 days ago	6/11/2013	CIS00014177			The United States Health Care Resources	Add New Additional Specialty Service	In Progress	N/A	Edit
91 days ago	6/11/2013	CIS00014176			The United States Health Care Resources	Add New Additional Specialty Service	In Progress	N/A	Edit
Started : Within last 3 days									
0 days ago	9/10/2013	CIS00015357	Original		The United States Health Care Resources	Add New Service Delivery Site	In Progress	N/A	Edit
0 days ago	9/10/2013	CIS00015356	Original		The United States Health Care Resources	Update PO Notify worthy attributes (Form 5B)	In Progress	N/A	Edit
1 days ago	9/10/2013	CIS00015355	Original		The United States Health Care Resources	Add Additional Service	In Progress	N/A	Edit
Started : Within last 90 days ago									
5 days ago	9/5/2013	CIS00015354			The United States Health Care Resources	Add Required Service	In Progress	N/A	Edit
13 days ago	8/29/2013	CIS00015305			The United States Health Care Resources	Health Center stops paying/billing for the Required Service	In Progress	N/A	Edit

2.4.2. Confirmation Page - Monitored CIS Request Type.

On selecting one of the options from Monitored CIS list and clicking the **Save and Continue** button.

- The system navigates to the **Monitored CIS Request Create - Confirm** page, click the **Confirm** button to create a CIS Request. The system navigates to the **Status Overview** page.

Figure 11: Monitored CIS Request Create – Confirmation Page



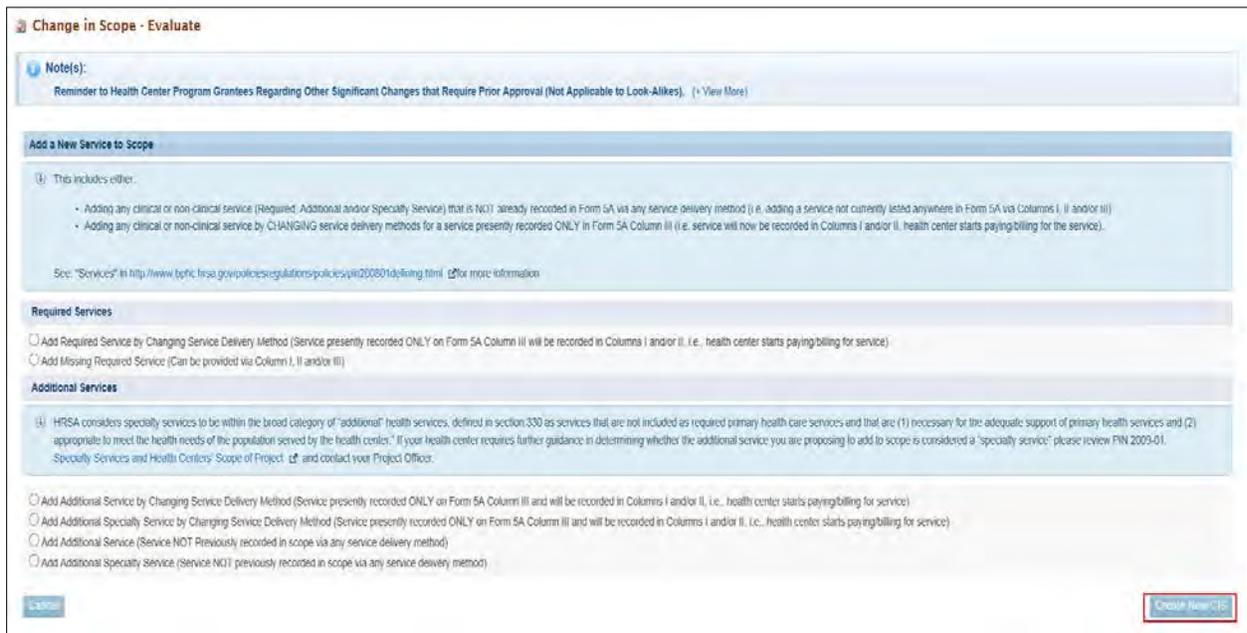
2.4.3. Change in Scope – Evaluate page for Different Formal CIS Request Types

Based on your selection of the CIS request type under the Formal CIS options section, on the **CIS Request Type – Select** page, the system navigates to one of the following **Change in Scope – Evaluate** pages.

2.4.3.1. Formal CIS Request Type - Add a New Service to Scope

1. On the **CIS Request Type – Select** page, under the Formal CIS Options section, choose the option to 'Add a New Service to Scope.' Click the **Save and Continue** button to save the information.
 - The system navigates to the **CIS Request Type – Evaluate** page.

Figure 12: Change in Scope Evaluate Page



2. Select appropriate sub-category and Click the **Create New CIS** button.
 - The system navigates to the **Status Overview Page**.

Figure 13: Status Overview Page

Status Overview

Success:
A CIS Request has been successfully created for you. Note the tracking number: CIS00015531

CIS00015531/Original: The Health Health Clinic Incorporated, Miami, FL Submission Status: In Progress

Grant Number: [REDACTED] BHCMS ID: [REDACTED] Project Period: 4/1/2002 - 3/31/2015
 Withdrawal Requested: N/A Created By: [REDACTED] Submitted By:

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#)

CIS Status	Status	Options
CIS Information		
Cover Page	Not Complete	Update
Assurances	Not Complete	Update
Change Details	Not Complete	Update
Change Checklist	Not Complete	Update
Other Information		
Supporting Documents	Not Complete	Update

2.4.3.2. Formal CIS Request Type - Delete an Existing Service from Scope

- On the CIS Request Type – Select page, under the Formal CIS Options section, choose ‘Delete an Existing Service from Scope’.
 - The system navigates to the **CIS Request Type – Evaluate** page.

Figure 14: Change in Scope – Evaluate Page

Change in Scope - Evaluate

Note(s):
Reminder to Health Center Program Grantees Regarding Other Significant Changes that Require Prior Approval (Not Applicable to Look-Alikes). [View More](#)

Delete an Existing Service from Scope

(i) This includes any of the following:

- Removing an Additional Service, including a Specialty Service from Form 5A entirely (i.e. service presently recorded on Form 5A Columns I, II and/or III will be removed from scope all together)
- Changing the service delivery method for a Required, Additional and/or Specialty Service presently recorded on Form 5A in Column I and/or II to ONLY being offered via a Formal Written Referral Arrangement (i.e. service will be recorded ONLY in Form 5A, Column III, health center stops paying/billing for service)

Required Services must be Provided via atleast One Service Delivery Method (Form 5A, Columns I, II and/or III).

Required Services

Change Service Delivery Method for Required Service (Service presently recorded on Form 5A Column I and/or II will be recorded ONLY in Column III, i.e., health center stops paying/billing for service)

Additional Services

Change Service Delivery Method for Additional Service, including Specialty Service (Service presently recorded on Form 5A Column I and/or II will be recorded ONLY in Column III, i.e., health center stops paying/billing for service)

Delete Additional Service, Including Specialty Service from Scope (Service presently recorded on Form 5A Column I, II and/or III will be removed from scope entirely)

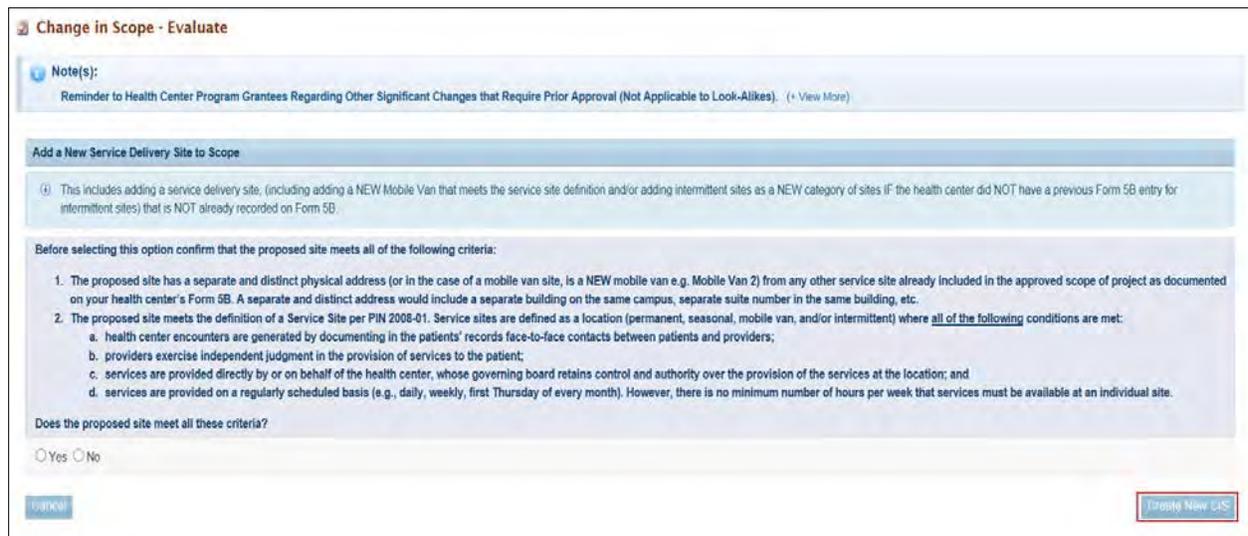
[Cancel](#) [Create New CIS](#)

2. Select appropriate sub-category and Click the Create New CIS button.
 - The system navigates to the **Status Overview** Page.

2.4.3.3. Formal CIS Request Type - Add a New Service Delivery Site to Scope

1. On the CIS Request Type – Select page, under the Formal CIS Options section, choose ‘Add a New Service Delivery Site to Scope’.
 - The system navigates to the **CIS Request Type – Evaluate** page.

Figure 15: Change in Scope – Evaluate Page



Change in Scope - Evaluate

Note(s):
Reminder to Health Center Program Grantees Regarding Other Significant Changes that Require Prior Approval (Not Applicable to Look-Alikes). (+ View More)

Add a New Service Delivery Site to Scope

(i) This includes adding a service delivery site, (including adding a NEW Mobile Van that meets the service site definition and/or adding intermittent sites as a NEW category of sites IF the health center did NOT have a previous Form 5B entry for intermittent sites) that is NOT already recorded on Form 5B.

Before selecting this option confirm that the proposed site meets all of the following criteria:

1. The proposed site has a separate and distinct physical address (or in the case of a mobile van site, is a NEW mobile van e.g. Mobile Van 2) from any other service site already included in the approved scope of project as documented on your health center's Form 5B. A separate and distinct address would include a separate building on the same campus, separate suite number in the same building, etc.
2. The proposed site meets the definition of a Service Site per PIN 2008-01. Service sites are defined as a location (permanent, seasonal, mobile van, and/or intermittent) where all of the following conditions are met:
 - a. health center encounters are generated by documenting in the patients' records face-to-face contacts between patients and providers;
 - b. providers exercise independent judgment in the provision of services to the patient;
 - c. services are provided directly by or on behalf of the health center, whose governing board retains control and authority over the provision of the services at the location; and
 - d. services are provided on a regularly scheduled basis (e.g., daily, weekly, first Thursday of every month). However, there is no minimum number of hours per week that services must be available at an individual site.

Does the proposed site meet all these criteria?

Yes No

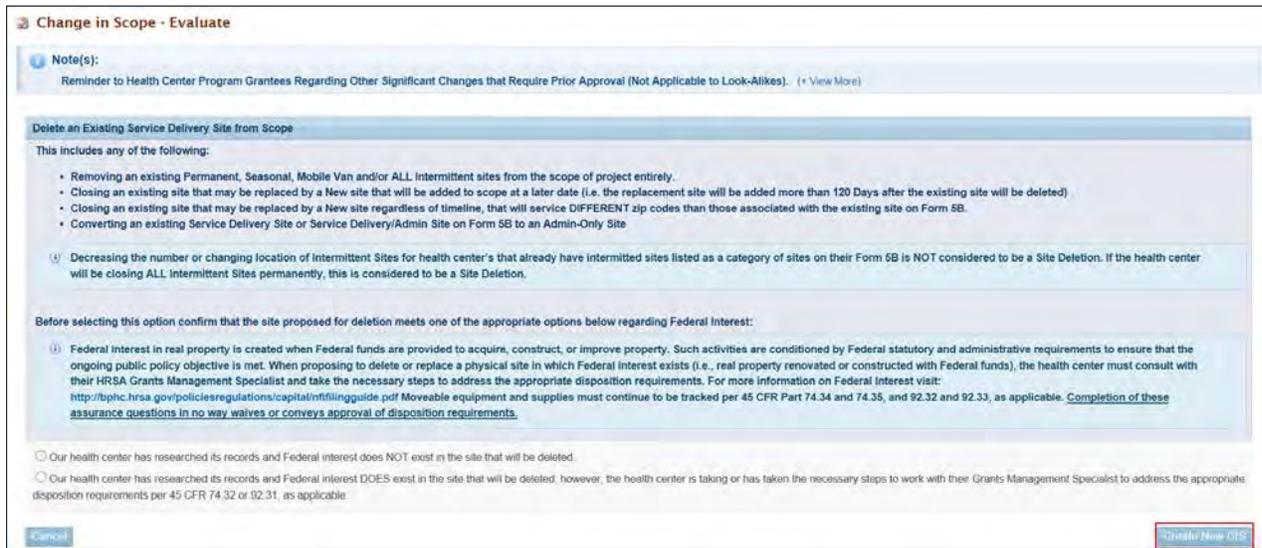
[Back](#) [Create New CIS](#)

2. Select the appropriate option and Click the **Create New CIS** button.
 - The system navigates to the **Status Overview** Page.

2.4.3.4. Formal CIS Request Type - Delete an Existing Service Delivery Site from Scope

1. On the **CIS Request Type – Select** page, under the **Formal CIS Options** section, choose ‘Delete an Existing Service Delivery Site from Scope’
 - The system navigates to the **CIS Request Type – Evaluate** page.

Figure 16: Change in Scope – Evaluate Page



2. Select the appropriate option and Click the **Create New CIS** button.

- The system navigates to the **Status Overview** Page.

2.4.3.5. Formal CIS Request Type

2.4.3.5.1. Convert an Existing Service Delivery Site or Service Delivery to an Admin-Only Site

1. On the **CIS Request Type – Select** page, under the Formal CIS Options section, choose ‘Convert an Existing Service Delivery Site or Service Delivery to an Admin-Only Site’

- The system navigates to the **CIS Request Type – Confirmation** page.

Figure 17: CIS Request Type – Confirm Page



2. Click the **Confirm** button.

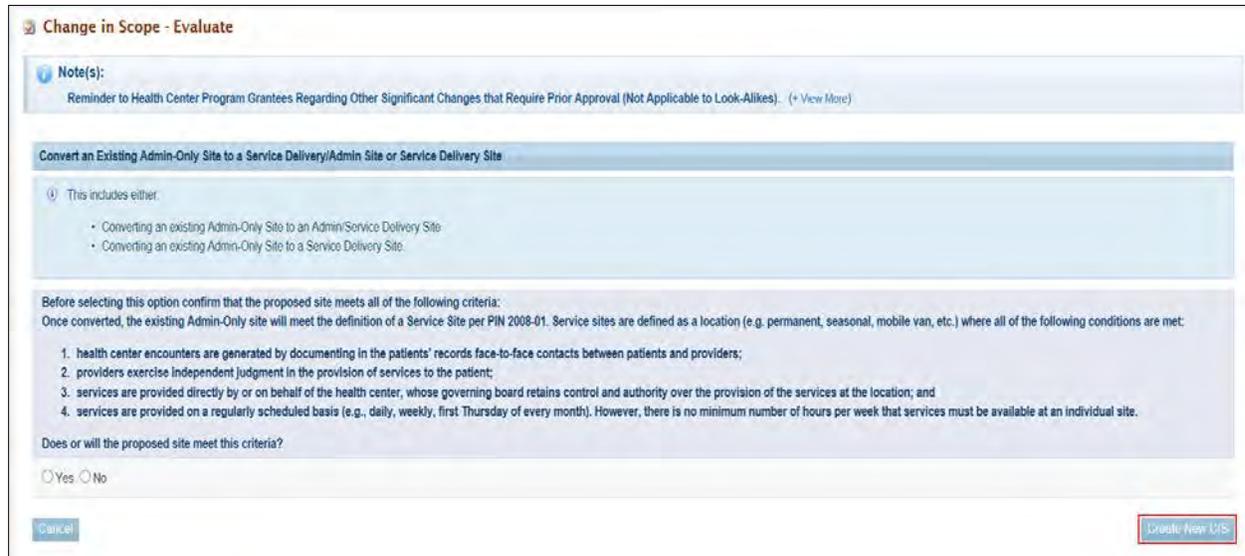
- The system navigates to the **Status Overview** Page.

2.4.3.6. Formal CIS Request Type

2.4.3.6.1. Convert an Existing Admin-Only Site to a Service Delivery/Admin Site or Service Delivery Site

1. On the CIS Request Type – Select page, under the Formal CIS Options section, choose ‘Convert an Existing Service Delivery Site or Service Delivery to an Admin-Only Site’
 - The system navigates to the **Change in Scope – Evaluate** page.

Figure 18: Change In Scope – Evaluate Page



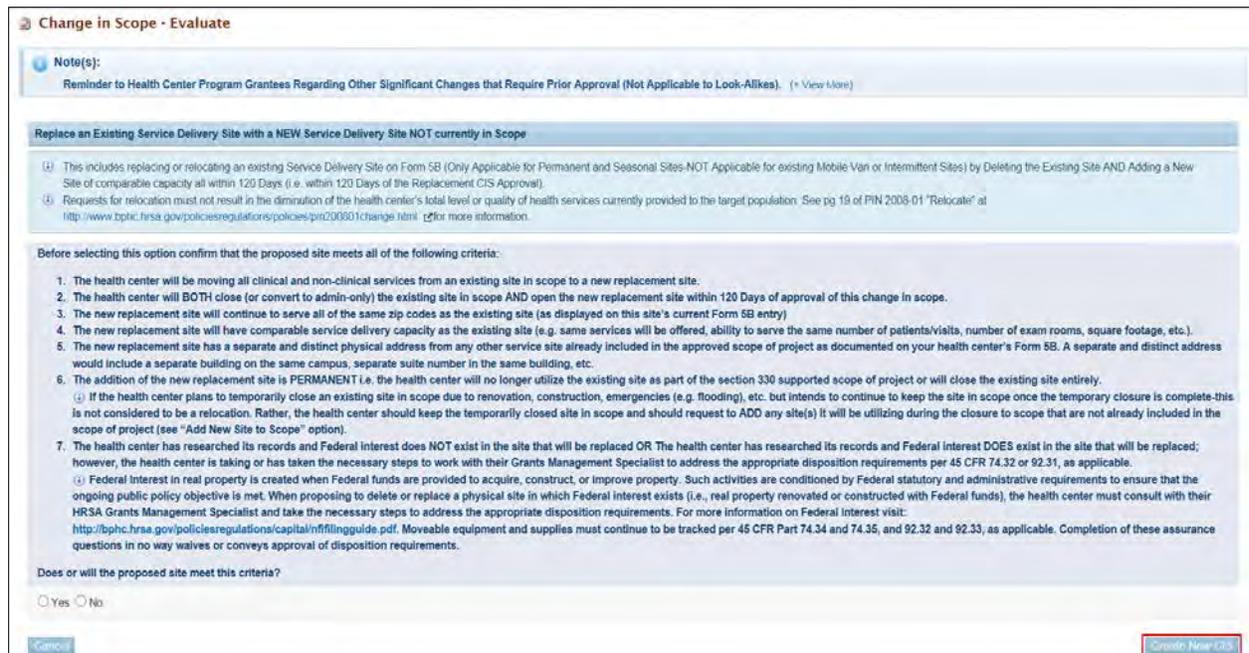
2. Select the appropriate option and Click the **Create New CIS** button.
 - The system navigates to the **Status Overview** Page.

2.4.3.7. Formal CIS Request Type

2.4.3.7.1. Replace an Existing Service Delivery Site with a New Service Delivery Site NOT currently in Scope

1. On the **CIS Request Type – Select** page, under the Formal CIS Options section, choose ‘Replace an Existing Service Delivery Site with a New Service Delivery Site NOT currently in Scope’.
 - The system navigates to the **Change in Scope – Evaluate** page

Figure 19: Change In Scope – Evaluate Page



Change in Scope - Evaluate

Note(s):
Reminder to Health Center Program Grantees Regarding Other Significant Changes that Require Prior Approval (Not Applicable to Look-Alikes). (+ View More)

Replace an Existing Service Delivery Site with a NEW Service Delivery Site NOT currently in Scope

(1) This includes replacing or relocating an existing Service Delivery Site on Form 5B (Only Applicable for Permanent and Seasonal Sites-NOT Applicable for existing Mobile Van or Intermittent Sites) by Deleting the Existing Site AND Adding a New Site of comparable capacity all within 120 Days (i.e. within 120 Days of the Replacement CIS Approval).
(2) Requests for relocation must result in the diminution of the health center's total level or quality of health services currently provided to the target population. See pg 19 of PIN 2008-01 "Relocate" at <http://www.bphc.hrsa.gov/policiesregulations/policies/pin200801change.html> for more information.

Before selecting this option confirm that the proposed site meets all of the following criteria:

1. The health center will be moving all clinical and non-clinical services from an existing site in scope to a new replacement site.
2. The health center will BOTH close (or convert to admin-only) the existing site in scope AND open the new replacement site within 120 Days of approval of this change in scope.
3. The new replacement site will continue to serve all of the same zip codes as the existing site (as displayed on this site's current Form 5B entry)
4. The new replacement site will have comparable service delivery capacity as the existing site (e.g. same services will be offered, ability to serve the same number of patients/visits, number of exam rooms, square footage, etc.).
5. The new replacement site has a separate and distinct physical address from any other service site already included in the approved scope of project as documented on your health center's Form 5B. A separate and distinct address would include a separate building on the same campus, separate suite number in the same building, etc.
6. The addition of the new replacement site is PERMANENT i.e. the health center will no longer utilize the existing site as part of the section 330 supported scope of project or will close the existing site entirely.
(1) If the health center plans to temporarily close an existing site in scope due to renovation, construction, emergencies (e.g. flooding), etc. but intends to continue to keep the site in scope once the temporary closure is complete-this is not considered to be a relocation. Rather, the health center should keep the temporarily closed site in scope and should request to ADD any site(s) it will be utilizing during the closure to scope that are not already included in the scope of project (see "Add New Site to Scope" option).
7. The health center has researched its records and Federal interest does NOT exist in the site that will be replaced OR The health center has researched its records and Federal interest DOES exist in the site that will be replaced; however, the health center is taking or has taken the necessary steps to work with their Grants Management Specialist to address the appropriate disposition requirements per 45 CFR 74.32 or 92.31, as applicable.
(1) Federal interest in real property is created when Federal funds are provided to acquire, construct, or improve property. Such activities are conditioned by Federal statutory and administrative requirements to ensure that the ongoing public policy objective is met. When proposing to delete or replace a physical site in which Federal interest exists (i.e., real property renovated or constructed with Federal funds), the health center must consult with their HRSA Grants Management Specialist and take the necessary steps to address the appropriate disposition requirements. For more information on Federal interest visit: <http://bphc.hrsa.gov/policiesregulations/capital/filingguide.pdf>. Moveable equipment and supplies must continue to be tracked per 45 CFR Part 74.34 and 74.35, and 92.32 and 92.33, as applicable. Completion of these assurance questions in no way waives or conveys approval of disposition requirements.

Does or will the proposed site meet this criteria?
 Yes No

Cancel Create New CIS

2. Select the appropriate option and click the **Create New CIS** button.

- The system navigates to the **Status Overview** Page.

2.4.3.8. Formal CIS Request Type - Add Target Population

You can only request this change if you are NOT serving the general underserved populations.

On the **CIS Request Type – Select** page, under the Formal CIS Options section, choose 'Add Target Population'.

- The system navigates to the **Change in Scope – Evaluate** page.

Figure 20: Change In Scope – Evaluate Page

Change in Scope - Evaluate

Note(s):
Reminder to Health Center Program Grantees Regarding Other Significant Changes that Require Prior Approval (Not Applicable to Look-Alikes). [\(+ View More\)](#)

Add Target Population

(i) This includes Health Center Program grantees funded only under sections 330(g), (h), and/or (i) of the Public Health Service (PHS) Act requesting to change their scope of project by adding a new target population beyond the population for which section 330 Federal grant funds are currently awarded
Note: Health centers that currently receive funding under section 330(e) to serve the general community population do NOT need to submit a change in scope request to serve one or more special populations

Before selecting this option confirm all of the following criteria:

- Your health center currently receives targeted funding/designation only under sections 330(g), (h), and/or (i) of the Public Health Service (PHS) Act (i.e. your health center is a "special populations-only health center").
- (Only Applicable for Health Center Program Grantees) Your health center is aware that a portion of its HRSA grant funds will be reallocated to support services to the new target population.
- Your health center is aware that requesting to add a new target population to scope does not relieve the health center of its obligation to continue to serve the existing target population(s) as approved in the current scope of project.

Yes No

3. General Instructions for Competing the CIS Request

Once you create a Change in Scope request, you must complete the CIS request using the built-in system instructions and the instructions provided in the PIN.

You can access the CIS request through the **Change In Scope - List** page. To edit the CIS request click the **Edit** link for the CIS request.

Figure 21: Change In Scope Request – List Page

Started	Date Started	Tracking #	Version	Grant #	Grantee Name	Request Type	Submission Status	HRSA Review Status	Options
0 days ago	9/12/2013	CIS00015534	Original	HRSA-15-00000	The Greater Good...	Add Missing Required Service	In Progress	N/A	Edit
0 days ago	9/12/2013	CIS00015531	Original	HRSA-15-00000	The Greater Good...	Add Required Service	In Progress	N/A	Edit
0 days ago	9/12/2013	CIS00015525	Original	HRSA-15-00000	The Greater Good...	Update Required Services	In Progress	N/A	Edit

- The system navigates to the **Status Overview** page.

Figure 22: Status Overview Page

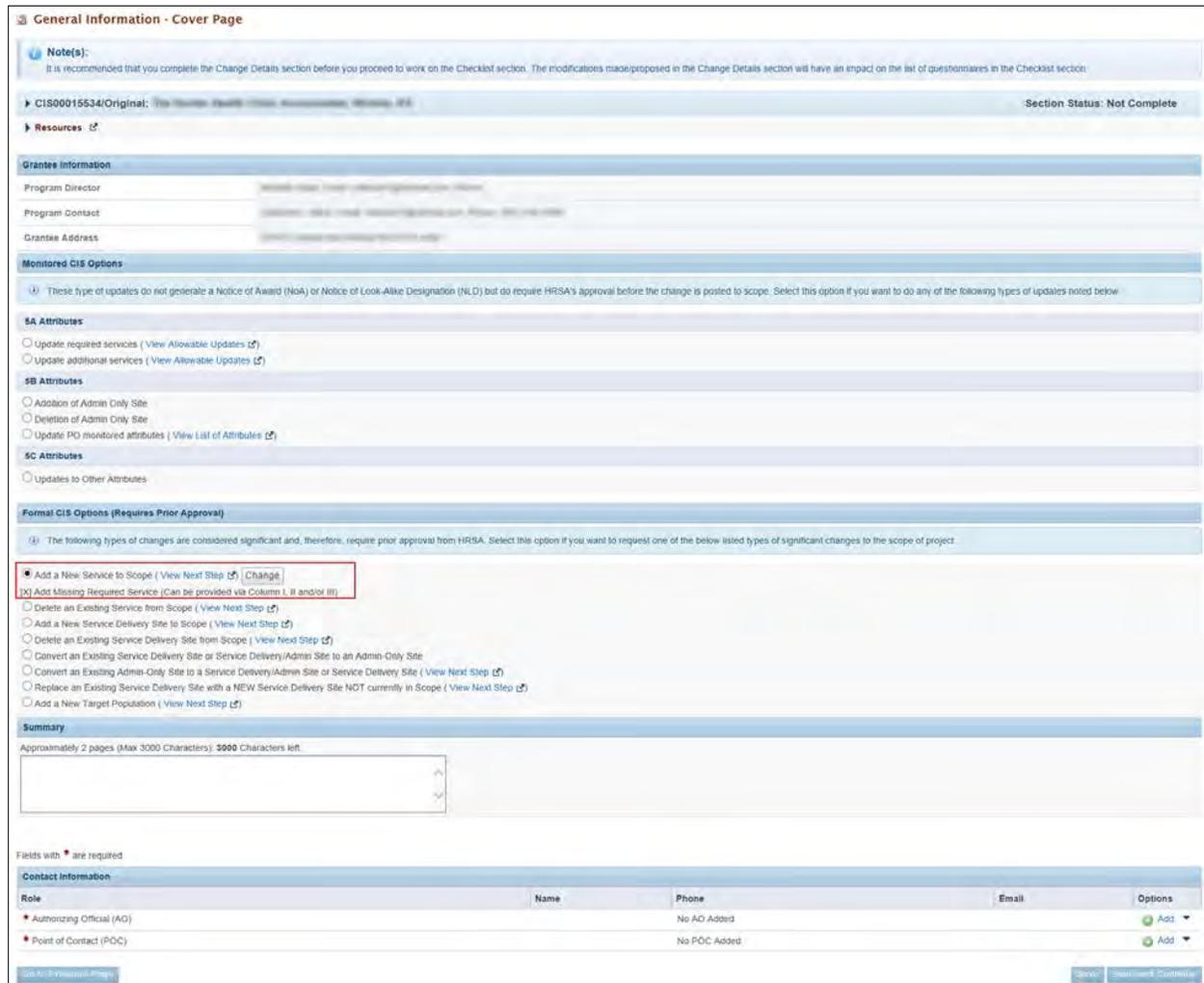
Section	Status	Options
CIS Information		
Cover Page	Not Complete	Update
Assurances	Not Complete	Update
Change Details	Not Complete	Update
Change Checklist	Not Complete	Update
Other Information		
Supporting Documents	Not Complete	Update

You must complete all the sections on the Status Overview in order to submit the Change In Scope request.

3.1. Cover Page

1. Click the **Update** link for the **Cover Page**, on the **Status Overview** page.
 - The system displays the type of request you selected in the previous screens.

Figure 23: General Information – Cover Page



General Information - Cover Page

Note(s):
It is recommended that you complete the Change Details section before you proceed to work on the Checklist section. The modifications made/proposed in the Change Details section will have an impact on the list of questionnaires in the Checklist section.

CIS00015534/Original: [Link] Section Status: Not Complete

Resources [Link]

Grantee Information

Program Director: [Link]
 Program Contact: [Link]
 Grantee Address: [Link]

Monitored CIS Options

(i) These type of updates do not generate a Notice of Award (NOA) or Notice of Look-Alike Designation (NLD) but do require HRSA's approval before the change is posted to scope. Select this option if you want to do any of the following types of updates noted below.

SA Attributes

Update required services (View Allowable Updates [Link])
 Update additional services (View Allowable Updates [Link])

SB Attributes

Addition of Admin Only Site
 Deletion of Admin Only Site
 Update PD monitored attributes (View List of Attributes [Link])

SC Attributes

Updates to Other Attributes

Format CIS Options (Requires Prior Approval)

(i) The following types of changes are considered significant and, therefore, require prior approval from HRSA. Select this option if you want to request one of the below listed types of significant changes to the scope of project.

Add a New Service to Scope (View Next Step [Link]) [Change]
 Add Missing Required Service (Can be provided via Column I, II and/or III)
 Delete an Existing Service from Scope (View Next Step [Link])
 Add a New Service Delivery Site to Scope (View Next Step [Link])
 Delete an Existing Service Delivery Site from Scope (View Next Step [Link])
 Convert an Existing Service Delivery Site or Service Delivery/Admin Site to an Admin Only Site
 Convert an Existing Admin-Only Site to a Service Delivery/Admin Site or Service Delivery Site (View Next Step [Link])
 Replace an Existing Service Delivery Site with a NEW Service Delivery Site NOT currently in Scope (View Next Step [Link])
 Add a New Target Population (View Next Step [Link])

Summary

Approximately 2 pages (Max 3000 Characters): 3000 Characters left.

Fields with * are required.

Contact Information

Role	Name	Phone	Email	Options
* Authorizing Official (AO)		No AO Added		Add
* Point of Contact (POC)		No POC Added		Add

[Go to Previous Step] [Save] [Save and Continue]

You can only submit one significant change request per CIS request. If you need to request multiple changes, you must submit a separate CIS request for each change.

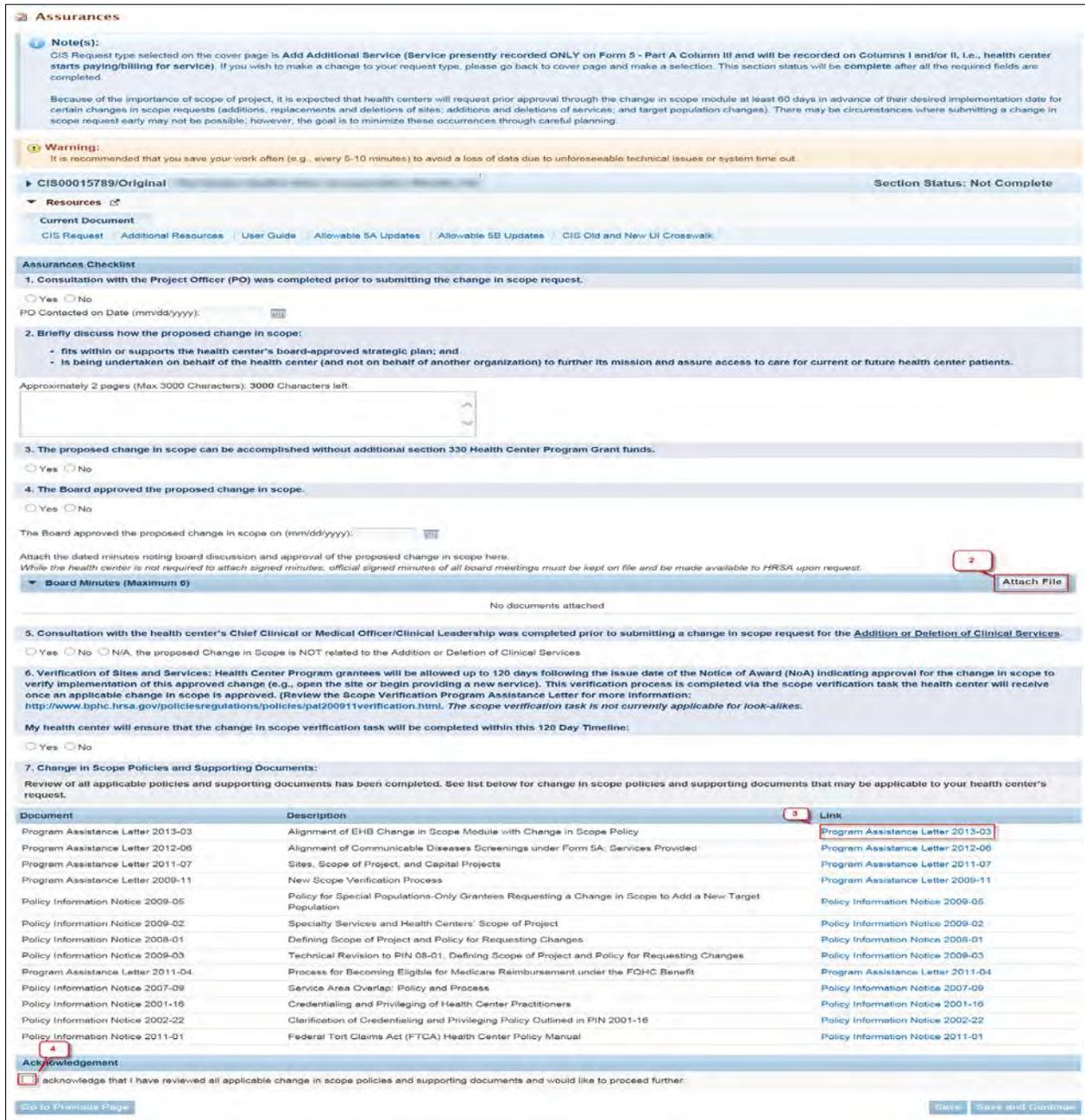
2. Provide the Contact Information by clicking on the **Add** button under the options column.
3. Click the **Save and Continue** button to save and proceed to the Assurances form.
4. You can change the CIS type on this page. If you change the CIS type on this page, you will need to visit the Assurances page again to acknowledge, even if this form was already completed.

3.2. Assurances

1. Complete the assurances form, by answering all the questions in the checklist.

- You **MUST** complete the Assurances form in order to proceed to the next form.
- Some of the questions are 'Not Applicable' in this checklist. These are applicable depending on the CIS request type.

Figure 24: Assurances Page



Assurances

Note(s):
CIS Request type selected on the cover page is **Add Additional Service** (Service presently recorded **ONLY** on Form 5 - Part A Column III and will be recorded on Columns I and/or II, i.e., health center starts paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the required fields are completed.

Because of the importance of scope of project, it is expected that health centers will request prior approval through the change in scope module at least 60 days in advance of their desired implementation date for certain changes in scope requests (additions, replacements and deletions of sites; additions and deletions of services; and target population changes). There may be circumstances where submitting a change in scope request early may not be possible; however, the goal is to minimize these occurrences through careful planning.

Warning:
It is recommended that you save your work often (e.g., every 5-10 minutes) to avoid a loss of data due to unforeseeable technical issues or system time out.

CIS00015789/Original Section Status: Not Complete

Resources

Current Document
CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

Assurances Checklist

1. Consultation with the Project Officer (PO) was completed prior to submitting the change in scope request.
 Yes No
PO Contacted on Date (mm/dd/yyyy):

2. Briefly discuss how the proposed change in scope:
- fits within or supports the health center's board-approved strategic plan; and
- is being undertaken on behalf of the health center (and not on behalf of another organization) to further its mission and assure access to care for current or future health center patients.
Approximately 2 pages (Max 3000 Characters): 3000 Characters left.

3. The proposed change in scope can be accomplished without additional section 330 Health Center Program Grant funds.
 Yes No

4. The Board approved the proposed change in scope.
 Yes No
The Board approved the proposed change in scope on (mm/dd/yyyy):
Attach the dated minutes noting board discussion and approval of the proposed change in scope here.
While the health center is not required to attach signed minutes, official signed minutes of all board meetings must be kept on file and be made available to HRSA upon request.

Board Minutes (Maximum 6) Attach File
No documents attached

5. Consultation with the health center's Chief Clinical or Medical Officer/Clinical Leadership was completed prior to submitting a change in scope request for the **Addition or Deletion of Clinical Services**.
 Yes No N/A, the proposed Change in Scope is NOT related to the Addition or Deletion of Clinical Services

6. Verification of Sites and Services: Health Center Program grantees will be allowed up to 120 days following the issue date of the Notice of Award (NoA) indicating approval for the change in scope to verify implementation of this approved change (e.g., open the site or begin providing a new service). This verification process is completed via the scope verification task the health center will receive once an applicable change in scope is approved. (Review the Scope Verification Program Assistance Letter for more information: <http://www.bphc.hrsa.gov/policies/regulations/policies/pat200911verification.html>). The scope verification task is not currently applicable for look-alikes.
My health center will ensure that the change in scope verification task will be completed within this 120 Day Timeline:
 Yes No

7. Change in Scope Policies and Supporting Documents:
Review of all applicable policies and supporting documents has been completed. See list below for change in scope policies and supporting documents that may be applicable to your health center's request.

Document	Description	Link
Program Assistance Letter 2013-03	Alignment of EHB Change in Scope Module with Change in Scope Policy	Program Assistance Letter 2013-03
Program Assistance Letter 2012-06	Alignment of Communicable Diseases Screenings under Form 5A: Services Provided	Program Assistance Letter 2012-06
Program Assistance Letter 2011-07	Sites, Scope of Project, and Capital Projects	Program Assistance Letter 2011-07
Program Assistance Letter 2009-11	New Scope Verification Process	Program Assistance Letter 2009-11
Policy Information Notice 2009-05	Policy for Special Populations-Only Grantees Requesting a Change in Scope to Add a New Target Population	Policy Information Notice 2009-05
Policy Information Notice 2009-02	Specialty Services and Health Centers' Scope of Project	Policy Information Notice 2009-02
Policy Information Notice 2008-01	Defining Scope of Project and Policy for Requesting Changes	Policy Information Notice 2008-01
Policy Information Notice 2009-03	Technical Revision to PIN 08-01, Defining Scope of Project and Policy for Requesting Changes	Policy Information Notice 2009-03
Program Assistance Letter 2011-04	Process for Becoming Eligible for Medicare Reimbursement under the FQHC Benefit	Program Assistance Letter 2011-04
Policy Information Notice 2007-09	Service Area Overlap: Policy and Process	Policy Information Notice 2007-09
Policy Information Notice 2001-16	Credentialing and Privileging of Health Center Practitioners	Policy Information Notice 2001-16
Policy Information Notice 2002-22	Clarification of Credentialing and Privileging Policy Outlined in PIN 2001-16	Policy Information Notice 2002-22
Policy Information Notice 2011-01	Federal Tort Claims Act (FTCA) Health Center Policy Manual	Policy Information Notice 2011-01

Acknowledgement
 I acknowledge that I have reviewed all applicable change in scope policies and supporting documents and would like to proceed further.

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

2. You can attach the Board Minutes by clicking the **Attach File** button.

3. View the Change in Scope policy documents by clicking the document name under the links column.
4. Acknowledge the checklist by checking the checkbox under the **Acknowledgement** section.
5. Click the **Save and Continue** button to proceed to the **Change Detail** form.

3.3. Change Details

A CIS request can propose only one change in the Scope of Project. The system displays the Change Details screen as per the CIS request type. The following are the types of changes to Scope of Project for which a complete Formal CIS request is required:

- Addition of a Service
- Deletion of a Service
- Addition of a Service Site
- Deletion of a Service Site
- Conversion of an Admin-only Site to Service Delivery or Service Delivery/Admin Site
- Conversion of a Service Delivery or Service Delivery/Admin Site to an Admin-only Site
- Replacement of a Service Site
- Addition of Target Population

All the CIS requests you create falls under one of the following categories. The table below shows how CIS actions map to the six headings.

Service	Add	Health Center starts paying for a required/additional/specialty service Health Center starts providing a missing required/new additional/new additional specialty service
	Delete	Health Center stops paying for a required/ additional service Health Center stops providing an existing additional service
Site	Add	Health Center adds a Service Delivery/Admin or Service Delivery site currently not in Scope Health Center converts an existing Admin-Only site to a Service Delivery/Admin or Service Delivery site
	Delete	Health Center terminates a site completely Health Center converts a Service Delivery/Admin or Service Delivery site to an Admin-Only site
	Replace	Health Center replaces an approved site with a new location
Target Population	Add	Health Center adds a new target population

Table 4: List of CIS Actions

- You may choose to complete the Change Details section prior to working on the checklist.

- Selections made in the Change Details section can directly affect the checklist questionnaires.

3.3.1. Monitored CIS Option - Updating the 5A Attributes

Update Required Services or Update Additional Services

1. To complete the Update Required Service CIS type, the system displays the **Form 5A: Required Services Change Details** Page.
2. To complete the Update Additional Services CIS type, the system displays the **Form 5A: Additional Services Change Details** Page.

Figure 25: Change Details Page

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is Update required services. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.
 Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS000 Section Status: Not Complete

Resources

Current Document
 CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

Select Service from List

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Status	Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)		
Screenings	X	X		X	X		Not Changed	Update

Go to Previous Page Save Save and Continue

3. To update a service, click on the **Select Service from List** button. The system displays the Select Services – To be Updated section.

Figure 26: Select Services – To Update section

Service Type	Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
General Primary Medical Care	X		X	Select Service
Diagnostic Laboratory	X			Select Service
Diagnostic Radiology		X		Select Service
Screenings	X	X		Select Service
Coverage for Emergencies During and After Hours		X		Select Service
Voluntary Family Planning	X			Select Service
Immunizations	X			Select Service
Well Child Services	X	X		Select Service
Gynecological Care	X			Select Service
Obstetrical Care				
Prenatal Care	X			Select Service
Intrapartum Care (Labor & Delivery)	X			Select Service
Postpartum Care	X			Select Service
Preventive Dental	X			Select Service
Pharmaceutical Services		X		Select Service
Case Management	X			Select Service
Eligibility Assistance	X			Select Service
Health Education	X			Select Service
Outreach	X			Select Service

4. Select one of the services on this page by clicking the **Select Service** link under the 'Options' column in the table below to update the Service Delivery Method(s) of the service.
5. To update the Service Delivery Method(s), click the **Update** link.

Figure 27: Change Details

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is Update required services. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.
 Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS000 Section Status: Not Complete

Resources

Current Document

CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

Select Service from List

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Status	Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)		
Screenings	X	X		X	X		Not Changed	Update

Go to Previous Page Save Save and Continue

6. The system displays the editable version of the service selected.

Figure 28: Change Details

▶ CIS000 Section Status: Not Complete

▼ Resources

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Original Record From Scope			
Service Type	Service Delivery Methods		
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Screenings	X	X	

Update Record			
Service Type	Service Delivery Methods		
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Screenings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Save and Continue

- Refer to the list of allowable updates to the Service Delivery Method(s) in the screen below. To access this link, click the [View Allowable Updates](#) link on the **CIS Request Type - Select** page or the [Allowable 5A Updates](#) link in the Resources section.

Figure 29: CIS Request Type - Select Page

CIS Request Type - Select

Note(s):
 If you are unsure about the need to complete a change in scope request, we recommend contacting the program contact listed on your Notice of Award (NoA). This change in scope request applies to changes in Sites, Services, and Target Population NOT changes in federal funds. For changes in federal funds, please contact your Project Officer.

Monitored CIS Options

These type of updates do not generate a Notice of Award (NoA) or Notice of Look-Alike Designation (NLD) but do require HRSA's approval before the change is posted to scope. Select this option if you want to do any of the following types of updates noted below.

5A Attributes

Update required services [View Allowable Updates](#) ↗
 Update additional services [View Allowable Updates](#) ↗

5B Attributes

Addition of Admin Only Site
 Deletion of Admin Only Site
 Update PO monitored attributes [View List of Attributes](#) ↗

5C Attributes

Updates to Other Attributes

Figure 30: List of Allowable Attributes

Monitored 5A Changes:

The following changes are made through a 'Monitored 5A Attributes' CIS request. This includes 'Update Required Services' and 'Update Additional Services' request types.

List of Service updates allowed through Monitored CIS Requests:						
Original Service Delivery Method (FROM)			Allowable Service Delivery Method (TO)			
Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)		Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
x				x	x	
x				x		x
x			→	x	x	x
x					x	
x					x	x
	x			x		
	x			x		x
	x		→	x	x	x
	x			x	x	
	x			x	x	x
x	x			x	x	x
x	x			x		x
x	x		→	x	x	x
x	x			x		
	x	x		x	x	
	x	x	→	x	x	
	x	x		x		x
	x	x		x		x
x		x		x	x	
x		x		x		
x		x	→	x		
x		x		x		x
x		x		x		x
x	x	x		x	x	
x	x	x	→	x	x	
x	x	x		x		x
x	x	x			x	x

Formal 5A Changes:

The following changes are made through a Formal CIS request. This includes 'Add a New Service to Scope' and 'Delete an Existing Service from Scope' request types.

List of Service updates allowed through Formal CIS Requests:						
Original Service Delivery Method (FROM)			Allowable Service Delivery Method (TO)			
Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)		Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Delete Service - Health Center Stops Paying for Required/Additional/Specialty Service(s)						
x						x
x	x					x
x	x	x				x
x		x	→			x
	x					x
	x	x				x
Add Service - Health Center Starts Paying for Required/Additional/Specialty Service(s)						
		x		x	x	x
		x		x	x	
		x	→	x		
		x			x	
		x		x		x
		x			x	x

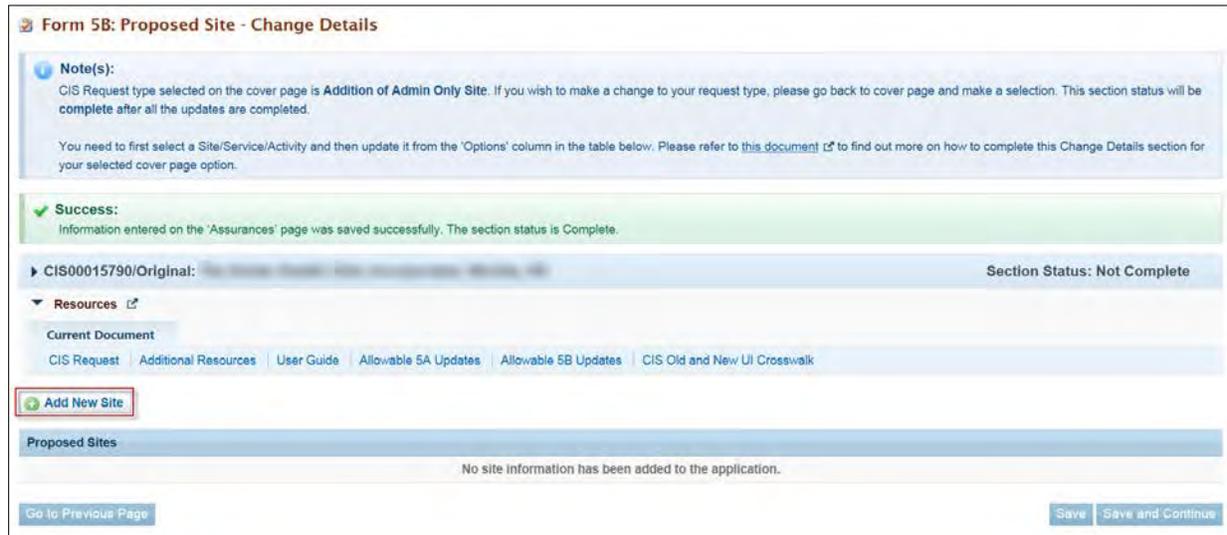
8. You may choose to update more than one service by repeating the above steps.

3.3.2. Monitored CIS Options – Updating 5B Attributes

3.3.2.1. Addition of Admin only Site

1. The system displays the **Form 5B: Proposed Site - Change Details** page.

Figure 31: Change Details Page



Form 5B: Proposed Site - Change Details

Note(s):
 CIS Request type selected on the cover page is **Addition of Admin Only Site**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS00015790/Original: Section Status: Not Complete

Resources

Current Document
 CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

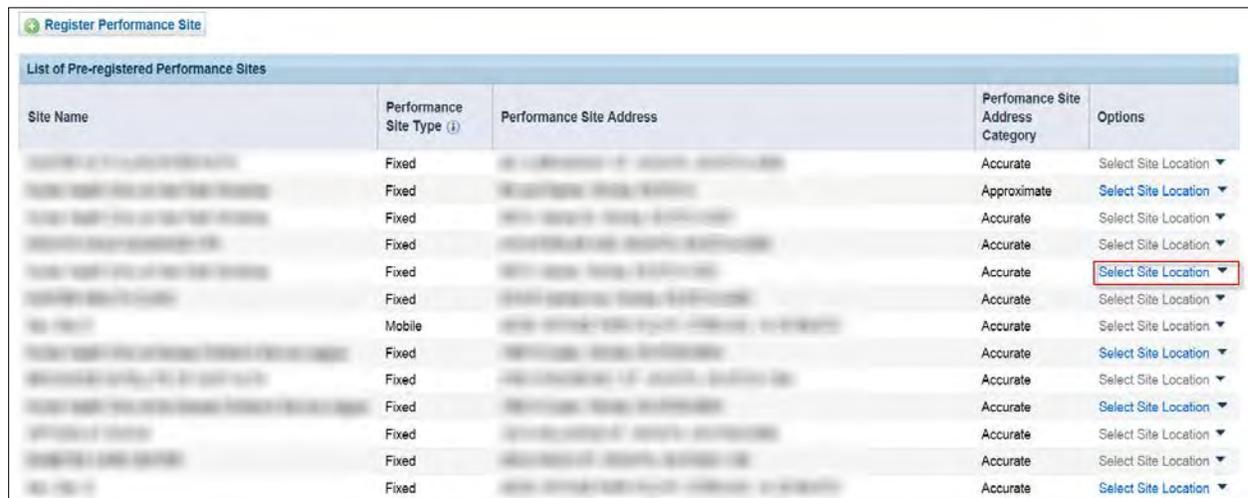
Add New Site

Proposed Sites
 No site information has been added to the application.

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

2. To complete this section, click the **Add New Site** button.
3. The system displays the List of Pre-Registered sites. Either select one of the listed performance sites or click on the **Register Performance Site** button to register a new site and then select it from the updated list of performance sites.

Figure 32: Form 5B: Proposed Site – List of Pre-Registered Performance Sites Section



Register Performance Site

List of Pre-registered Performance Sites

Site Name	Performance Site Type	Performance Site Address	Performance Site Address Category	Options
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Approximate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Mobile	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location
...	Fixed	...	Accurate	Select Site Location

4. Select the site by clicking the **Select Site Location** link under the options column.
5. Enter all the required details of the site on the **Form 5B: Edit** page.

Figure 33: Form 5B: Edit Page

Form-5B : Edit

Note(s):
It is recommended that you save your work often (e.g., every 5 minutes) to avoid a loss of data due to unforeseeable technical issues.

Warning:
If you change the Site Operator selection, certain questions on the Checklist will be reset and any previously provided information will be lost.

Fields with * are required for all site types.

Site Information Status: Not Started

* Site Name	<input type="text" value="RiverStone Health Clinic-Lockwood"/> Change Site Name	* Physical Site Address	<input type="text" value="1932 Highway 87 East, Billings, MT 59111"/> Change Location
* Site Type	<input type="text" value="Select Site Type"/>	* Site Phone Number	() - - Ext.
Web URL	<input type="text"/>		

The following fields are required for "Service Delivery" and "Administrative/Service Delivery" site types, other than where exceptions are noted:

* Location Type	<input type="text" value="Select Location Type"/>	* Site Setting	<input type="text" value="Select Site Setting"/>
Date Site was Added to Scope	N/A	Site Operational Date	<input type="text"/>
* FQHC Site Medicare Billing Number Status	<input type="text" value="Select Medicare Billing Number Status"/>	FQHC Site Medicare Billing Number (Required if "This site has a Medicare billing number" is selected in 'FQHC Site Medicare Billing Number Status' field.) e.g. 12345 OR 123456	<input type="text"/>
FQHC Site National Provider Identification (NPI) Number (Optional field.) e.g. 1234567890	<input type="text"/>	Total Hours of Operation (when Patients will be Served per Week)	<input type="text"/>
Months of Operation	<input type="text"/>		
Saved Months of Operation	<input type="text"/>		
Number of Contract Service Delivery Locations (Required only for 'Migrant Voucher Screening' Site Type)	<input type="text"/>	Number of Intermittent Sites (Required only for 'Intermittent' Site Type)	<input type="text"/>
* Site Operated by	<input type="text" value="Select Site Operated By"/>		

[Add Subrecipient/Contractor](#)

Subrecipient or Contractor Information (Required only if 'Subrecipient or Contractor' is selected in 'Site Operated By'... (* View More))

Subrecipient/Contractor Organization Name	Subrecipient/Contractor Organization Physical Site Address	Subrecipient/Contractor EINI	Options
No Subrecipient or Contractor information to be displayed			

Service Area Zip Code (Include only those from which the majority of the patient population will come)

* Service Area Zip Codes	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Save Zip Code(s)
Saved Service Area Zip Code(s)	

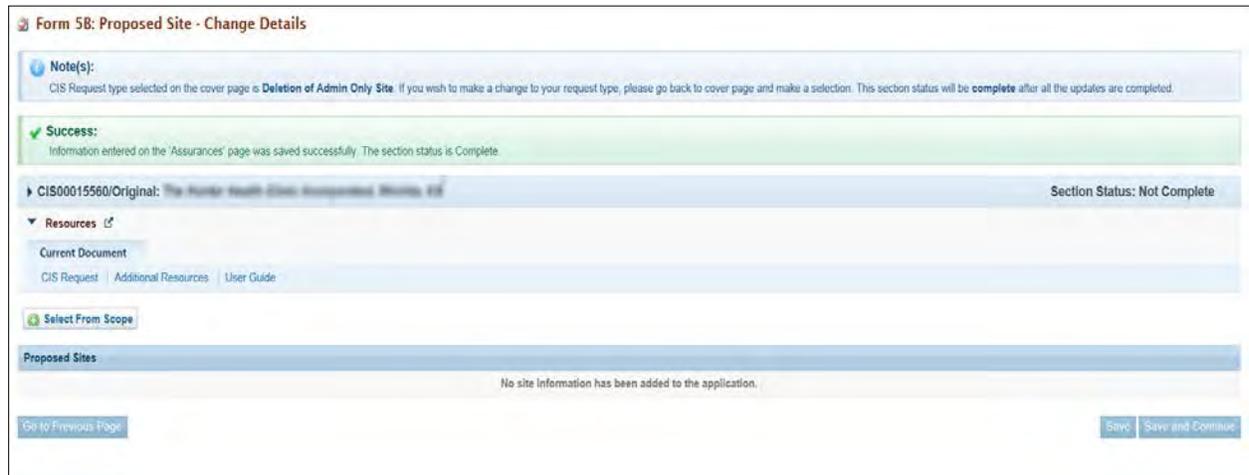
[Go to Previous Page](#) [Save](#) [Save and Continue](#)

- You may click **Save** to view any errors on this page.
- Click **Save and Continue** to proceed to the next form. If the Section status is 'Not Complete,' click on 'Update' under the 'Options' column to complete Form 5B.

3.3.2.2. Deletion of Admin only Site

1. The system displays the **Form 5B: Proposed Site - Change Details** page.

Figure 34: Form 5B: Proposed Site – Change Details



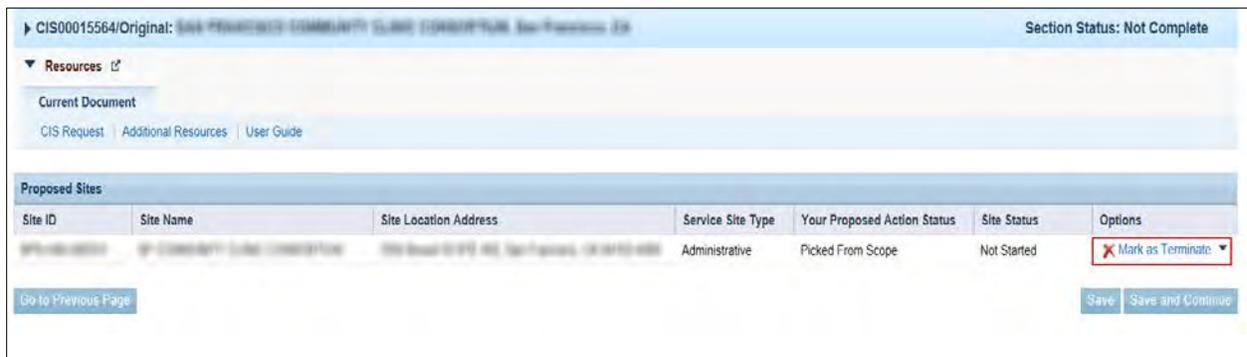
2. To delete the admin only site, click the **Select from Scope** button.
3. The system displays the list of existing sites from scope.

Figure 35: Form 5B: Proposed Site – Existing Sites from Scope Section

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
SP14000002	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000004	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000008	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000010	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000011	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Administrative	Permanent	Select Site Location ▼
SP14000012	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000013	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000014	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000015	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼
SP14000016	AMERICAN HOSPITAL CENTER INC	660 CAMP ST, SAN FRANCISCO, CA 94110-1000	Service Delivery Site	Permanent	Select Site Location ▼

4. Choose the site by clicking on **Select Site Location** link.
5. The system displays the selected site to terminate. Click the **Mark as Terminate** link under the 'Options' column.

Figure 36: Form 5B: Proposed Site Page



The screenshot shows the 'Form 5B: Proposed Site' page. At the top, it displays the request ID 'CIS00015564/Original: 000 PHOENIX/00015564/00015564/00015564' and the 'Section Status: Not Complete'. Below this is a 'Resources' section with a 'Current Document' subsection containing links for 'CIS Request', 'Additional Resources', and 'User Guide'. The main area is titled 'Proposed Sites' and contains a table with the following data:

Site ID	Site Name	Site Location Address	Service Site Type	Your Proposed Action Status	Site Status	Options
000 PHOENIX/00015564/00015564/00015564	000 PHOENIX/00015564/00015564/00015564	000 PHOENIX/00015564/00015564/00015564	Administrative	Picked From Scope	Not Started	Mark as Terminate

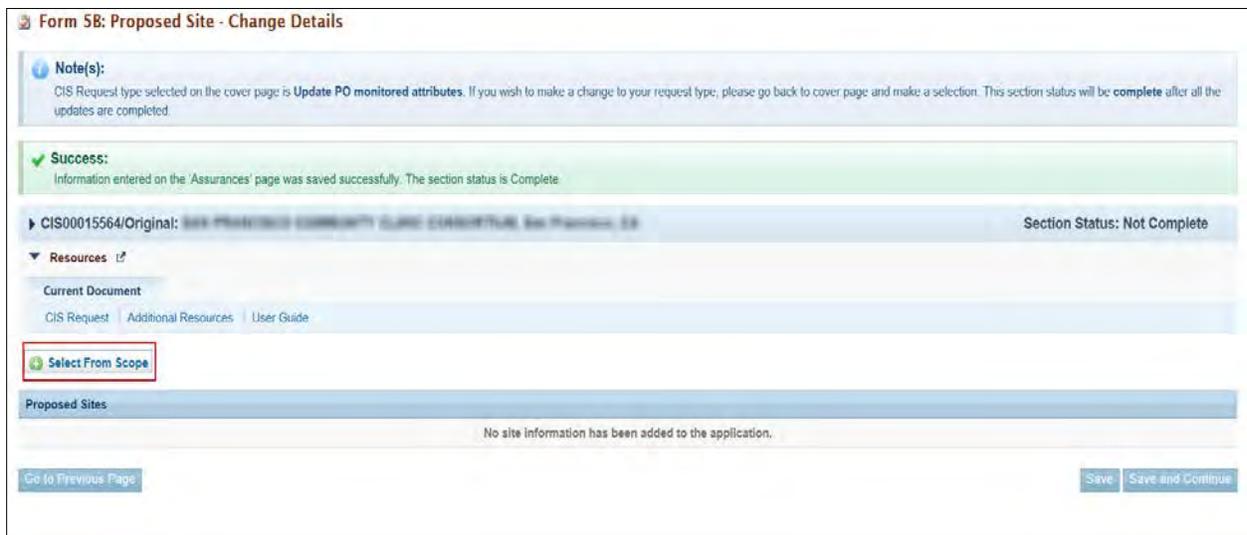
At the bottom of the table, there is a 'Go to Previous Page' button on the left and 'Save' and 'Save and Continue' buttons on the right.

6. The system displays the confirmation page; click the **Confirm** button to complete this section.

3.3.2.3. Update PO Monitored Attributes

1. The system displays the **Form 5B: Proposed Site - Change Details** page

Figure 37: Form 5B: Proposed Site – Change Details Page



The screenshot shows the 'Form 5B: Proposed Site - Change Details' page. It features a 'Note(s):' section with a warning icon and text: 'CIS Request type selected on the cover page is Update PO monitored attributes. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.' Below this is a 'Success:' section with a green checkmark and text: 'Information entered on the 'Assurances' page was saved successfully. The section status is Complete.' The top of the page shows the request ID 'CIS00015564/Original: 000 PHOENIX/00015564/00015564/00015564' and 'Section Status: Not Complete'. The 'Resources' section includes 'Current Document' links for 'CIS Request', 'Additional Resources', and 'User Guide'. A 'Select From Scope' button is highlighted with a red box. Below this is a 'Proposed Sites' section with the message: 'No site information has been added to the application.' At the bottom, there is a 'Go to Previous Page' button on the left and 'Save' and 'Save and Continue' buttons on the right.

2. To update the PO monitored attributes, click the **Select from Scope** button.

3. The system displays the list of registered sites. Choose the site to update by clicking the **Select Site Location** link from the list.

Figure 38: Existing Sites form Scope Section

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
SPS-100-00001	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0001	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00002	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0002	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00003	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0003	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00004	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0004	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00005	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0005	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00006	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0006	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00007	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0007	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00008	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0008	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00009	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0009	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00010	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0010	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00011	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0011	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00012	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0012	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00013	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0013	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00014	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0014	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00015	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0015	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00016	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0016	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00017	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0017	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00018	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0018	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00019	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0019	Service Delivery Site	Permanent	Select Site Location ▼
SPS-100-00020	San Francisco Bay Area (SFBA) - SFBA	San Francisco, CA 94104-0020	Service Delivery Site	Permanent	Select Site Location ▼

- The system displays the **Change Details** page with the site selected. Click the **Update** link under the 'Options' column.
- On the **Form5B: Edit** page, update one or more of the PO Monitored attributes. To find the list of the attributes click the **View List of Attributes** link on the **Cover** page or the **Allowable 5B Updates** link in the Resources section.

Figure 39: Monitored CIS Requests

Resources

Current Document

CIS Request | Additional Resources | User Guide | Allowable 5A Updates | **Allowable 5B Updates** | CIS Old and New UI Crosswalk

Grantee Information

Program Director: [Redacted]

Program Contact: [Redacted]

Grantee Address: [Redacted]

Monitored CIS Options

These type of updates do not generate a Notice of Award (NoA) or Notice of Look-Alike Designation (NLD) but do require HRSA's approval before the change is posted to scope. Select this option if you want to do any of the following types of updates noted below.

5A Attributes

Update required services (View Allowable Updates)

Update additional services (View Allowable Updates)

5B Attributes

Addition of Admin Only Site

Deletion of Admin Only Site

Update PO monitored attributes (View List of Attributes)

- Click the **Save** button to save the information and view any errors on this page.
- Click **Save and Continue** button to proceed to the next form. If the Section status is 'Not Complete,' click on 'Update' under the 'Options' column in the table below to complete Form 5B.

Below are the details of the allowed 5B updates through Monitored CIS, Formal CIS and Self-Updates:

➤ **PO Monitored CIS Attributes:**

The following 'Monitored' attributes can be updated through a 'PO Monitored' CIS request. Please note that as part of a 'PO Monitored' CIS, 'Direct Self-update' site attributes may also be updated but at least one 'Monitored' attribute will need to be changed for the request to be complete.

- Location Type (change allowed only between Seasonal and Permanent)
- Site Operated By
- Subrecipient/Contractor Organization Name
- Subrecipient/Contractor EIN
- Service Area Zip Codes
- Total Hours of Operation
- Months of Operation
-

➤ **Formal CIS (Essential) Attributes:**

The following 'Essential' attributes can only be changed through a Formal CIS request. Please note that as part of a Formal CIS, 'Monitored' and 'Direct Self-update' site attributes may also be updated but at least one 'Essential' attribute will need to be changed for the request to be complete.

- Site Type
- Physical Site Address (can only be modified by Scope Admin)

➤ **Direct Self Update Attributes:**

The following 'Direct Self Update' attributes can be updated through the 'Sites' option in the 'Approved Scope' menu. Please note that these attributes may also be modified as part of a 'Formal' or 'PO Monitored' CIS request.

- Site Name
- Site Type (change allowed only between Admin/Service Delivery and Service Delivery)
- Number of Contract Service Delivery Locations
- Number of Intermittent Sites
- Site Setting
- Web URL
- FQHC Site Medicare Billing Number Status
- FQHC Site Medicare Billing Number
- FQHC Site National Provider Identification (NPI) Number
- Site Phone Number
- Subrecipient or Contractor Physical Address

Updates to the following two fields are not permitted:

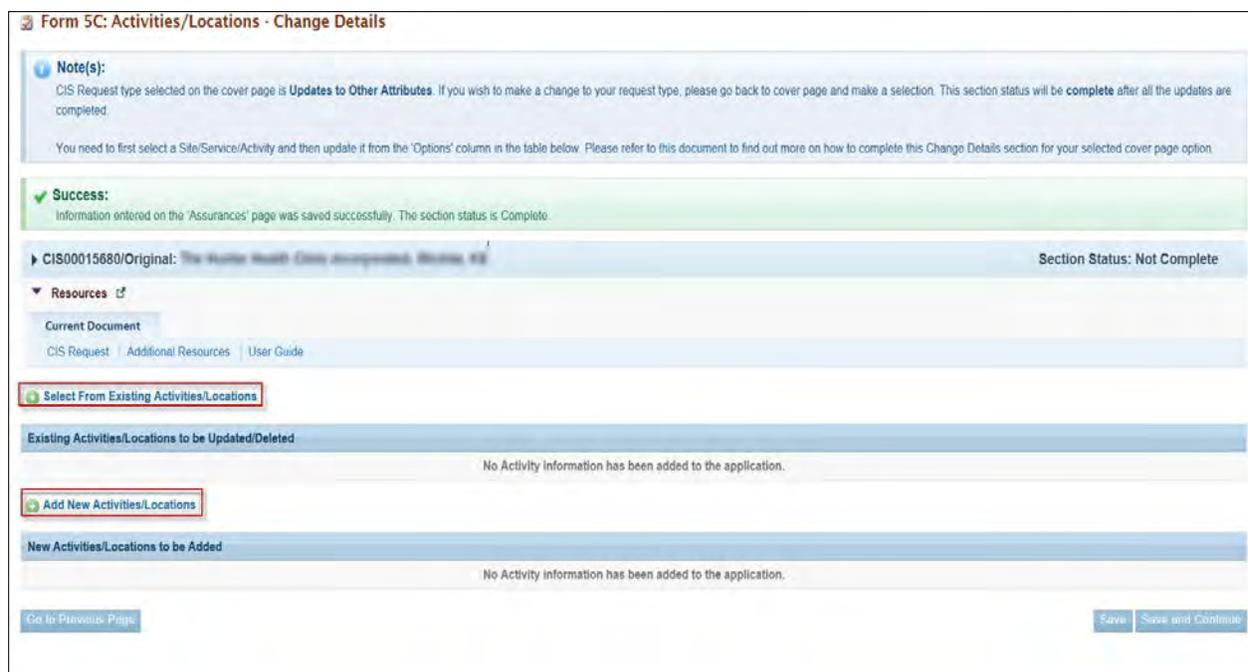
- Date Site was Added to Scope: The field is pre-populated with the PAO approval date, once available.
- Site Operational Date:
 - For 330 grants:
 - The field is pre-populated with the date verified upon successful verification, once available.

- For all Monitored CIS and Admin initiated formal site/service requests, the field is pre-populated with the 'Date Site was Added to Scope.'
- When the verification date is unavailable, the system shall default the date to 'Date Site was Added to Scope'
- For Look-Alikes: The field is pre-populated with the 'Date Site was Added to Scope'

3.3.3. Monitored CIS – Updates to Other Attributes

1. To complete the change details page for 'Update to Other Attributes' CIS type, the system displays the **Form 5C: Activities/Locations - Change Details Page**.

Figure 40: Form 5C: Activities/Locations - Change Details Page



Form 5C: Activities/Locations - Change Details

Note(s):
 CIS Request type selected on the cover page is **Updates to Other Attributes**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to this document to find out more on how to complete this Change Details section for your selected cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS00015680/Original: The Human Health Clinic Accommodated, Waiver, 42 Section Status: Not Complete

Resources [↗](#)

Current Document
 CIS Request | Additional Resources | User Guide

Select From Existing Activities/Locations

Existing Activities/Locations to be Updated/Deleted
 No Activity information has been added to the application.

Add New Activities/Locations

New Activities/Locations to be Added
 No Activity information has been added to the application.

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

2. Either you may update the activities/location by selecting it from the list of existing activities/location or you may add new activities/location.
3. To update the existing activities/location, click the **Select From Existing Activities/Location** button.
 - The system displays the existing activities and locations section.

Figure 41: List of Existing Activities/Locations

Form 5C: Activities/Locations - Change Details

Note(s):
 CIS Request type selected on the cover page is **Updates to Other Attributes**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to this document to find out more on how to complete this Change Details section for your selected cover page option.

CIS00015680/Original: [The Hunter Health Clinic Recruitment Strategy, 6/8](#) Section Status: Not Complete

Resources

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#)

Select	Type of Activity	Frequency of Activity	Description of Activity	Type of Location(s) where Activity is Conducted
<input type="checkbox"/>	Immunizations	Immunizations are given daily on-site at clinic locations. Immunizations are also part of health outreach, education, and health fair activities on approximately a monthly basis.	Immunizations (e.g., flu, pneumovax, childhood, etc.) are offered on-site at clinic locations as well as at various community outreach events as a way to increase access to vital preventive health care.	clinic locations, community health fairs, university campuses, homeless shelters, churches, daycares/preschools, shopping malls, powwows,
<input type="checkbox"/>	Non-Clinical Outreach	approximately 1,000 times annually	Examples of non-clinical outreach conducted by Hunter Health include assistance connecting individuals with needed social services, educating individuals on available primary health care services, public schools, etc.	community recreation events, health fairs, shopping malls, gay bars, homeless shelters, public housing units, college campuses, churches
<input type="checkbox"/>	Hospital Admitting	approximately 50 - 100 occurrences annually	On occasion, one of Hunter's primary care physicians (MD or DO) has medical reason to admit a patient to a local hospital. Once admitted, patients are followed by a Family Practice resident. Upon release from the hospital, patients are discharged back into the care of Hunter's admitting physician. One exception to this practice is that Hunter's medical director, pediatrician, both admits patients and follows their care while in the hospital.	hospital setting
<input type="checkbox"/>	Health Education	100 - 200 times annually	Staff provide health education/information to individuals and organizations in community settings. Standardized education materials are used for distribution and specific clinical questions are fielded by appropriate clinical staff.	health fairs, powwows, shopping malls, churches, college campuses, homeless shelters, public housing units, gay bars, halfway houses, tribal communities
<input type="checkbox"/>	Portable Clinical Care	approximately 50 times annually	Hunter Health Clinic's dental department uses portable hygiene equipment in community and off-site clinical settings to provide oral hygiene services to underserved populations.	homeless shelters, satellite clinics, health departments in outlying counties, college campuses, churches, nursing homes, assisted living facilities, health fairs
<input type="checkbox"/>	Medical Rounds	approximately 300 annually	Hunter's medical director, pediatrician, makes regular hospital rounds to follow newborns delivered by Hunter's OB residents.	hospital setting
<input type="checkbox"/>	Home Visits	approximately 500 - 1,000 home visits annually	Hunter has several programs that provide home visits as part of their service delivery: teen pregnancy, Asian American/Pacific Islander, and diabetes prevention outreach. Home visit activity include, but is not limited to, education and case management.	single-dwelling homes, apartments, assisted living homes, public housing
<input type="checkbox"/>	Health Fairs	approximately 24 per year	Hunter's clinical and outreach staff participate in health fair activities throughout the year. General health screenings (e.g., blood pressure, blood sugar, oral health, etc.) are provided with referrals for recommended care given on an as needed basis. Educational information is distributed at each health fair.	shopping malls, powwow, college campuses, community recreation activities, churches

[CAUTION](#) [Save and Continue](#)

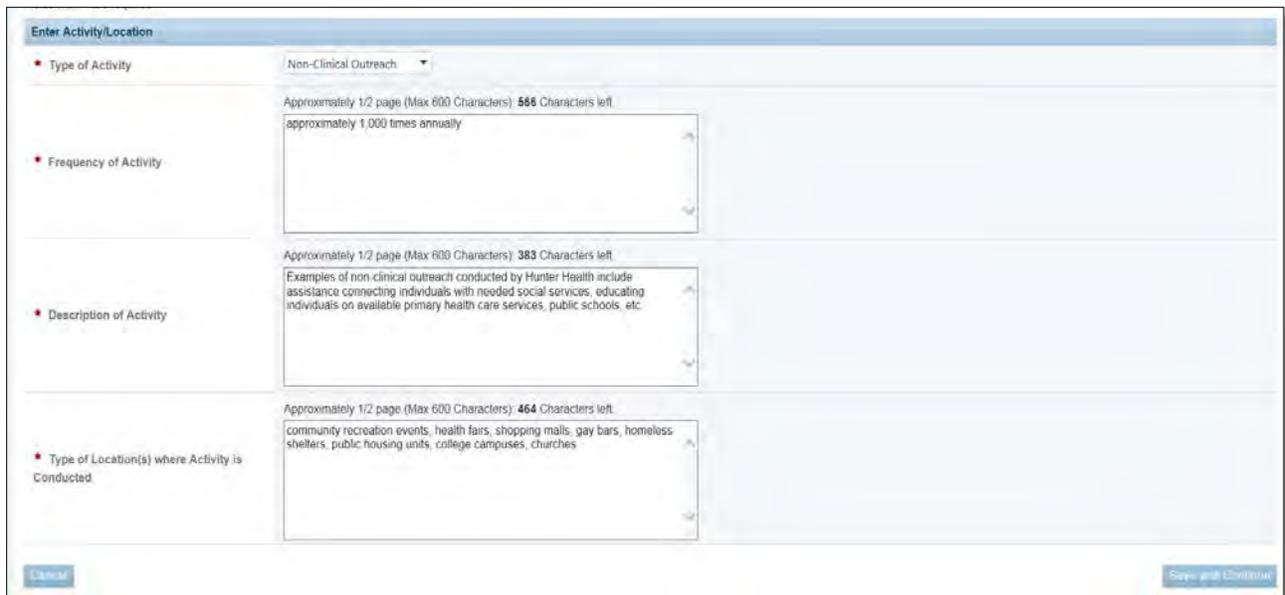
4. Select activities/location by selecting the checkbox(es), click the **Save and Continue** button to proceed.
5. You may either wish to Update or terminate the activity/location you have selected by clicking the appropriate link in the options column.

Figure 42: Context Menu for selected Activities/Locations

Type of Activity	Description of Activity	Type of Location(s) where Activity is Conducted	Activity Action Status	Options
Non-Clinical Outreach	Examples of non-clinical outreach conducted by Hunter Health include assistance connecting individuals with needed social services, educating individuals on available primary health care services, public schools, etc.	community recreation events, health fairs, shopping malls, gay bars, homeless shelters, public housing units, college campuses, churches	Not Changed	Update Mark as Terminate Remove from Application
Immunizations	Immunizations (e.g., flu, pneumovax, childhood, etc.) are offered on-site at clinic locations as well as at various community outreach events as a way to increase access to vital preventive health care.	clinic locations, community health fairs, university campuses, homeless shelters, churches, daycares/preschools, shopping malls, powwows,	Not Changed	

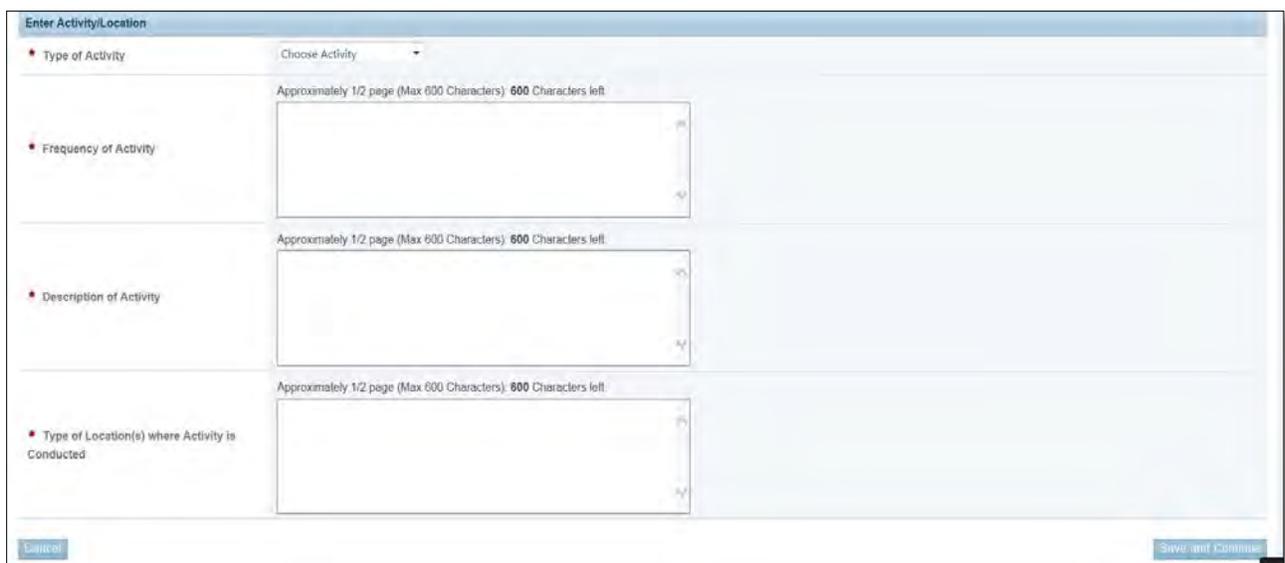
6. For 'Update,' the system displays the editable page to update the information for the activity/location selected.

Figure 43: Form 5C: Activities/Locations – Update Page



7. For 'Mark as terminate' and 'Remove from Application' options, the system displays the confirmation page to confirm the termination of activity /location or to remove the selection of activity/location from the application.
8. If you choose to add a new activity/location, click the **Add New Activities/Locations** button
 - The system displays a section to enter the activity/location details.

Figure 44: Form 5C: Activities/Locations – Add Page



9. Click the **Save and Continue** button to save the information and continue to next section.
10. You may choose to update more than one activity/location by repeating the above steps.

3.3.4. Formal CIS - Add a New Service to Scope

To view the allowable updates click the [Allowable Updates](#) link in the Resources section.

Figure 45: List of Allowable Updates

List of Service updates allowed through Formal CIS Requests:					
Original Service Delivery Method (FROM)			Allowable Service Delivery Method (TO)		
Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Delete Service - Health Center Stops Paying for Required/Additional/Specialty Service(s)					
x					x
x	x				x
x	x	x			x
x		x			x
	x				x
		x			x
Add Service - Health Center Starts Paying for Required/Additional/Specialty Service(s)					
		x	x	x	x
		x	x	x	
		x	x		
		x		x	
		x	x		x
		x		x	x

3.3.4.1. Section 1

You can complete the following sub type requests by following the steps outlined in this section.

- Add Required Service by Changing Service Delivery Method (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., health center starts paying/billing for service)
- Add Missing Required Service (Can be provided via Column I, II and/or III)
- Add Additional Service by Changing Service Delivery Method (Service presently recorded ONLY on Form 5A Column III and will be recorded in Columns I and/or II, i.e., health center starts paying/billing for service)

Figure 46: Change Details Page

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Add Required Service by Changing Service Delivery Method** (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., health center starts paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

▶ CIS000
Section Status: Not Complete

▼ Resources [↗](#)

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

[Select Service from List](#)

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
No Service information has been added to the application.							

[Go to Previous Page](#)

[Save](#) | [Save and Continue](#)

Steps to complete the sub request types listed above:

1. To complete this form, click the **Select Service from List** link.
2. Select one of the services from the **Select Required Services – To be Updated** section by clicking on the Select Service.

Figure 47: Form 5A: Select Required Services Section

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is Add Required Service by Changing Service Delivery Method (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., health center starts paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS00 Section Status: Not Complete

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Select Required Services - To be Updated

Service Type	Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
General Primary Medical Care	X			Select Service
Diagnostic Laboratory	X	X		Select Service
Diagnostic Radiology			X	Select Service
Screenings	X		X	Select Service
Coverage for Emergencies During and After Hours	X		X	Select Service
Voluntary Family Planning	X			Select Service
Immunizations	X			Select Service
Well Child Services	X			Select Service
Gynecological Care	X		X	Select Service
Obstetrical Care				
Prenatal Care			X	Select Service
Intrapartum Care (Labor & Delivery)			X	Select Service
Postpartum Care			X	Select Service
Preventive Dental	X			Select Service
Pharmaceutical Services		X		Select Service
Case Management	X		X	Select Service
Eligibility Assistance	X			Select Service
Health Education	X		X	Select Service
Outreach	X			Select Service
Transportation	X		X	Select Service
Translation	X			Select Service

[Cancel](#)

- Update the Service Delivery Method(s) of the service by clicking on 'Update' under the 'Options' column in the table below.

Figure 48: Form 5A: Selected Required Service Section

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Add Required Service by Changing Service Delivery Method** (Service presently recorded **ONLY** on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., **health center starts paying/billing for service**). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS#0019412/Original: VERNON J. HARRIS EAST END CHC, RICHMOND, VA **Section Status: Not Complete**

Grant Number: **HHDC000174** BHCMS ID: **037100** Project Period: 1/1/2002 - 12/31/2017
 Withdrawal Requested: **N/A** Created By: **tracy.courney on 3/17/2014 1:27:54 PM** Submitted By: **N/A**

Resources

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
Diagnostic Radiology			X			X	 Update

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

- The system displays the 'Update Required Services' page. Update the Service Delivery Method(s) provision as applicable and 'Save and Continue' to proceed.

Figure 49: Update Services Section

Update Required Services

Note(s):
 CIS Request type selected on the cover page is Add Required Service by Changing Service Delivery Method (Service presently recorded ONLY on Form 5 - Part A Column III will be recorded on Columns I and/or II, i.e., health center starts paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

Warning:
 If you make any change to Service Mode of Provision in this section from your original selection, the corresponding questions on the Change checklist will be reset and any previously provided information will be lost.

CIS00 Section Status: Not Complete

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Service Type	Service Delivery Methods		
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Diagnostic Radiology			X

Service Type	Service Delivery Methods		
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Diagnostic Radiology	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

3.3.4.2. Section 2

You can complete the following sub type requests by following the steps outlined in this section.

- Add Additional Service (Service NOT Previously recorded in scope via any service delivery method)
- Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)

Steps to complete the above-mentioned sub request type:

1. To complete the above mentioned sub requests on the Change Details Page, click the **Add New Service** button.

Figure 50: Add New Service

▶ CIS000 Section Status: Not Complete
▼ Resources
Current Document
CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

Add New Service

Service Type	Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
No Service information has been added to the application.				

Go to Previous Page Save Save and Continue

- The system displays the Add New Service section on the change details page.

Figure 51: Add New Service

Form 5A: Additional Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Add Additional Service (Service NOT Previously recorded in scope via any service delivery method)**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.
 Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

▶ CIS000 Section Status: Not Complete
▼ Resources
Current Document
CIS Request | Additional Resources | User Guide | Allowable 5A Updates | Allowable 5B Updates | CIS Old and New UI Crosswalk

Add Additional Service

Service Type	Service Delivery Methods		
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
<div style="border: 1px solid red; padding: 2px;">Choose Service</div>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If Other, Specify <input type="text"/>			

Cancel Save and Continue

- Select one of the services from the drop down and enter the Service Delivery Method(s) of the service. The system displays the record added. You may choose to update or Remove this from the CIS request.

Figure 52: Update or Remove - Added Service

Form 5A: Additional Services - Change Details

Note(s):
 CIS Request type selected on the cover page is Add Additional Service (Service NOT Previously recorded in scope via any service delivery method). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.
 Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS000 Section Status: Complete

Resources
 Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Service Type	Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
Speech-Language Pathology/Therapy		X		Update Remove from CIS Request

[Go to Previous Page](#)

3.3.5. Formal CIS - Delete an Existing Service from Scope

3.3.5.1. Section 1

You can complete the following sub type request by following the steps outlined in this section.

- Change Service Delivery Method for Additional Service, including Specialty Service (Service presently recorded on Form 5A Column I and/or II will be recorded ONLY in Column III, i.e., health center stops paying/billing for service)
- Change Service Delivery Method for Required Service (Service presently recorded on Form 5A Column I and/or II will be recorded ONLY in Column III, i.e., health center stops paying/billing for service)
- To view the allowable updates you can click on the [Allowable 5A Updates](#) link in the Resources section.

Figure 53: Service Updates

List of Service updates allowed through Formal CIS Requests:					
Original Service Delivery Method (FROM)			Allowable Service Delivery Method (TO)		
Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)
Delete Service - Health Center Stops Paying for Required/Additional/Specialty Service(s)					
X					X
X	X				X
X	X	X			X
X		X			X
	X				X
	X	X			X
Add Service - Health Center Starts Paying for Required/Additional/Specialty Service(s)					
		X	X	X	X
		X	X	X	
		X	X	X	
		X	X		X
		X		X	X

Steps to complete the above mentioned sub types:

1. Click the **Select Service from List** button on the **Change Details** page

Figure 54: Change Details

Form 5A: Additional Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Change Service Delivery Method for Additional Service, including Specialty Service** (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded **ONLY** on Column III, i.e., **health center stops paying/billing** for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be complete after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS000 Section Status: Not Complete

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Select Service from List

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
No Service information has been added to the application.							

[Go to Previous Page](#)

[Save](#) [Save and Continue](#)

2. The system displays the **Select Services - To be Updated** section on this page. Select one of the services by clicking the **Select a Service** link.

Figure 55: Form 5A

Form 5A: Additional/Specialty Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Change Service Delivery Method for Additional Service, including Specialty Service** (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded **ONLY** on Column III, i.e., health center stops paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS000 Section Status: Not Complete

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Select Additional/Specialty Services - To be Updated

Service Type	Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
Additional Services				
Additional Dental Services	X			Select Service
Behavioral Health Services				
Mental Health Services	X			Select Service
Environmental Health Services	X			Select Service
Nutrition	X			Select Service
Specialty Services				
Cardiology	X			Select Service

[Cancel](#)

- The system displays the record selected from the list; click the **Update** link to update the Service Delivery Method(s) of the service.

Figure 56: Form 5A: Updating a Service

Form 5A: Additional Services - Change Details

Note(s):

CIS Request type selected on the cover page is **Change Service Delivery Method for Additional Service, including Specialty Service** (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded **ONLY** on Column III, i.e., health center stops paying/billing for service). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

CIS000 Section Status: Not Complete

Resources

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
Additional Dental Services	X			X			<div style="border: 1px solid red; padding: 2px;"> Action <input type="button" value="Update"/> <input type="button" value="Remove from CIS Request"/> </div>

[Go to Previous Page](#)

3.3.5.2. Section 2

You can complete the following sub type request by following the steps outlined in this section.

- Delete Additional Service, Including Specialty Service from Scope (Service presently recorded on Form 5 - Part A Column I, II and/or III will be removed from scope entirely)

Steps to complete the above-mentioned sub request type:

1. To complete the above mentioned sub requests on the **Change Details** Page, click the **Select Service from List** button.

Figure 57: Form 5A: Select Service from List

Form 5A: Required Services - Change Details

Note(s):
 CIS Request type selected on the cover page is **Change Service Delivery Method for Required Service** (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded **ONLY** on Column III, i.e., **health center stops paying/billing for service**). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS0001 Section Status: Not Complete

Resources

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Select Service from List

Service Type	Original Service Delivery Methods			Updated Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
No Service information has been added to the application.							

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

- The system displays the **Select Service - To be Updated** section on this page. Select one of the services by clicking the **Select a Service** link.

Figure 58: Select Service To Update Section

Form 5A: Required Services - Change Details

Note(s):

CIS Request type selected on the cover page is **Change Service Delivery Method for Required Service** (Service presently recorded on Form 5 - Part A Column I and/or II will be recorded **ONLY** on Column III, i.e., **health center stops paying/billing for service**). If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Based on your existing services and their modes of provision in Scope, you may be unable to select some or all of the services listed below. This does not apply to the 'Add Additional Specialty Service (Service NOT previously recorded in scope via any service delivery method)' cover page option.

► CIS000: PROVIDER/ORGANIZATION INFORMATION & SERVICE DELIVERY METHOD INFORMATION

Section Status: Not Complete

▼ Resources [↗](#)

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

Select Required Services - To be Updated

Service Type	Service Delivery Methods			Options
	Column I. Direct (Health Center Pays)	Column II. Formal Written Contract/Agreement (Health Center Pays)	Column III. Formal Written Referral Arrangement (Health Center DOES NOT pay)	
General Primary Medical Care	X			Select Service ▼
Diagnostic Laboratory				Select Service ▼
Diagnostic Radiology	X		X	Select Service ▼
Screenings	X	X	X	Select Service ▼
Coverage for Emergencies During and After Hours	X			Select Service ▼
Voluntary Family Planning	X			Select Service ▼
Immunizations	X			Select Service ▼
Well Child Services	X			Select Service ▼
Gynecological Care	X			Select Service ▼
Obstetrical Care				
Prenatal Care	X			Select Service ▼
Intrapartum Care (Labor & Delivery)	X			Select Service ▼
Postpartum Care	X			Select Service ▼
Preventive Dental	X			Select Service ▼
Pharmaceutical Services	X			Select Service ▼
HCH Required Substance Abuse Services	X		X	Select Service ▼
Case Management	X			Select Service ▼
Eligibility Assistance	X			Select Service ▼
Health Education	X			Select Service ▼
Outreach	X			Select Service ▼
Transportation	X	X	X	Select Service ▼
Translation	X	X		Select Service ▼

Cancel

- The system displays the record selected from the list; click the **Delete Service** link to delete the service. The system displays a confirmation screen for the delete activity.

Figure 61: Form 5B: Site Location Setting Page

Site Location Setting - Choose

Note(s):
CIS Request type selected on the cover page is **Add a New Service Delivery Site to Scope**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

CIS00015568/Original: The Health Health Clinic, Incorporated, Wichita, KS Section Status: Not Complete

Resources

Current Document
CIS Request | Additional Resources | User Guide

Fields with * are required

Choose Site Location Setting

Confidential Site: A Confidential Site will have an approximate address instead of an exact address in order to protect the location. Domestic Violence Shelters are often regarded as Confidential Sites. The address of such Service Sites are not disclosed or published to protect the identity of the victims being served at those locations.
Non-Confidential Site: A Non-Confidential Site may have an approximate address or an accurate address. The Site address is published as it is provided by the Health Centers while registering the site in EHB.

* Is the site a Domestic Violence (Confidential) shelter? Yes No

[Cancel](#) [Continue](#)

3. The system displays the **List of Sites Registered at HRSA – List** page.

Figure 62: List of Pre- Registered Performance Sites at HRSA

The following sites are pre-registered at HRSA level within your organization. Note that not all of the sites below are in your approved Scope of Project. Some of the sites may be disabled for selection due to one of the following reasons:

- If the site is already included in the current application.
- If the site is already in applicant's HBD scope.
- If the site is a Mobile site and applicant is trying to propose an "Admin-only" site.
- If the site is a confidential site and the applicant is trying to propose a non-confidential/non-domestic violence site.
- If the site is a non-confidential site and the applicant is trying to propose a confidential domestic violence site.

For more information about the allowable actions on this page, refer to these [Instructions](#).

[Register Performance Site](#)

List of Pre-registered Performance Sites

Site Name	Performance Site Type	Performance Site Address	Performance Site Address Category	Options
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Approximate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location
Health Health Clinic, Incorporated, Wichita, KS	Fixed	201 N. 20th Street, Wichita, KS 67202	Accurate	Select Site Location

[Cancel](#)

4. You can select one of the listed performance sites by either selecting a site by clicking the **Select Site Location** link or registering the site by clicking the **Register Performance Site** button. You can select the newly registered site from the updated list of performance sites.

- The system display the **Form 5B: Edit Page**. Provide the required information on this page.

Figure 63: Form 5B: Edit Page

Form-5B : Edit

Note(s):
It is recommended that you save your work often (e.g., every 5 minutes) to avoid a loss of data due to unforeseeable technical issues.

Warning:
If you change the Site Operator selection, certain questions on the Checklist will be reset and any previously provided information will be lost.

Fields with * are required for all site types.

Site Information Status: Not Started

* Site Name [Change Site Name](#) * Physical Site Address [Change Location](#)

* Site Type [Select Site Type](#) * Site Phone Number () - Ext.

Web URL

The following fields are required for "Service Delivery" and "Administrative/Service Delivery" site types, other than where exceptions are noted:

* Location Type [Select Location Type](#) * Site Setting [Select Site Setting](#)

Date Site was Added to Scope N/A Site Operational Date

* FQHC Site Medicare Billing Number Status [Select Medicare Billing Number Status](#) FQHC Site Medicare Billing Number (Required if "This site has a Medicare billing number" is selected in "FQHC Site Medicare Billing Number Status" field.) e.g. 12345 OR 123456

FQHC Site National Provider Identification (NPI) Number (Optional field.) e.g. 1234567890

Months of Operation

Saved Months of Operation

Number of Contract Service Delivery Locations (Required only for 'Migrant Voucher Screening' Site Type)

Number of Intermittent Sites (Required only for 'Intermittent' Site Type)

* Site Operated by [Select Site Operated By](#)

[Add Subrecipient/Contractor](#)

Subrecipient or Contractor Information (Required only if 'Subrecipient or Contractor' is selected in 'Site Operated By'... [\(+ View More\)](#))

Subrecipient/Contractor Organization Name	Subrecipient/Contractor Organization Physical Site Address	Subrecipient/Contractor EIN	Options
No Subrecipient or Contractor information to be displayed			

Service Area Zip Code (Include only those from which the majority of the patient population will come)

* Service Area Zip Codes

[Save Zip Code\(s\)](#)

Saved Service Area Zip Code(s)

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

5. Click **Save and Continue** button to save the information and proceed to the next form.

Note: Updates to the following two fields are not permitted:

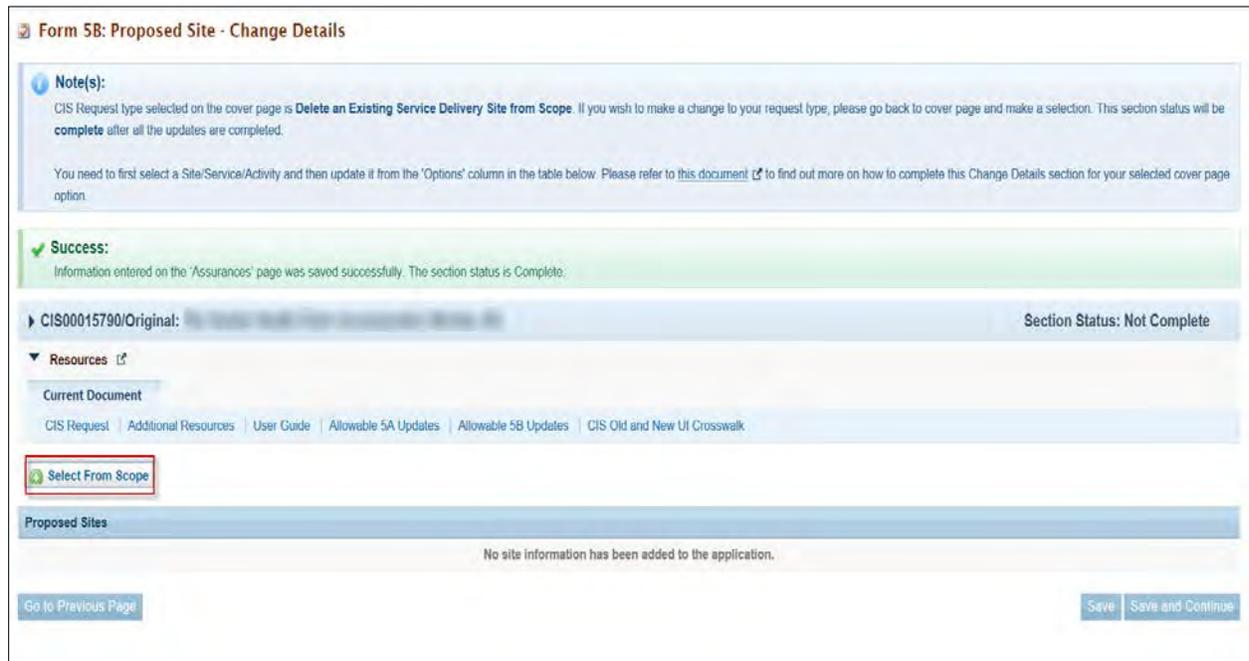
- 'Date Site was Added to Scope': The field is pre-populated with the PAO approval date, once available.
- 'Site Operational Date':
 - For 330 grants:
 - The field is pre-populated with the date verified upon successful verification, once available.
 - For all Monitored CIS and Admin initiated formal site/service requests, the field is pre-populated with the 'Date Site was Added to Scope.'

- When the verification date is unavailable, the system shall default the date to 'Date Site was Added to Scope'
 - For Look-Alikes:
 - The field is pre-populated with the 'Date Site was Added to Scope'

3.3.7. Formal CIS - Delete an Existing Service Delivery Site from Scope

1. To complete the 'Delete an Existing Service Delivery Site from Scope' CIS request, the system displays the **Form 5B: Proposed Site - Change Details** page.

Figure 64: Form 5B: Select From Scope



Form 5B: Proposed Site - Change Details

Note(s):
 CIS Request type selected on the cover page is **Delete an Existing Service Delivery Site from Scope**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.
 You need to first select a Site/Service/Activity and then update it from the 'Options' column in the table below. Please refer to [this document](#) to find out more on how to complete this Change Details section for your selected cover page option.

Success:
 Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS00015790/Original: [Redacted] Section Status: Not Complete

Resources [↗](#)

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

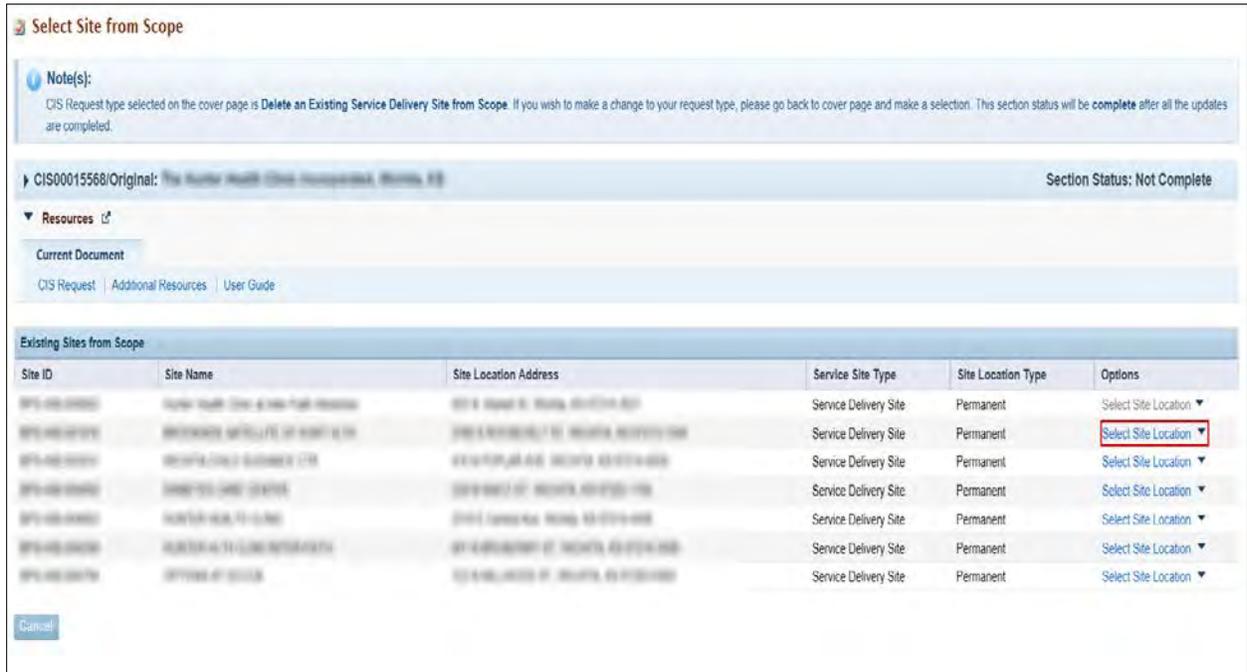
Select From Scope

Proposed Sites
 No site information has been added to the application.

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

2. Click the **Select from Scope** button on **Form 5B: Proposed Site - Change Details** page.
3. The system displays the list of Existing sites in Scope; choose the site to delete by clicking the **Select Site Location** link from list.

Figure 65: List of Existing Sites from Scope



Select Site from Scope

Note(s):
CIS Request type selected on the cover page is **Delete an Existing Service Delivery Site from Scope**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

CIS00015568/Original: The Hunter Health Clinic (Hagerstown, Maryland, MD) Section Status: Not Complete

Resources

Current Document
CIS Request | Additional Resources | User Guide

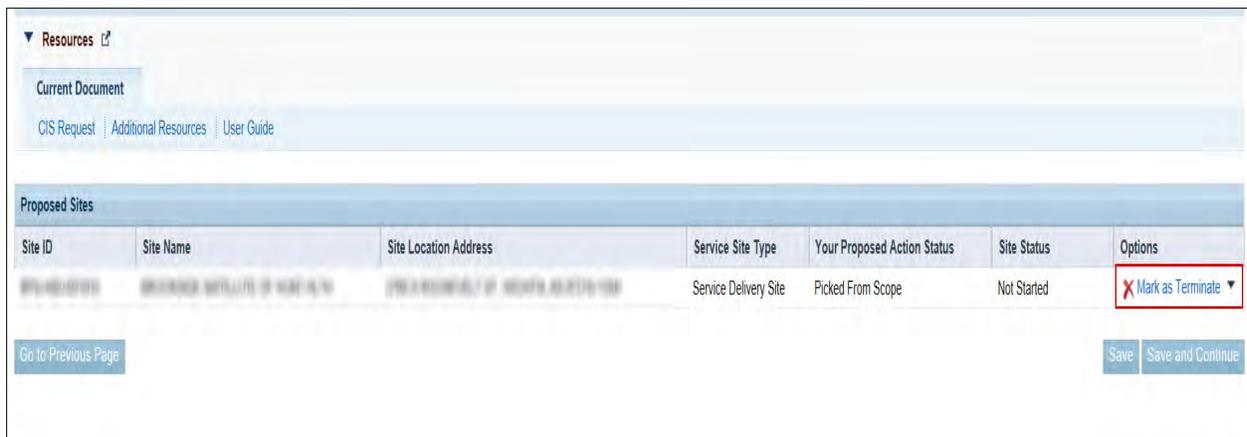
Existing Sites from Scope

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
SPS-00000000	Hunter Health Clinic (Hagerstown, MD)	401 N Market St, Hagerstown, MD 21740-1001	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000001	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000002	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000003	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000004	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000005	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼
SPS-00000006	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Permanent	Select Site Location ▼

Cancel

- The system displays the selected record, to delete the site, click the **Mark as Terminate** link under the Options column in the table, and click on the **Confirm** button to complete this section.

Figure 66: Form 5B: Change Details page



Resources

Current Document
CIS Request | Additional Resources | User Guide

Proposed Sites

Site ID	Site Name	Site Location Address	Service Site Type	Your Proposed Action Status	Site Status	Options
SPS-00000001	WINDWARD HILLS/LEO OF HARTLAND	2282 S WINDWARD ST, HARTLAND, WISCONSIN 53029	Service Delivery Site	Picked From Scope	Not Started	Mark as Terminate ▼

Go to Previous Page Save Save and Continue

3.3.8. Formal CIS Convert an Existing Service Delivery Site or Service Delivery/Admin Site to an Admin-Only Site

- To complete the 'Convert an Existing Service Delivery Site or Service Delivery/Admin Site to an Admin-Only Site' CIS request, the system displays the **Form 5B: Proposed Site - Change Details** page. Click the **Select from Scope** button.

Figure 67: Form 5B: Proposed Site Change Details – Select From Scope

Form 5B: Proposed Site - Change Details

Note(s):
CIS Request type selected on the cover page is **Convert an Existing Service Delivery Site or Service Delivery/Admin Site to an Admin-Only Site**. If you wish to make a change to your request type, please go back to cover page and make a selection. This section status will be **complete** after all the updates are completed.

Success:
Information entered on the 'Assurances' page was saved successfully. The section status is Complete.

CIS00015568/Original: The Center Health Clinic Incorporated, Wichita, KS Section Status: Not Complete

Resources

Current Document
CIS Request | Additional Resources | User Guide

Select From Scope

Proposed Sites
No site information has been added to the application.

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

- The system displays the Select Site from scope page; select the site to convert by clicking the **Select Site Location** link.

Figure 68: Form 5B: Existing Sites from Scope

Resources

Current Document
CIS Request | Additional Resources | User Guide

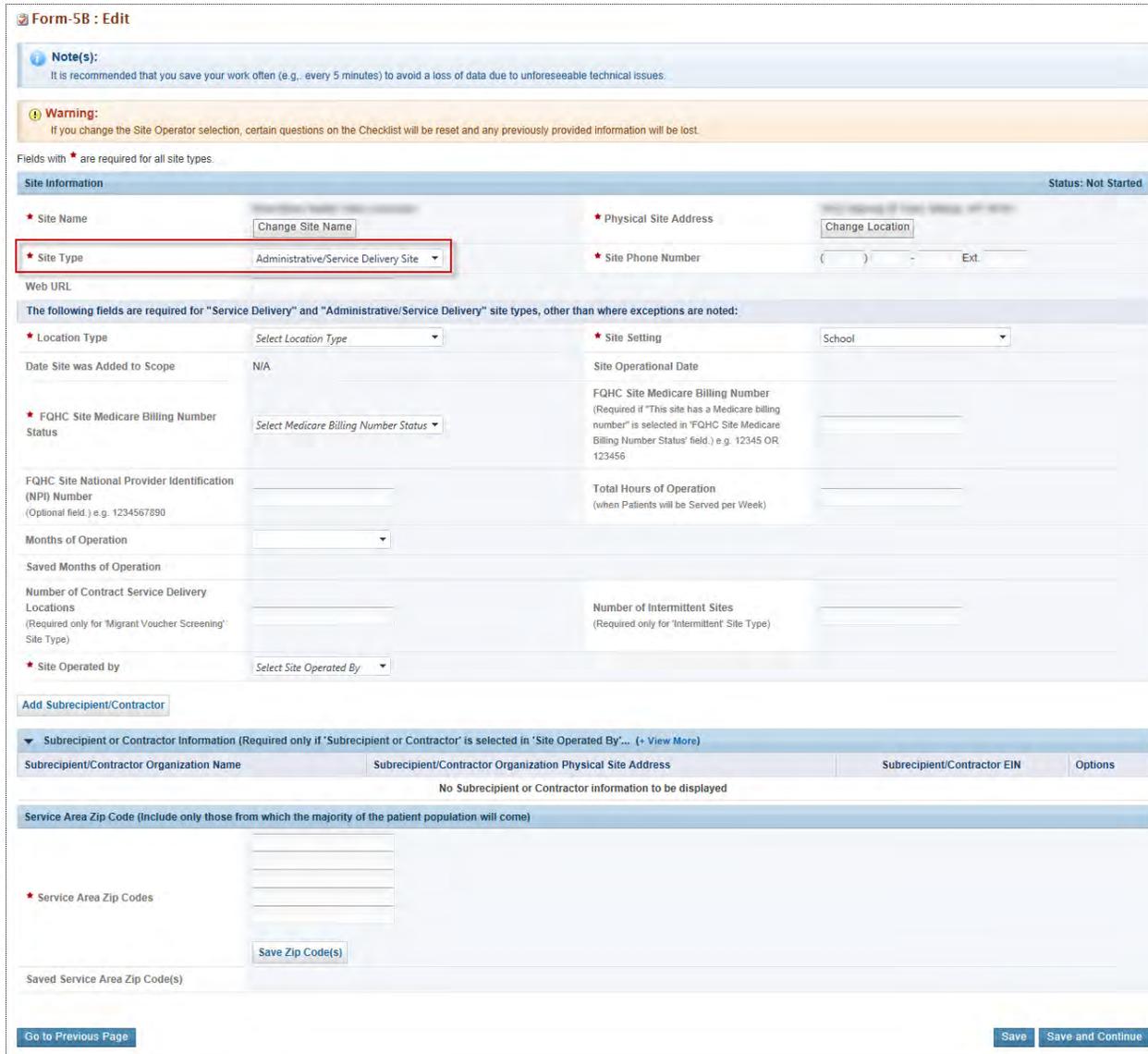
Existing Sites from Scope

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location
000-000-0000	Center Health Clinic Incorporated	200 N. Kansas St, Wichita, KS 67210-1001	Service Delivery Site	Permanent	Select Site Location

[Cancel](#)

- The system displays the **Form5B: Edit** page, change the type in the Service Site Type field to 'Administrative.'

Figure 70: Form 5B: Edit Page



Form-5B : Edit

Note(s):
It is recommended that you save your work often (e.g., every 5 minutes) to avoid a loss of data due to unforeseeable technical issues.

Warning:
If you change the Site Operator selection, certain questions on the Checklist will be reset and any previously provided information will be lost.

Fields with * are required for all site types.

Site Information Status: Not Started

* Site Name * Physical Site Address

* Site Type * Site Phone Number () - Ext.

Web URL

The following fields are required for "Service Delivery" and "Administrative/Service Delivery" site types, other than where exceptions are noted:

* Location Type * Site Setting

Date Site was Added to Scope Site Operational Date

* FQHC Site Medicare Billing Number Status FQHC Site Medicare Billing Number (Required if "This site has a Medicare billing number" is selected in "FQHC Site Medicare Billing Number Status" field.) e.g. 12345 OR 123456

FQHC Site National Provider Identification (NPI) Number (Optional field.) e.g. 1234567890 Total Hours of Operation (when Patients will be Served per Week)

Months of Operation

Saved Months of Operation

Number of Contract Service Delivery Locations (Required only for 'Migrant Voucher Screening' Site Type) Number of Intermittent Sites (Required only for 'Intermittent' Site Type)

* Site Operated by

[Add Subrecipient/Contractor](#)

Subrecipient or Contractor Information (Required only if 'Subrecipient or Contractor' is selected in 'Site Operated By'... [\(+ View More\)](#))

Subrecipient/Contractor Organization Name	Subrecipient/Contractor Organization Physical Site Address	Subrecipient/Contractor EIN	Options
No Subrecipient or Contractor information to be displayed			

Service Area Zip Code (Include only those from which the majority of the patient population will come)

* Service Area Zip Codes

[Save Zip Code\(s\)](#)

Saved Service Area Zip Code(s)

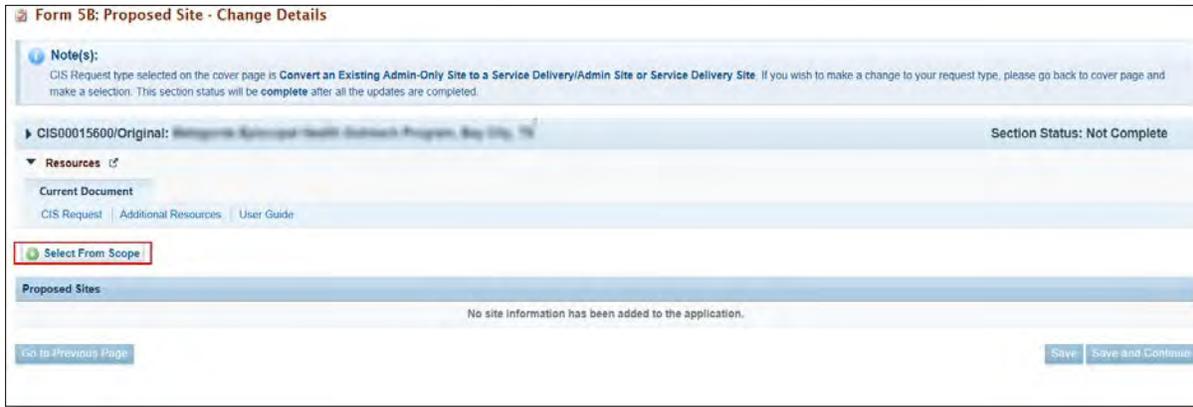
[Go to Previous Page](#) [Save](#) [Save and Continue](#)

- You may click 'Save' to view any errors on this page. Click 'Save and Continue' to move forward. If the Section status is "Not Complete," click on 'Update' under the 'Options' column in the table below to complete Form 5B.

3.3.9. Formal CIS Convert an Existing Admin-Only Site to a Service Delivery/Admin Site or Service Delivery Site

1. To complete the 'Convert an Admin-Only Site to a Service Delivery Site or Service Delivery/Admin Site' CIS request, the system display the **Form 5B: Proposed Site - Change Details** page. Click on the **Select from Scope** button.

Figure 71: Form 5B: Select Site From Scope



2. The system displays the Select Site from scope page, select the site to convert by clicking the **Select Site Location** link.

Figure 72: Form 5B: Existing Sites from Scope

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
000000001	HRSA Denver and Denver	1100 South Dear St, Denver, CO 80202	Service Delivery Site	Permanent	Select Site Location ▼
000000002	HRSA Los Angeles	200 W. Broad St, Los Angeles, CA 90012	Administrative	Permanent	Select Site Location ▼
000000003	HRSA Denver Health	1600 Arapahoe St, Denver, CO 80202	Service Delivery Site	Permanent	Select Site Location ▼
000000004	HRSA Mobile Health Unit	100 W. Dear St, Denver, CO 80202	Service Delivery Site	Mobile Van	Select Site Location ▼
000000005	HRSA Denver	1100 South Dear St, Denver, CO 80202	Service Delivery Site	Permanent	Select Site Location ▼
000000006	HRSA Denver	100 W. Dear St, Denver, CO 80202	Service Delivery Site	Permanent	Select Site Location ▼

Cancel

3. The system displays the selected site, click the **Update** link under the 'Options' column in the table.

Figure 74: Form 5B: Edit Page

Form-5B : Edit

Note(s):
It is recommended that you save your work often (e.g., every 5 minutes) to avoid a loss of data due to unforeseeable technical issues.

Warning:
If you change the Site Operator selection, certain questions on the Checklist will be reset and any previously provided information will be lost.

Fields with * are required for all site types.

Site Information Status: Not Started

* Site Name * Physical Site Address

* Site Type * Site Phone Number () - - Ext.

Web URL

The following fields are required for "Service Delivery and Administrative/Service Delivery" site types, other than where exceptions are noted:

* Location Type * Site Setting

Date Site was Added to Scope Site Operational Date

* FQHC Site Medicare Billing Number Status FQHC Site Medicare Billing Number (Required if "This site has a Medicare billing number" is selected in "FQHC Site Medicare Billing Number Status" field.) e.g. 12345 OR 123456

FQHC Site National Provider Identification (NPI) Number (Optional field.) e.g. 1234567890

Total Hours of Operation (when Patients will be Served per Week)

Months of Operation

Saved Months of Operation

Number of Contract Service Delivery Locations (Required only for 'Migrant Voucher Screening' Site Type)

Number of Intermittent Sites (Required only for 'Intermittent' Site Type)

* Site Operated by

Add Subrecipient/Contractor

Subrecipient or Contractor Information (Required only if 'Subrecipient or Contractor' is selected in 'Site Operated By'... (+ View More))

Subrecipient/Contractor Organization Name	Subrecipient/Contractor Organization Physical Site Address	Subrecipient/Contractor EIN	Options
No Subrecipient or Contractor information to be displayed			

Service Area Zip Code (Include only those from which the majority of the patient population will come)

* Service Area Zip Codes

Saved Service Area Zip Code(s)

5. You may click the **Save** button to view any errors on this page. Click the **Save and Continue** button to move forward. If the Section status is "Not Complete," click the **Update** link under the 'Options' column in the table below to complete Form 5B.

3.3.10. Formal CIS Replace an Existing Service Delivery Site with a NEW Service Delivery Site NOT currently in Scope

1. To complete the 'Replace an Existing Service Delivery Site with a NEW Service Delivery Site NOT currently in Scope', the system displays the **Form 5B: Proposed Site – Change Details** page.
2. Select a site from existing sites in scope by clicking on **Select From Existing Sites** button.

Figure 75: Form 5B: Change Details Page

3. The system displays select Site from scope page. Select the site by clicking the **Select Site Location** link. This site will be displayed under the Site to be Replaced ("From" Site) section on this section.

Figure 76: Exiting Sites from Scope

Site ID	Site Name	Site Location Address	Service Site Type	Site Location Type	Options
SPS-140-00002	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00003	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00004	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00005	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00006	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00007	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location
SPS-140-00008	Stuarts Health Clinic at New York University	100 St. Marks St, New York, NY 10003-3001	Service Delivery Site	Permanent	Select Site Location

4. You can add the new replacement site by clicking on the **Add New Site** button or Select an Existing site by clicking the **Select from Existing Sites** button.
5. If you choose to add a new site, the system will navigate to the **Site Location Setting - Choose** page, answer the question on next page for confidential site.

If you proposed adding a new site at a given address but never actually opened it at that address because of say, lease issues, you can use the Replace option to “move” the site to its correct address.

Figure 79: Form 5B: Convert to Admin option

The screenshot shows a web interface for Form 5B. At the top, it displays 'CIS00015602/Original: The Health Health Care Organization, Wichita, KS' and 'Section Status: Not Complete'. Below this is a 'Resources' section with links for 'Current Document', 'CIS Request', 'Additional Resources', and 'User Guide'. The main content area is divided into two tables: 'Site to be Replaced ("From" Site)' and 'Site to be Replaced ("To" Site)'. The 'From' site table has columns for Site ID, Site Name, Site Location Address, Service Site Type, Your Proposed Action Status, Site Status, and Options. The 'Options' dropdown for the 'From' site is open, showing a 'Convert to Admin' option. The 'To' site table has columns for Site ID, Site Name, Site Location Address, Service Site Type, Your Proposed Action Status, Site Status, and Options. The 'Options' dropdown for the 'To' site is open, showing an 'Update' option. At the bottom, there are 'Cancel', 'Save', and 'Save and Continue' buttons.

9. You can either convert the 'From' Site to Admin, by clicking the **Convert to Admin** option under the 'Options' dropdown or delete the site by clicking the **Delete Site** link. Complete the details of the site on the **Form 5B: Edit** page.

Figure 80: Form 5B: Site to be Replaced

The screenshot shows a web interface for Form 5B, similar to Figure 79. The 'Options' dropdown for the 'From' site is open, showing an 'Action' dropdown menu. The 'Action' menu is open, showing options: 'Convert to Admin', 'Delete Site', and 'Remove from Application'. The 'Delete Site' option is highlighted with a red box. The 'To' site table and 'Update' option are also visible. At the bottom, there are 'Cancel', 'Save', and 'Save and Continue' buttons.

10. Verify that the Change Details section status is Complete. Click the Save and Continue to proceed to the Checklist section.

3.3.11. Formal CIS - Add a New Target Population

1. To complete the Add a New Target Population CIS request, the system displays the **Add Target Population - Change Details** page.
2. You can complete this section by selecting one of the options displayed. Click the **Save and Continue** button to proceed.

The population type you are already serving is disabled.

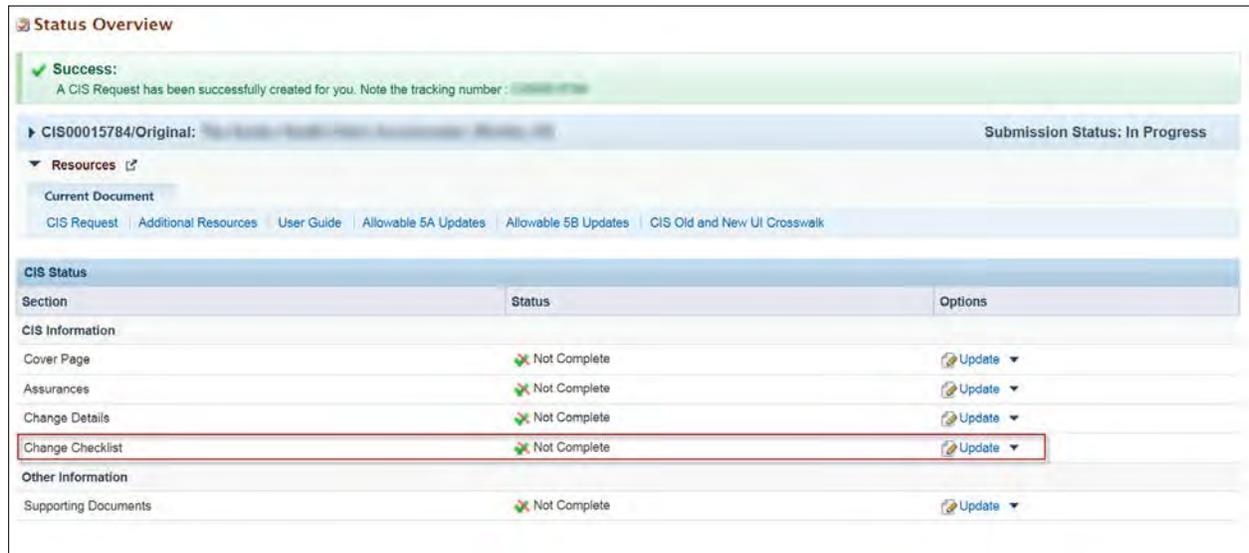
Figure 81: Add Target Population

The screenshot shows the 'Add Target Population' form. It has two main sections: 'Target Population - Currently being Served' and 'Target Population - Proposed to be Added'. The 'Currently being Served' section has two radio button options: 'Migratory and seasonal agricultural farm workers served under MHC Program of section 330(g)' and 'Homeless individuals served under HCH Program of section 330(h)'. The 'Proposed to be Added' section has four radio button options: 'Migratory and seasonal agricultural farm workers served under MHC Program of section 330(g)', 'General medically underserved population served under CH Program of section 330(e)', 'Residents of public housing served under PHPC Program of section 330(i)', and 'Homeless individuals served under HCH Program of section 330(h)'. At the bottom, there are 'Cancel', 'Save', and 'Save and Continue' buttons.

3.4. Checklist

1. To access the checklist, click the Checklist option from the left menu navigation or from the **Status Overview** page.

Figure 82: Status Overview Page



Status Overview

Success:
A CIS Request has been successfully created for you. Note the tracking number : XXXXXXXXXX

CIS00015784/Original: XXXXXXXXXX Submission Status: In Progress

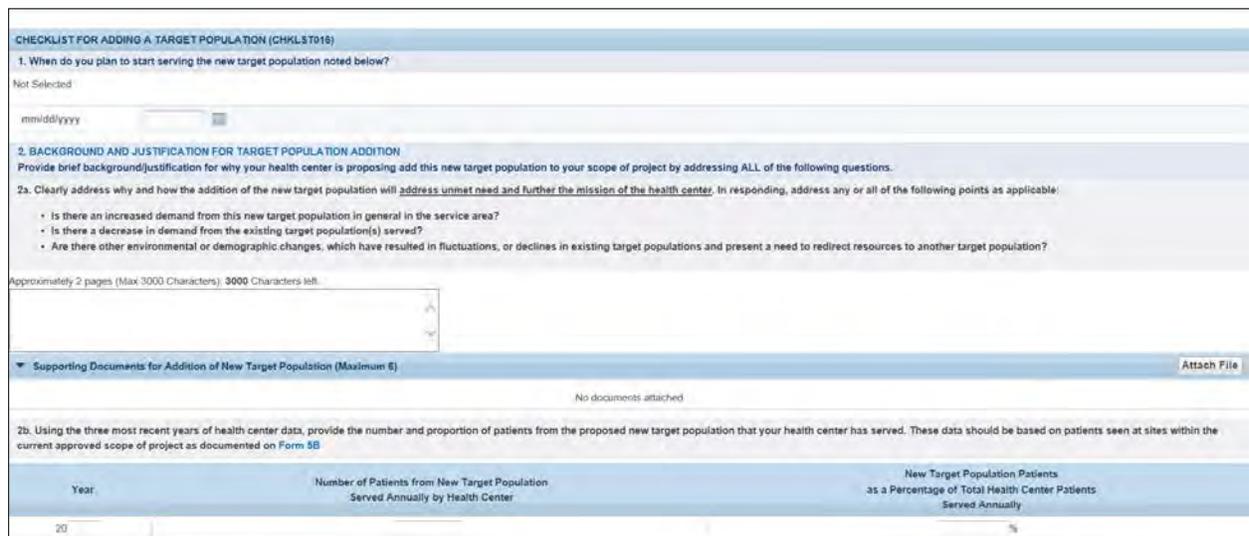
Resources

Current Document
[CIS Request](#) | [Additional Resources](#) | [User Guide](#) | [Allowable 5A Updates](#) | [Allowable 5B Updates](#) | [CIS Old and New UI Crosswalk](#)

CIS Status	Status	Options
CIS Information		
Cover Page	Not Complete	Update
Assurances	Not Complete	Update
Change Details	Not Complete	Update
Change Checklist	Not Complete	Update
Other Information		
Supporting Documents	Not Complete	Update

2. Complete the checklist, by providing the required information.

Figure 83: Checklist Page



CHECKLIST FOR ADDING A TARGET POPULATION (CHKLS016)

1. When do you plan to start serving the new target population noted below?
 Not Selected
 mm/dd/yyyy

2. BACKGROUND AND JUSTIFICATION FOR TARGET POPULATION ADDITION
 Provide brief background/justification for why your health center is proposing add this new target population to your scope of project by addressing ALL of the following questions.

2a. Clearly address why and how the addition of the new target population will address unmet need and further the mission of the health center. In responding, address any or all of the following points as applicable:

- Is there an increased demand from this new target population in general in the service area?
- Is there a decrease in demand from the existing target population(s) served?
- Are there other environmental or demographic changes, which have resulted in fluctuations, or declines in existing target populations and present a need to redirect resources to another target population?

Approximately 2 pages (Max 3000 Characters) 3000 Characters left

Supporting Documents for Addition of New Target Population (Maximum 6) [Attach File](#)
 No documents attached

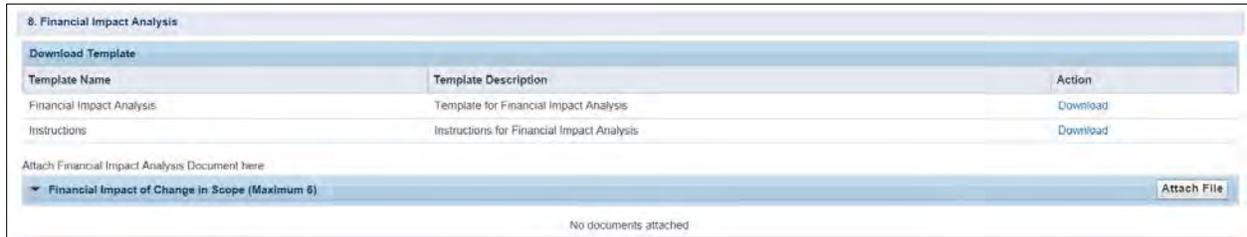
2b. Using the three most recent years of health center data, provide the number and proportion of patients from the proposed new target population that your health center has served. These data should be based on patients seen at sites within the current approved scope of project as documented on Form 5B

Year	Number of Patients from New Target Population Served Annually by Health Center	New Target Population Patients as a Percentage of Total Health Center Patients Served Annually
20		%

3. Use the templates where provided.

The financial impact questions have templates that you must download, complete, and then upload using the **Attach File** button.

Figure 84: Checklist page – Financial Impact Analysis section



Template Name	Template Description	Action
Financial Impact Analysis	Template for Financial Impact Analysis	Download
Instructions	Instructions for Financial Impact Analysis	Download

Attach Financial Impact Analysis Document here

▼ Financial Impact of Change in Scope (Maximum 5) Attach File

No documents attached

Some questions in the checklist may not be applicable for your proposed change in scope request. The system does not display the questions that are not applicable for your proposed change.

3.5. Supporting Documents

You can access the **Supporting Documents** page from left navigation or from the **Status Overview** page.

Attaching documents on **Supporting Documents** page is mandatory for the following CIS requests:

- 5B “Update PO Monitored Attributes”
- 5A “Update Required Services”
- 5A “Update Additional Services”

1. On this page, attach the required documents by clicking the **Attach File** button.

Figure 85: Supporting Documents



Supporting Documents

CIS00015600/Original: [Request to Amend Health Screen Program, Waiver 55](#) Section Status: Not Complete

▼ Resources (2)

Current Document

[CIS Request](#) | [Additional Resources](#) | [User Guide](#)

▼ Supporting Documents (Maximum 20) Attach File

No documents attached

[Go to Previous Page](#) [Save](#) [Save and Continue](#)

2. The system opens a section to browse a file. Click the **Browse** button to select a file, click **Upload** button to upload the selected file.

3. Below is the list of attachments types supported:

- .DOC - Microsoft Word
- .RTF - Rich Text Format
- .TXT - Text
- .WPD - Word Perfect Document
- .PDF - Adobe Portable Document Format
- .XLS - Microsoft Excel

4. While uploading documents, you must attach the documents in one of the formats specified above.

4. Reviewing the CIS Request

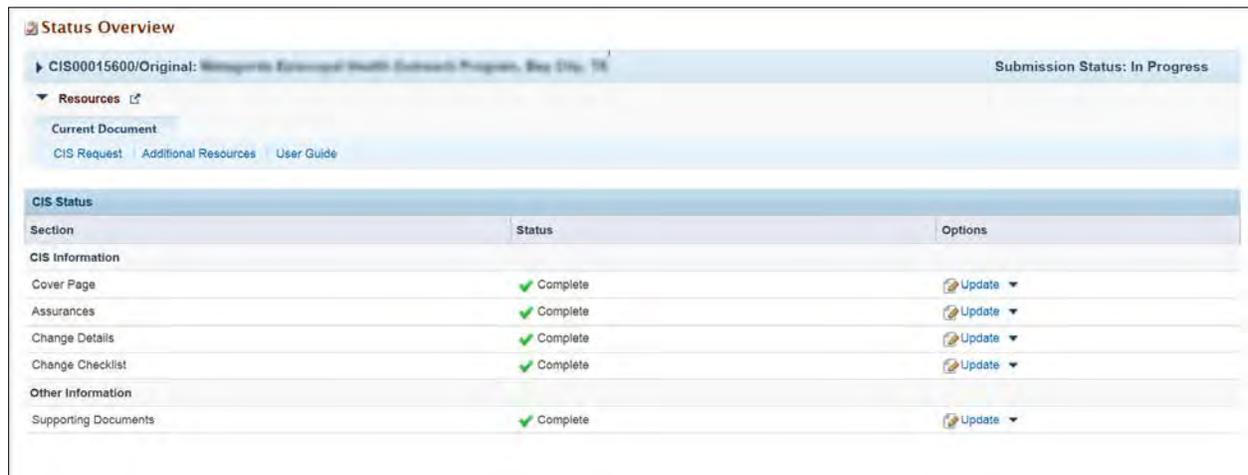
1. The **Status Overview** page shows the completion status of the checklists in the CIS request. To view this page, click [Status](#), under the **Overview** section of the left side menu, to go to the **Status Overview** page

Figure 86: Left Navigation Menu



- The system displays the **Status Overview** page.

Figure 87: Status Overview Page



2. To view or print any CIS checklist, click [Review](#) in the **Review and Submit** section of the left side menu.

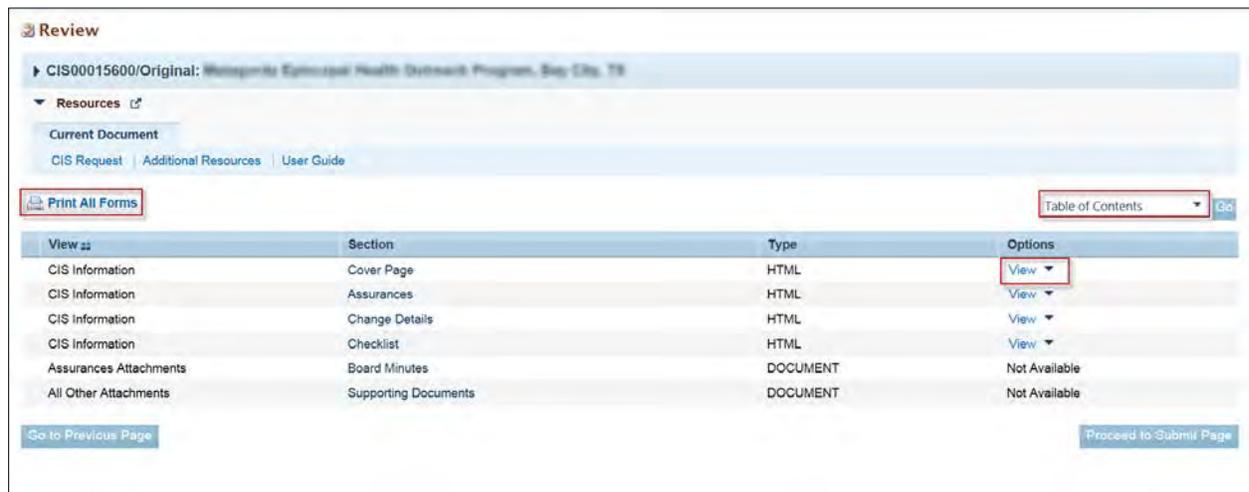
- The system opens the **Review** page for the CIS Request.

Figure 88: Left Navigation Menu



3. The **Review** page lists all the sections in the CIS request. Use the links and buttons on this page to perform the following actions:
4. Click a **View** link in the Options column to open a section.
5. Click the **Print All Forms** button to print all the forms.
6. Click a **View** link next to a document to view and print an attachment.
7. Click the **Proceed to Submit** button to go to the **Submit** page.

Figure 89: Review Page for CIS Request



5. Submitting CIS Request

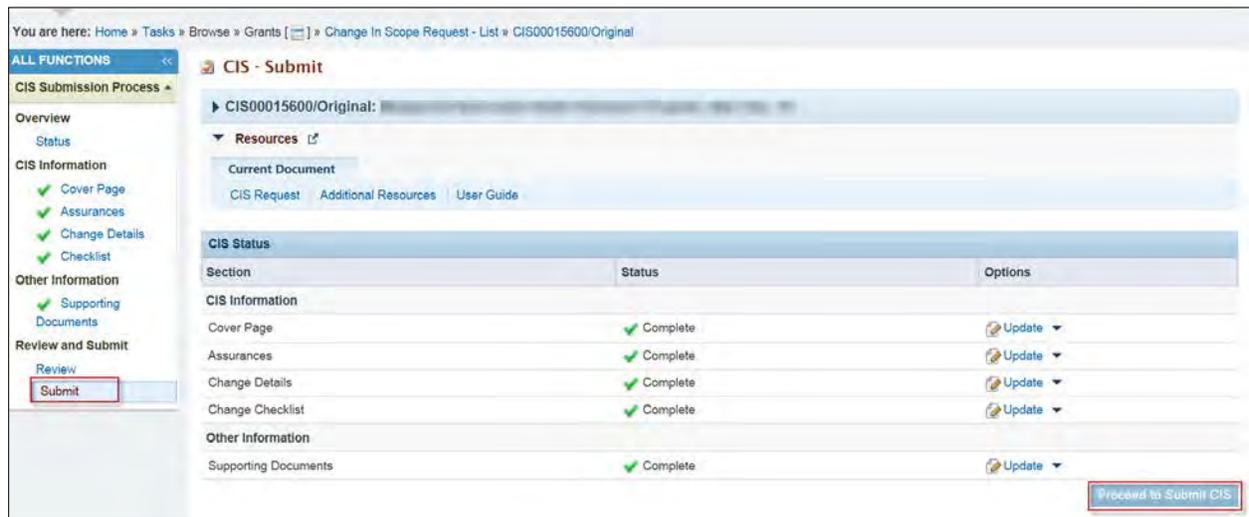
When the statuses of all the forms are Complete, you are ready to submit your CIS request to HRSA.

To submit the CIS Request, you must have the **Submit CIS Request** access rights.

To submit your CIS request:

1. Click **Submit** in the **Review and Submit** section of the left side menu to start the Submission of the CIS request.
 - The system displays the **Submit** page.

Figure 90: CIS - Submit Page



Section	Status	Options
CIS Information		
Cover Page	Complete	Update
Assurances	Complete	Update
Change Details	Complete	Update
Change Checklist	Complete	Update
Other Information		
Supporting Documents	Complete	Update

2. Click the **Proceed to Submit CIS** button.

- The system displays the **CIS Submit – Confirm** page.

Figure 91: CIS - Submit Confirmation



Fields with * are required

Acknowledgement

 I certify that the statement here in are true, COMPLETE and accurate to the best of my knowledge, and accept the obligation to comply with Public Health Service terms and conditions if a change in scope is accepted as a result of this request. I am aware that any false, fictitious, or fraudulent statements or claim may subject me to criminal, civil or administrative penalties.

- a) Check the box to electronically sign the CIS.
- b) Click the **Submit CIS Request** button to submit your CIS Request.
 - The system displays the success message on the **CIS - List** page.

5.1. Follow Up or Request Changes

Once you submit the CIS request to HRSA your project officer will review it. If your CIS request is not complete, the Project Officer (PO) can send the CIS request back to you, for changes.

You must re-submit the change requested CIS request for further review.

You can find out if your PO requested change in the CIS request you submitted:

- The system sends an email to your project director and the point of contact listed on the CIS request informing that the PO has requested a change.

OR

- By monitoring, the status of the CIS request on the **CIS list** page. This status will change to “Change Requested” if the PO has requested a change. You will also see the edit button available to edit your CIS request.

Following are the HRSA review statuses of a submitted CIS request.

HRSA Review Status	Description
Approved	The CIS request is reviewed within HRSA and approved. You will get a new Notice of Grant Award (NoA) communicating the approval. Refer to the NoA for the details of the approval and any associated conditions or remarks.
Disapproved	The CIS request has been reviewed within HRSA and disapproved. You will get an email regarding the decision.
Approval Not Required	(Monitored CIS requests only) The CIS request has been reviewed within HRSA and it has been determined that your proposed change can be accepted without formal approval. The change is accepted, but you do not get a new NoA.
Withdrawn	The CIS request is withdrawn by HRSA upon request from the grantee. You will get an email when your CIS request is successfully withdrawn.

Table 5: HRSA Review Status

5.2. Withdraw CIS Request

After submitting a CIS request, if you wish to withdraw it for any reason, you can choose to do so by submitting the withdrawal request online through the EHBs.

- You can withdraw only a submitted CIS request.
- You can submit a withdrawal request as long as HRSA has not made a decision on the CIS request.

1. To withdraw a CIS request, access the ‘Recently Completed’ tab on the **Change In Scope - List** page.
2. Open the context menu, by clicking the drop down next to CIS request, under the options column.
3. Click the **Request Withdrawal** link to withdraw the CIS request.

Figure 92: Change in Scope – List page - Request Withdrawal



4. The system displays the **Change In Scope Request Withdrawal – Edit Page**.

Figure 93: Withdraw – Edit Page



5. Provide a narrative description in the comments section and click the **Withdraw** button followed by **Confirm** button on the confirmation page to withdraw the CIS request.

5.3. Copy CIS Request

1. To Copy a CIS request, access the 'Recently Completed' tab on the **Change In Scope - List** page.
2. Open the context menu, by clicking the drop down next to CIS request, under the options column.

- You can only copy submitted CIS requests.
- You cannot copy the CIS requests created by Administrator.
- You cannot copy CIS requests that were created using old checklists.

3. Click the **Copy CIS Request** link to copy the CIS request.

Figure 94: Copy Request

Change In Scope Request - List

Note(s):
 "Copy Request" feature is available for already submitted CIS Requests only. Once a "Copy Request" is initiated, a new CIS Request will be created. All the information from the Cover Page, Assurance and Change Checklists will be copied over to the new CIS Request.

Create New CIS Requests

Not Completed Recently Completed All

Detailed View | Search | Saved Searches

2 items in 1 page(s)

Submitted	Date Submitted	Tracking #	Version	Grant #	Grantee Name	Request Type	Submission Status	HRSA Review Status	Options
Submitted: More than 90 days ago									
433 days ago	7/13/2012	CIS00010635	Original (0)		University of Maryland System	Address Correction	Submitted to HRSA	Approved	CIS Request
Submitted: Within last 30 days ago									
5 days ago	9/13/2013	CIS00015560	Original (0)		The People's Health Clinic	Add Required Service	Submitted to HRSA	Review In Progress	Action Copy Request Request Withdrawal View CIS Request Additional Resources

- The system displays the confirmation page. Click the **Confirm** button to copy the information for a new CIS request. The system navigates to the **Status Overview** page of a new CIS request.

6. Self-Update

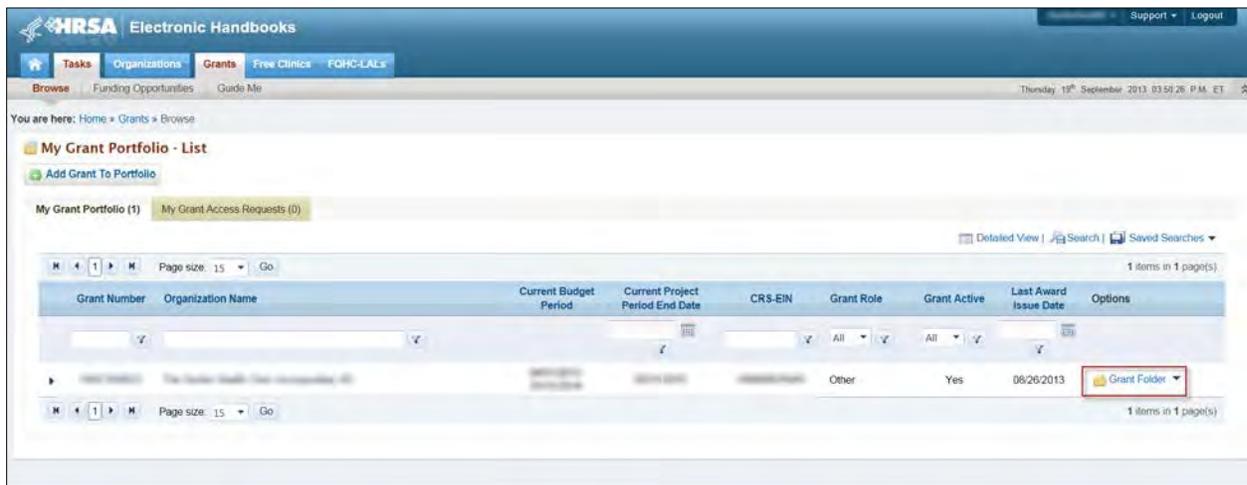
Self-update module allows you to view (and, if desired, print) the details of your approved scope. It also affords the capability to update some site-related information directly (i.e., without submitting a CIS request).

6.1. Viewing Your Approved Scope

Section 330 Grantees:

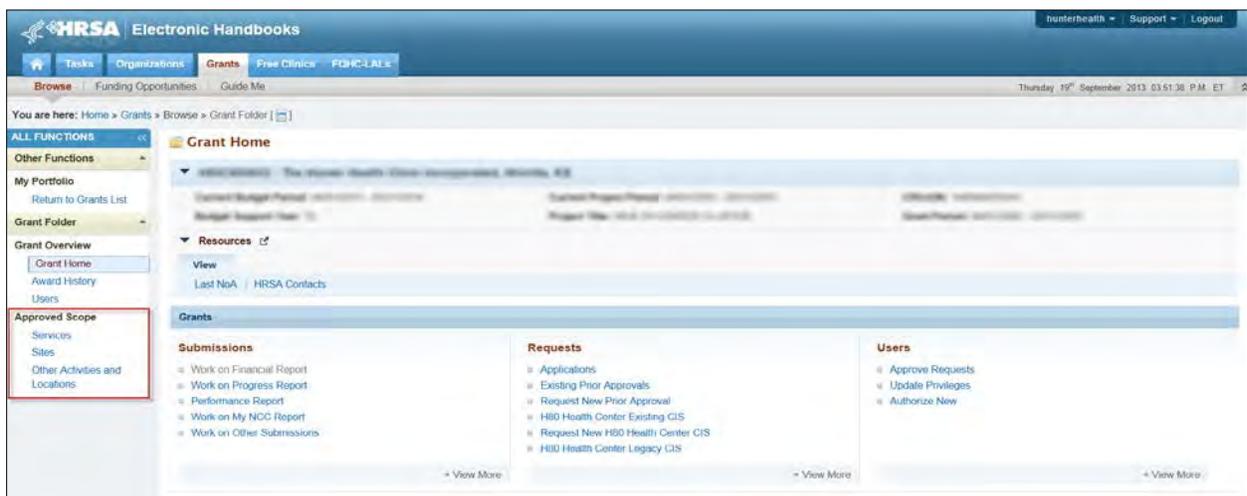
1. Login to your Electronic Handbook and navigate to the Grants tab.
2. Open the Grants folder for your Health Center Cluster (H80) grant.

Figure 95: My Grant Portfolio – List page



3. You can access the Approved Scope from the menu on the left side of the page. You can access the Services, Sites, and Other Activities and Locations in your scope.

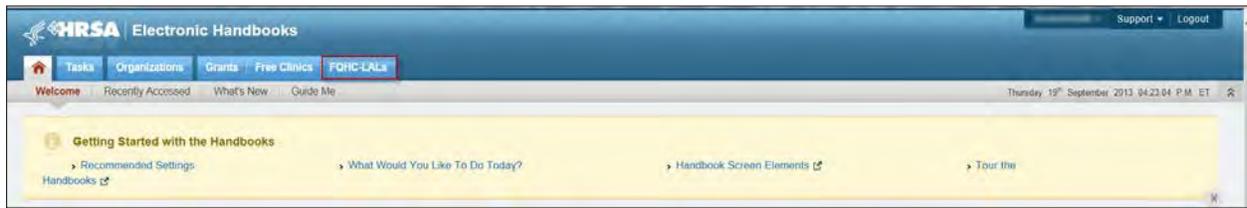
Figure 96: Grants Home - Approved Scope Section



FQHC-LAL Organizations:

4. Login to your Electronic Handbook and navigate to the FQHC-LALs tab.

Figure 97: FQHC-LAL Tab



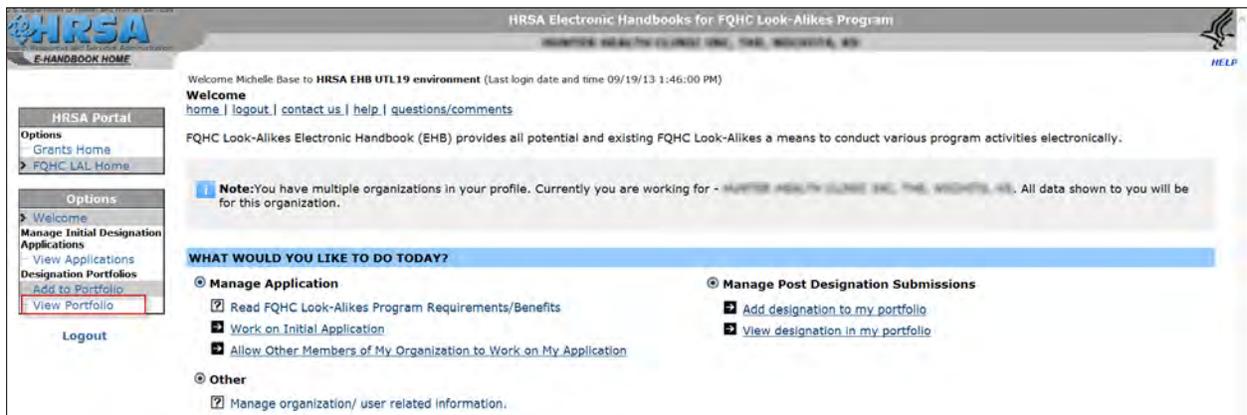
5. Navigate to the FQHC-LALs tab. Click the **FQHC-LAL Home** link.

Figure 98: My Registered Organizations – List FQHC-LAL Home



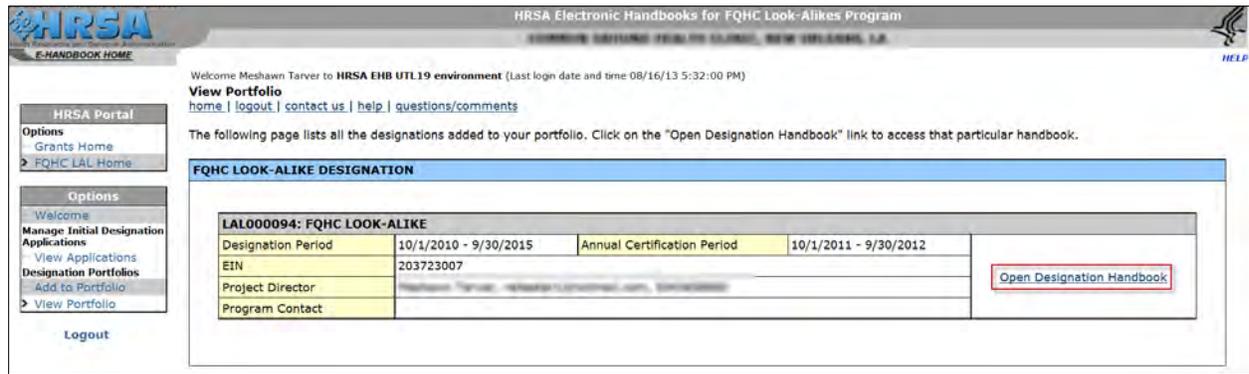
6. Click the **View Portfolio** link from the left navigation menu.

Figure 99: FQHC-LAL Home



7. Open the Designation Handbook by clicking the **Open Designation Handbook** link.

Figure 100: FQHC Look-Alike Designation



HRSA Electronic Handbooks for FQHC Look-Alikes Program
 Welcome Meshawn Tarver to HRSA EHB UTL19 environment (Last login date and time 08/16/13 5:32:00 PM)
View Portfolio
[home](#) | [logout](#) | [contact us](#) | [help](#) | [questions/comments](#)

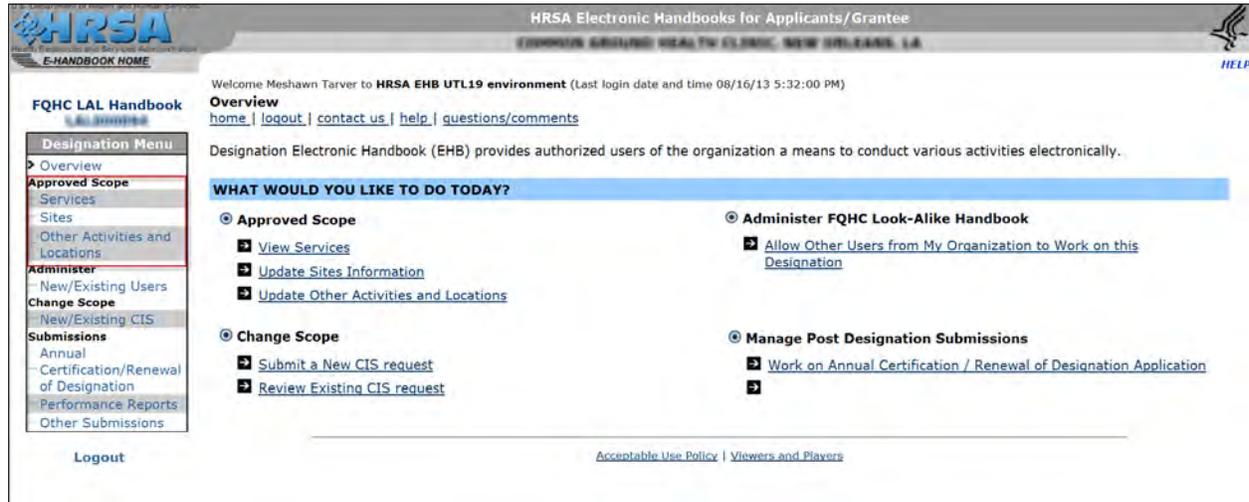
The following page lists all the designations added to your portfolio. Click on the "Open Designation Handbook" link to access that particular handbook.

FQHC LOOK-ALIKE DESIGNATION			
LAL000094: FQHC LOOK-ALIKE			
Designation Period	10/1/2010 - 9/30/2015	Annual Certification Period	10/1/2011 - 9/30/2012
EIN	203723007		
Project Director	[Redacted]		
Program Contact	[Redacted]		

[Open Designation Handbook](#)

- You can access the approved sites, services and other activities/location by accessing links on the left navigation as shown below:

Figure 101: FQHC-LAL Handbook Approved Scope



HRSA Electronic Handbooks for Applicants/Grantee
 Welcome Meshawn Tarver to HRSA EHB UTL19 environment (Last login date and time 08/16/13 5:32:00 PM)
Overview
[home](#) | [logout](#) | [contact us](#) | [help](#) | [questions/comments](#)

Designation Electronic Handbook (EHB) provides authorized users of the organization a means to conduct various activities electronically.

WHAT WOULD YOU LIKE TO DO TODAY?

- Approved Scope**
 - [View Services](#)
 - [Update Sites Information](#)
 - [Update Other Activities and Locations](#)
- Administer FQHC Look-Alike Handbook**
 - [Allow Other Users from My Organization to Work on this Designation](#)
- Change Scope**
 - [Submit a New CIS request](#)
 - [Review Existing CIS request](#)
- Manage Post Designation Submissions**
 - [Work on Annual Certification / Renewal of Designation Application](#)

[Acceptable Use Policy](#) | [Viewers and Players](#)

6.2. Updating Site Information

It is possible to update some site-related information directly without creating a CIS request. The changes are reflected in the system immediately.

1. To view site information, click the **Update** button to update site details.

Figure 102: Self Updates: Sites in Scope

The screenshot shows a web interface for managing sites. The breadcrumb trail is 'Home > Grants > Browse > Grant Folder []'. The main heading is 'Self Updates: Sites in Scope'. Below this, there are links for 'Form 5A', 'Form 5B', and 'Form 5C'. A table titled 'Sites in Scope' contains the following data:

Site ID	Site Name	Site Address (City, State, Zip, CDistrict)	Service Site Type	Site Location Type	Options
491000001	Service Delivery Site	1234 Main St, New York, NY 10001	Service Delivery Site	Permanent	Update
491000002	Service Delivery Site	5678 Elm St, New York, NY 10002	Service Delivery Site	Permanent	Update
491000003	Service Delivery Site	9101 Oak St, New York, NY 10003	Service Delivery Site	Permanent	Update
491000004	Administrative/Service Delivery Site	2345 Pine St, New York, NY 10004	Administrative/Service Delivery Site	Permanent	Update
491000005	Service Delivery Site	6789 Birch St, New York, NY 10005	Service Delivery Site	Permanent	Update
491000006	Service Delivery Site	1011 Cedar St, New York, NY 10006	Service Delivery Site	Permanent	Update
491000007	Service Delivery Site	4321 Maple St, New York, NY 10007	Service Delivery Site	Permanent	Update

2. The **Update Site** page displays the Form- 5B: Edit page with the attributes that you can update under as part of the Direct Self Update.

Figure 103: Direct Self-Update Attribute

The screenshot shows the 'Form 5B: Edit' page for updating site information. The breadcrumb trail is 'Home > Grants > Browse > Grant Folder [] > Sites'. The main heading is 'Form 5B: Edit'. A note states: 'It is recommended that you save your work often (e.g., every 5 minutes) to avoid a loss of data due to unforeseeable technical issues.' The page is divided into several sections:

- Fields with * are required for all site types:**
 - Site Name:
 - Site Type:
 - Physical Site Address:
 - Site Phone Number:
 - Web URL:
- The following fields are required for "Service Delivery" and "Administrative/Service Delivery" site types, other than where exceptions are noted:**
 - Location Type:
 - Date Site was Added to Scope:
 - Site Setting:
 - Site Operational By:
 - FQHC Site Medicare Billing Number (Required if "This site has a Medicare billing number" is selected on FQHC Site Medicare Billing Number Status field):
 - Total Hours of Operation (Other Patients will be Served per Week):
 - Number of Contract Service Delivery Locations:
 - Number of Intermittent Sites (Required only for Intermittent Site Type):
 - Site Operated by:
- Subrecipient or Contractor Information (Required only if "Subrecipient or Contractor" is selected in "Site Operated By" (- View More)):**
 - Subrecipient/contractor Organization Name:
 - Subrecipient/contractor Organization Physical Site Address:
 - Subrecipient/contractor EIN:
- Service Area Zip Code (include only those from which the majority of the patient population will come):**
 - Service Area Zip Code(s):

Buttons at the bottom include 'Go to Previous Page', 'Save', and 'Save and Continue'.

7. Support and Contact

If you have further questions, please use the following resources.

7.1. BPHC Helpline

Contact the BPHC Helpline:

- By phone: 301-443-7356 (8:30 am to 5:30 pm ET)
- By email: BPHCHelpline@hrsa.gov

7.2. HRSA Call Center

For all technical/system issues, contact the HRSA Call Center:

- By phone: 301-998-7373
- By email: CallCenter@HRSA.GOV

- Use your CIS Tracking Number for all correspondence.

- Do not call the project officer for technical questions related to HRSA EHBs.

7.3. Frequently Asked Questions (FAQs)

7.3.1. Software

1. *What are the software requirements for HRSA EHBs?*

You can access HRSA EHBs over the Internet using Internet Explorer (IE) v7.0 and above and above.

HRSA EHBs use pop-up screens to allow users to view or work on multiple screens. Ensure that your browser settings allow for pop-ups.

In addition, to view attachments such as Word and PDF, you will need appropriate viewers.

2. *What are the software requirements for submitting CIS requests?*

Refer to the software requirements for HRSA EHBs.

3. *How do I download a template?*

To download a template, click the [Download](#) link next to that template. You are navigated to a warning page with a "Continue" button. Once you click on the "Continue" button, a download dialog box will appear; from this dialog box, click on the "Save" button to save this template to your computer. Once the template is saved to your computer you can now complete it and upload it back to your CIS Request.

4. *What if when I open the template, it opens as an HTML page and I cannot edit it?*

When downloading or saving a template, you **MUST** ensure that you are saving it as an Excel document. You will see this in the "Save as Type" drop down box while saving. If you have already downloaded the template, and it is already in HTML format, then download the template again.

7.3.2. Electronic Process

1. *Why can't I see the New/Existing CIS link for some of my grants?*

CIS requests are only applicable for Health Center Cluster Program grants administered by the Bureau of Primary Health Care (BPHC). These grant numbers start with H80.

2. *How many CIS requests can I create?*

You can create as many CIS requests as necessary for your requirements. However, please discuss each CIS request within your organization and with your HRSA project officer to prevent unnecessary requests from being prepared and submitted.

3. *Is there a deadline for submitting CIS requests?*

Currently there is no deadline for submitting CIS requests.

4. *How can I update Suite Number for Service Delivery Site?*

Address changes are only allowed via the Administrator. You can submit a Formal CIS request to replace the site.

5. Can you list the emails generated from the HRSA EHBs regarding the CIS process? Who receives the emails?

Section 330 CIS Notifications

Notification	Subject	Purpose	Sent by	Recipient
Submission of CIS Request	CIS Request Submitted (Tracking No: <trackingnumber>)	The purpose of this email is to notify the health center that the CIS request was successfully submitted.	System User	Authorizing Official (AO), Point of Contact (POC), Application Preparer
Change Request by Project Officer	Update CIS Request (Tracking No: <trackingnumber>)	The purpose of this email is to notify the health center that the project officer has requested additional information.	Project Officer	AO, POC, Application Preparer
CIS Withdrawn	CIS Request Withdrawn (Tracking No: <trackingnumber>)	The purpose of this email is to notify the health center that the CIS request has been successfully withdrawn.	Project Officer	AO, POC, Application Preparer
CIS Deleted	CIS Request Deleted (Tracking No:<trackingnumber>)	The purpose of this email is to notify the health center that the CIS request was deleted successfully.	System User	AO, POC, Application Preparer
CIS Approved	Transmission of a HRSA Notice of Award for <AwardNumber>	The purpose of this email is to transmit the NoA to the grantee	Grants Management Specialist	Project Director and other users such as AO and Business Official
CIS Disapproved	Disapproval Notification for Change in Scope Request (Tracking No:<tracking number>)	The purpose of this email is to notify the grantee of the disapproval along with justification	Grants Management Officer	AO, POC, Application Preparer

Table 6: List of CIS Related Notifications (Section 330)

FQHC-LAL CIS Notifications

Notification	Subject	Purpose	Sent by	Recipient
LAL User submitted/Resubmission	LAL CIS Request Submitted (Tracking No: <tracking number>)	The purpose of this email is to notify the health center that the CIS request was successfully submitted.	System User	To stakeholder of interest, To PD of the Designation, To PO of the Designation
LAL PO requests change from Look-Alike org	Change requested for LAL CIS Request (Tracking No: <tracking number>)	The purpose of this email is to notify the health center that the LAL PO has requested additional information.	LAL PO	To stakeholder of interest, To PD of the Designation
Final Approval notice to Look-Alike user for approved LACIS	LAL CIS Request Approved (Tracking No: <tracking number>)	The purpose of this email is to notify the Health Center of the approval.	LAL PO	To stakeholder of interest, To PD of the Designation
Disapproval Notice to Look-Alike by PAO	LAL CIS Request Disapproved (Tracking No: <tracking number>)	The purpose of this email is to notify the Health Center of the disapproval along with justification.	LAL PO	To stakeholder of interest, To PD of the Designation

Table 7: List of CIS Related Notifications (FQHC-LAL)

6. How can I move services from column 1 to column 2 & 3 on Form 5A?

These updates to the Services can be done via Monitored updates. You can use the 'Update required services' and 'Update additional services' Monitored update options from the CIS Request Type page. For similar request types, refer to the 'Allowable 5A Updates' and 'Allowable 5B Updates' document in the Resources section

7. Do I have to create individual CIS requests if I need to delete 9 services from Scope?

Deleting a service requires a Formal CIS request; and only 1 Formal CIS request can be requested for each change. Hence, you will be required to create 9 separate CIS 'Delete an Existing Service from Scope' requests. Note: For Monitored requests, you can request more than one change.

8. When does the 120 day deliverable notification get created?

Only for Formal CIS requests, the 120 day deliverable notification is created after the NoA has been released.