

High Road Training Partnerships

HRTP: Healthcare
Orientation Webinar

HIGH ROAD



Webinar Recording

- This presentation is pre-recorded for your convenience and will be available on the HRTP Grantee Portal throughout the grant term.
- Additional instructions and information for this training can be found in the HRTP: Healthcare Grant Administration Guide on the HRTP Grantee Portal.
- Please send any questions or assistance requests to the HRTP inbox at HRTP@cwdb.ca.gov with the subject line “HRTP: Healthcare – Grantee Name – Topic.”

Presentation Overview

- Role of the California Workforce Development Board
- Role of the Fiscal Agent/Awardee
- Cal-E-Grants
- Project Progress and Modifications
- Project Reporting
- Monthly Fiscal Expenditure Reporting
- Tools & Resources
- Proof of Participation



Role of the California Workforce Development Board

Program Implementation and Regional Support Branch (PIRS)

PIRS manages grant administration and project management and will be the main point of contact throughout the grant term.

Each project is assigned a Program Analyst who can be contacted through the initiative inbox.

PIRS uses a dedicated inbox per initiative for grant administration and project management communications. Inquiries will be responded to within 48 hours, Mon – Fri.

H RTP@cwdb.ca.gov

Policy, Research & Legislation Branch (PRL)

The Policy, Research, and Legislation Branch (PRL) provides:

- Project and program evaluation
- Participant data reporting requirements and procedures support including technical assistance related to data collection systems (CaJOBS, Cal-E-Grants)
- Assistance with participant eligibility and placement inquiries

The PRL inbox is designed to receive and respond to any questions or technical assistance relating to participant data collection and reporting. Inquiries will be responded to within 24 hours, Mon – Fri.

ResearchUnit@cwdb.ca.gov

A grayscale photograph of four healthcare professionals (two men and two women) standing in a hospital hallway. They are all wearing scrubs and have their arms crossed, smiling at the camera. The background shows a typical hospital corridor with doors and windows.

Role of the Fiscal Agent/Awardee

Expectations and requirements of the Fiscal Agent as the CWDB's first point of contact for grant administration.

Fiscal Agent/Awardee Requirements and Responsibilities

The Fiscal Agent must be:

- Attentive and responsive to all communication with the CWDB.
- Responsible for communicating delays or obstacles impeding the progression/success of the project to the CWDB.
- Proactive in updating Specific Points of Contact (SPOC) form.
- Adherent and compliant with all requirements outlined in the HRTP: Healthcare Grant Administration Guide and Participant Data Guidance and in accordance with the proposal/award.

Fiscal Agent/Awardee Requirements and Responsibilities (Continued)

- Responsible for completing all progress reports by the deadline.
 - ***Reports must provide comprehensive and detailed responses.***
- Accountable for real time case management services and meeting data reporting requirements, if serving participants.
- Timely submission of invoice every month.
 - Including internal record retention of expenses for monitoring/auditing purposes.
- Responsible for project deliverables to be completed by the end of the grant term.

Single Points of Contact (SPOC)

- All Fiscal Agents/Awardees must designate staff as Specific Points of Contact (SPOC). SPOCs will keep the CWDB updated on specific parts of the project.
- The purpose of the SPOC form is to ensure CWDB reaches out to the appropriate points of contact.
- There are multiple contact **lists** that are used for various elements of grant-related events and communication.



Cal-E-Grants

Cal-E-Grants (CEG) Overview

- The CEG system is for project management purposes, including:
 - Monthly invoicing
 - Modification requests
 - Semi-Annual Progress Reports
 - Participant data collection
 - Accessing project exhibits
- All staff directly reporting on program outcomes and fiscal outcomes are required to have CEG accounts.

Creating Cal-E-Grants Staff Accounts

- All grantee staff accounts should be created under the existing Cal-E-Grants Administrator account for the project.
- Individual accounts not linked to the Administrator account should be avoided.
 - If staff accidentally creates an account not linked to the Administrator account, contact CWDB staff immediately.
- Detailed instructions on how to create Cal-E-Grants staff accounts are in the Grant Administration Guide located on the H RTP Grantee Portal.

A grayscale photograph of a worker wearing a hard hat, focused on adjusting a control panel in an industrial setting. The worker is in the foreground, and the background shows various pieces of machinery and equipment, all rendered in a light, desaturated tone. The overall atmosphere is professional and industrious.

Project Progress and Modifications

Communicating Project Progress and Changes

- Project Modification Requests must be submitted through the Cal-E-Grants system.
- CWDB staff will review the request and provide guidance on the next steps for applicable exhibit revisions in Cal-E-Grants.
- Refer to the HRTP: Healthcare Grant Administration Guide for step-by-step process of project modifications.

Project Modifications

Reasons for Modifications

- **Budget** – Changes to budget require a modification to authorize the use of funds. This includes re-allocation of funds, adding contractors that were previously TBD, adding new contractors, etc.
- **Partners** – Adding, modifying, and/or removing partners.
- **Other** – Anything that doesn't fall into the above categories will be determined by the grantee based on the request.

Modification Cutoff Deadline

- All modification requests must be submitted 60 days prior the project's grant term end date.



Project Reporting

Quarterly Check-Ins

- Virtual check-in meetings between Fiscal Agent and CWDB Program Team every quarter.
- Opportunity for Fiscal Agents to have programmatic questions and/or concerns addressed and obtain timely technical assistance.
- Allow CWDB to learn more about the project's activities and progress, including successes, challenges, and needs.
- Will occur quarterly for the first year of the grant term.
- The CWDB encourages the attendance of required partners and key program staff to the extent feasible.

Progress Reports

Progress Reports Purpose

- Report out on project progression, activities, successes, and challenges, including communicating any adjustments or course corrections.
- Share best practices and lessons learned.
- Development and expansion (partnerships, industry, region, etc.).
- Elevate broad workforce barriers and obstacles to the State.
- Identify areas needing CWDB project assistance and support.
- Share qualitative data and outcomes.

Progress Reports (Continued)

Progress Reports Expectations

- Completed on a semi-annual basis covering activities that occurred within the reporting period.
- Progress reports with insufficient responses/details may be returned to the Fiscal Agent with requested adjustments.
- Failure to provide correct or responsive answers may impact the performance and evaluation of the Fiscal Agent/Awardee and the project.

Progress Reports (Continued)

Reporting Schedule

January 1st – June 30th: Report due July 20th

July 1st – December 31st: Report due January 20th

- Email notification will be sent to grantees when reports are available in the Cal-E-Grants System.
- Reports must be completed and submitted electronically.
- Instructions on how to access and submit Progress Reports can be found in the H RTP: Healthcare Grant Administration Guide.

Close-Out Report

- Covers project activities and outcomes for the full grant term.
- Due 30 days after project's grant term end date.
- Email notification will be sent to grantees when reports are available in the Cal-E-Grants System.
- Instructions on how to submit Progress Reports can be found in the HRTP: Healthcare Grant Administration Guide.



Monthly Fiscal Expenditure Reporting

Fiscal (Invoice) Report Submission Instructions

- The Fiscal Agent must submit monthly invoices for reimbursement through the Cal-E-Grants system.
- Monthly invoices must be submitted even if no expenditures are incurred for that month.
 - Example: Fiscal Agents would submit a \$0.00 invoice for that month.
- Invoices are due by the 20th of the month following the invoice period.
 - Example: The July monthly invoice would be due by August 20th
- Detailed monthly invoice instructions can be found in the HRTP: Healthcare Grant Administration Guide located on the Grantee Portal.

Fiscal (Invoice) Payment

- Once CWDB staff approve the invoice submission in the Cal-E-Grants system, additional processing is required by the Employment Development Department (EDD).
- Fiscal Agents will receive an email notification when the invoice has been submitted to EDD for check processing.
- Reimbursement payments are issued within 45 calendar days of the invoice being received, approved, and processed by the EDD.
 - If payment is not received after 45 days, contact the HRTP inbox.
- Payment warrants are mailed to the address listed on the STD204 and/or STD205.

Fiscal Monitoring and Documentation

- The CWDB does not ask for proof of payment with the invoices (i.e., purchase receipts). However, Fiscal Agents must keep track of these records for monitoring and auditing purposes.
- If leveraged funds were included in the application, it will be required to track and report this in the monthly invoicing.
 - The Fiscal Agent is required to track leverage/match funds separately from grant funds.
 - In the event of monitoring, the Fiscal Agent must provide supporting documentation to show how all leveraged funds were spent within the grant term.



Tools & Resources

H RTP Grantee Portal

The Grantee Portal includes:

- Grant-related forms, documents, and updates for ongoing grant management
- Grant Administration Guide
- General grant support and resources

Link: <https://cwdb.ca.gov/hrtp-grantee-portal/>

Password: HighRoad

Grant Administration Guide

- Unique and customized to the HRTP: Healthcare grant program.
- Includes detailed processes, programmatic guidance, requirements, and more related to HRTP: Healthcare.
- All Fiscal Agent staff should thoroughly review the full Grant Admin Guide.
- Available on the HRTP Grantee Portal.



Proof of Participation

After viewing this orientation, please email a signed self-attestation form to the Program Branch at H RTP@cwdb.ca.gov affirming you have viewed this orientation video.

Q&A

Please email questions to the HRTP Inbox:
HRTP@cwdb.ca.gov