BCRS Management Information System Solution (BMISS)

*Native Hawaiian Health Scholarship Program
Applicant Information Screen User Guide*

June 2012

U.S. Department of Health and Human Services

HRSA

Health Resources and Services Administration

Table of Contents

Introduction: NHHSP Applicant Information Screen User Guide

Goal: The goal of the NHHSP Applicant Information Screen User Guide is to provide guidance on entering NHHSP applicant information into BMISS.

Roles: NHHSP Analysts.

Preconditions:
- Applicant has applied to the NHHSP.
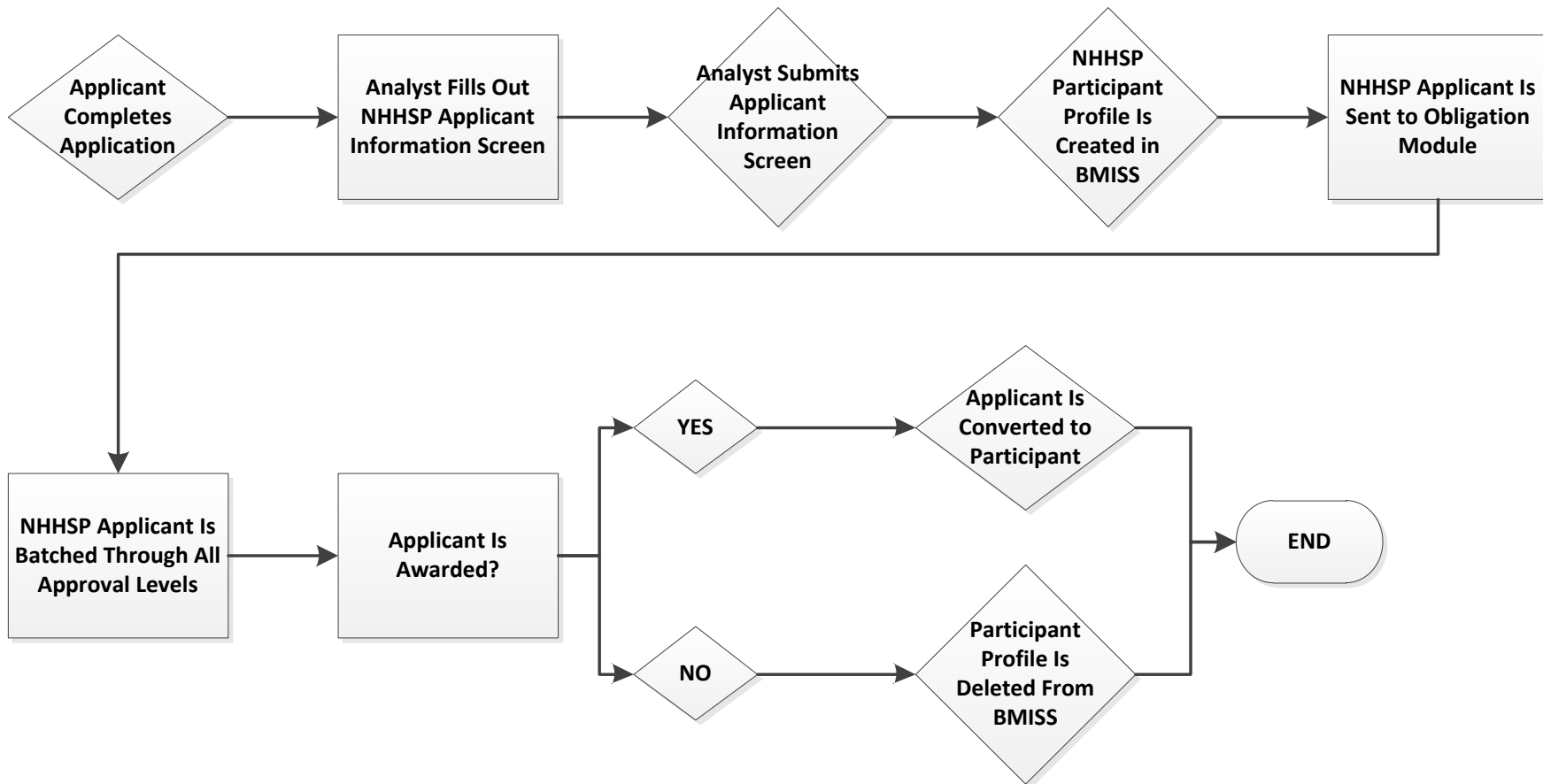- Applicant is deemed eligible.

Postconditions:
- Applicant information has been saved in BMISS.
- Applicant is converted to Participant.

Section 1: NHHSP Applicant to Participant Process Flow

The process flow for NHHSP applicants is below.

```
Applicant          →    Analyst Fills Out   →   Analyst Submits   →    NHHSP           →   NHHSP Applicant Is
Completes               NHHSP Applicant         Applicant             Participant          Sent to Obligation
Application             Information Screen      Information           Profile Is           Module
                                                Screen                Created in
                                                                      BMISS
                                                                                                    │
                                                                                                    ↓
NHHSP Applicant Is  →   Applicant Is   →   YES   →   Applicant Is        →   END
Batched Through All     Awarded?                     Converted to
Approval Levels                                       Participant

                                          NO    →   Participant
                                                     Profile Is
                                                     Deleted From
                                                     BMISS
```

NOTE: If the NHHSP Applicant is not awarded during obligation, in order for their participant profile to be deleted, the analyst will need to notify the BMISS Team.

Section 2: Navigate to NHHSP Screen

After an NHHSP applicant has submitted all application materials and has been deemed eligible for the NHHSP award, the NHHSP analyst will navigate to the Applicant Information Screen.

Steps:

1. User navigates to BMISS via the link: https://bmiss.hrsa.gov/intranet/index.seam

2. User scrolls over the **Programs** tab and scrolls down to **NHHSP**.

3. User selects **New Award**.

4. System directs user to the NHHSP Applicant Information Screen.

Business Rules:

- User must have the NHHSP Reviewer role to navigate to the NHHSP Applicant Information Screen.

Section 3: Upload Required Supporting Documents

Once the analyst has navigated to the NHHSP Applicant Information Screen, the first section at the top of the page will request that the analyst upload the required supporting documents.

New NHHSP Awards

▼ **Supporting Documents**

There are no uploaded documents

Please note: The following file types are suitable for upload: pdf

Participant Award Worksheet

Browse... Upload

Contract

Browse... Upload

Award Letter

Browse... Upload

W-4 Form

Browse... Upload

Steps:

1. User selects **Browse** under the document they wish to upload.

2. User selects the appropriate document.

3. User selects `Upload`

4. System displays the date, time, document, and document type at the top of the page (see screenshot on the next page).

5. User repeats these steps for all four documents.

6. *User scrolls down to the next section: Personal Information.*

Business Rules:

- System shall only accept document in .pdf format.

- System shall require all four documents to be uploaded in order for user to submit:

    • **Participant Award Worksheet**
    • **Contract**
    • **Award Letter**
    • **W-4 Form**

- System shall allow user to view the uploaded documents by clicking on the document name.

New NHHSP Awards

✓ Document successfully uploaded.

▼ Supporting Documents

Document

- 6/12/12 11:33:27 AM: Participant Award Worksheet.pdf (Participant Award Worksheet)

- 6/12/12 11:33:45 AM: Contract.pdf (Contract)

- 6/12/12 11:33:57 AM: Award Letter.pdf (Award Letter)

- 6/12/12 11:34:15 AM: W_4.pdf (W-4 Form)

Please note: The following file types are suitable for upload: pdf

Participant Award Worksheet

Browse... [Upload]

Contract

Browse... [Upload]

Award Letter

Browse... [Upload]

W-4 Form

Browse... [Upload]

- System shall open the documents in a new window.

Section 4: Applicant Personal Information

After uploading the required supporting documents, the analyst will enter in the applicant's personal information. This is divided into four sections of **Full Name, Home Address, Phone and Email**, and **School Information**. This information is needed for creating the participant profile in BMISS.

Steps:

1. User enters all required fields.

2. User scrolls down to the next section: *Financial Information.*

Business Rules:

-   System shall require user to enter all required fields (fields with an *).

-   The **Funding Start Date** and **Funding End Date** range should include all years that the applicant will be funded.

▼ Personal Information

Full Name

First Name *	
Last Name *	
Middle Initial	
Title	Select ▼
Suffix	Select ▼
SSN *	

Home Address

Street Address 1 *	
Street Address 2	
Country	United States ▼
City *	
State *	Select ▼
Zip Code *	

Phone and Email

☐ Non-US Number

Daytime *		Ext.	
Home *			
Mobile			

Email

Home	
Work	

School Information

Year In School *	Select ▼
Graduation Date *	📅
Funding Start Date *	📅
Funding End Date *	📅

Section 5: Applicant Financial Information

After the analyst enters in the applicant's personal information, they will need to enter the applicant's financial information.

▼ Financial Information

Banking Information

Bank Name *

Account Type *

Routing Number *

Account Number *

W-4 Information

Allowance Quantity *

Withholding Amount * $0.00

☐ Tax Exempt

Marriage Status   Single Person

Steps:

1. User enters all required fields.

2. User scrolls down to the next section: *Award Information*.

Business Rules:

-     System shall require user to enter all required fields (fields with an *).

Section 6: Award Information

After the analyst enters in the applicant's financial information, they will need to enter the applicant's award information.

▼ Award Information

Fiscal Year and Funding Type *   Select ▼

2012 BASE Budget Available Balance: $837,381.00 ←

Award Breakdown

Tuition *   [   ]

Stipend *   [   ]

ORCs *   [   ]

Steps:

1. User enters all required fields.

Business Rules:

- System shall require user to enter all required fields (fields with an *).

- System shall show the available budget once user selects **Fiscal Year and Funding Type**.

Section 7: Submitting Applicant Information

When the analyst is ready to submit the NHHSP Applicant Information Screen, they will be required to enter in comments, select submit, and confirm.

▼ Comments

Submitting

New Comments *

Submit   Clear Information

▼ Comments

Confirming (after submitting)

New Comments *

comments.

Confirm Award   Back

Steps:

1. User enters in comments.

2. User selects Submit

3. System will ask user to confirm the information entered on the page.

    Please verify the information below and press confirm

4. User reviews the information and selects Confirm Award

5. User is directed to the participant's profile page in BMISS.

Business Rules:

- User must enter comments to Submit.

- Before selecting **Submit,** user can select Clear Information to clear all the information entered on the page and start over.

- After user selects **Submit**, system shall ask user to **Confirm Award**.

- When confirming, system shall display all information as "Read Only."

- When confirming after selecting **Submit**, user can select Back to go back and edit any information. User will need to then **Submit** again.

- User must select **Confirm Award** in order for the applicant information to be saved in BMISS.

Section 8: Creation of Participant Profile

Once all NHHSP Applicant information has been submitted and confirmed, a participant profile will automatically be created for the person based on the information that was entered. The user will be automatically taken to the person's participant profile page upon submission of the applicant information. The applicant will not have been awarded and converted to participant at this point, although their participant profile will have been created. The applicant will be ready for batching after submission of applicant information, and if for any reason they are not awarded during the batching process, their participant profile account will be deleted from BMISS.

Steps:

1. System directs user to the person's participant profile page.

2. System sends applicant to obligation module.

Business Rules:

- Basic participant information will be captured at the top of the page (See Screenshot 1)

- System will pre-populate the person's information on their participant profile page based on the information that was entered on the NHHSP Applicant Information Screen.

  - **Personal Information** (See Screenshot 2)
  - **Education Information** (See Screenshot 3 on page 13)
  - **Financial Information** (See Screenshot 4 on page 13)

- All fields are editable.

- System will notify user that the person is ready for batching.

NOTES:
- Only the **Graduation Date, Funding Start Date,** and **Funding End Date** will be shown on the education tab. The user will need to update the school information after the applicant is converted to a participant. This can be done on their participant profile page.

- Financial information will show the **Participant Award Worksheet, Contract,** and **Award Letter** on the Award documents tab under *Financial Information.*

- The participant's payment schedule will automatically be created.

- Participant Profile will be removed from BMISS if applicant is not awarded during batching.

NOTE: If the NHHSP Applicant is not awarded during obligation, in order for their participant profile to be deleted, the analyst will need to notify the BMISS Team.

Section 9: Resolving Issues

Please follow the instructions to resolve any problems a NHHSP Analyst might have:

1. For Technical Issues:

- When a **technical** issue is encountered, e.g. Analyst cannot upload the supporting documents, the issue should be logged in TTPro with a detailed description of the problem. At this point, the BMISS HyperCare Support Team would define and resolve the issue as well as notify the analyst of the resolution.

Logging Issues:
- When logging issues into TTPro:
  - Log issues as "Production Support" under *Version.*
  - Attach a screenshot to the issue (if applicable)
  - Include the following details in the *Summary* section:
    - The page that the issue was found on = *NHHSP Applicant Information Screen*
    - Applicant information: Full name, last four of SSN, email, phone number
    - The Web Browser the analyst was using
    - The frequency of the issue