HRTP: Healthcare Orientation Webinar Transcript

Slide 1 – Title Page

Welcome to the High Road Training Partnerships: Healthcare (HRTP: Healthcare) orientation webinar presented by the California Workforce Development Board (CWDB).

Slide 2 – Webinar Recording

This presentation is pre-recorded for the grantees' 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 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."

Slide 3 – Presentation Overview

This onboarding training is designed to provide a general overview of the HRTP: Healthcare grant expectations. After this training, all grantees should thoroughly review the HRTP Grant Administration Guide, a more comprehensive resource for Fiscal Agents/Awardees that highlights key grant expectations and requirements.

This orientation will cover the following topics: the role of the California Workforce Development Board, the role of the Fiscal Agent/Awardee, Cal-E-Grants, Project Progress and Modifications, Project Reporting, Monthly Fiscal Expenditure Reporting, Tools and Resources, and directions for submitting a self-attestation form verifying agency staff viewed this onboarding webinar.

Slide 4 – Role of the California Workforce Development Board *[Divider]*

Role of the California Workforce Development Board

The following section will provide an overview of the CWDB Branches, CWDB's role in managing the HRTP: Healthcare grant, and the contacts available to Fiscal Agents via the initiative inbox.

Slide 5 – Program Implementation and Regional Support Branch (Program Branch)

The role of the Program Branch is to provide Fiscal Agents with the support, resources, and technical assistance needed to execute project deliverables successfully throughout the grant term. Services include, but are not limited to, the following:

- Provide general project management and technical assistance.
- Oversee grant administration of the standard agreement.

- Facilitate progress reporting and project barrier resolution(s).
- Process invoices, confirm allowable use of funds, and respond to general budget inquiries.
- Assist with modification requests and exhibit revisions.

Slide 6 – Policy, Research, and Legislation (PRL) Branch

The Policy, Research, and Legislation Branch (PRL) is responsible for answering all questions related to participant data reporting requirements and procedures. Areas of assistance include, but are not limited to:

- Grant Program Data Guide
- Participant reporting requirements
- Data system technical assistance (note this grant will use Cal-E-Grants, not CalJOBS).
- Placement assistance

Grantees will have access to a separate training session on participant data collection requirements led by the PRL Branch, which will be posted on the Participant Data Guidance page.

Please direct all data-related questions to the Research Unit inbox.

Slide 7 – Role of the Fiscal Agent/Awardee [Divider]

Role of the Fiscal Agent/Awardee

The following section will provide an overview of the general requirements and responsibilities of the Fiscal Agent. The term "Fiscal Agent" refers to the awarded agency that enters into a contractual agreement with the State of California.

Slide 8 – Fiscal Agent/Awardee Requirements and Responsibilities

The Fiscal Agent must be attentive and responsive to all communication with the CWDB. This includes being proactive in communicating project challenges as they arise, meeting all reporting and invoicing deadlines, and providing timely responses to CWDB staff when requested. Additionally, it is important to update the CWDB on internal staff changes that impact grant communication by updating the Specific Points of Contact Form as needed throughout the grant term.

Projects must be managed in accordance with the original proposal and award. For this reason, the Fiscal Agent is responsible for notifying the CWDB of project adjustments, pivots, or delays to ensure that procurement requirements are still being met.

The Fiscal Agent is responsible for adherence and compliance with all requirements outlined in the HRTP: Healthcare Grant Administration Guide and Participant Data

Guidance page. This includes reviewing and understanding all requirements outlined in the guides located on the HRTP Grantee Portal.

Slide 9 – Fiscal Agent/Awardee Requirements and Responsibilities (Continued)

In addition to proactive communication regarding challenges and changes in points of contact, Fiscal Agents are also responsible for meeting all internal deadlines set by the CWDB, including but not limited to semi-annual reporting, monthly invoicing, and ad hoc information requests.

For projects serving participants, Fiscal Agents are responsible for applicable data reporting requirements as outlined in the HRTP: Healthcare RFA. Additional resources related to participant data reporting can be found on the Participant Data Guidance page on the CWDB website.

Regardless of whether participants are served, all projects are responsible for reporting project deliverables outlined in contract exhibits to the CWDB.

Slide 10 – Single Points of Contact (SPOC)

All Fiscal Agents/Awardees must designate certain staff as Single Points of Contact (SPOC), who will keep the CWDB updated on parts of the project. A SPOC form identifies individuals within the project who are responsible for the following:

- *Project Lead* – Main point of contact for the CWDB on grant administration, project status, and activities, and information requests. Responsible for responding on behalf of the grant to the CWDB. This contact will be included on all emails regarding the grant. Must list a primary and a secondary.
- *Fiscal* – The CWDB's Main point of contact for fiscal questions (e.g., invoices) on behalf of the grant. Up to two contacts are allowed.
- *Participant Data Reporting* – The main point of contact for the CWDB to engage with regarding participant data reporting questions and follow-up, including information requests outside of the data capture system. Up to two contacts are allowed.
- *Networking & Communities of Practice* – Project team members who will share information about webinars, communities of practice, peer learning events, and networking opportunities. Project team members can include partners.

This form should always be up to date. The Fiscal Agent is responsible for notifying the CWDB when staff and points of contact change.

Slide 11 – Cal-E-Grants *[Divider]*

Cal-E-Grants

This section will provide a brief overview of the Cal-E-Grants online system, which is used for project management.

Slide 12 – Cal-E-Grants Overview

Cal-E-Grants, the same system used to submit applications, will continue to manage various project administration components for the duration of the grant term. Monthly invoicing, modification requests, semi-annual progress reports, and participant data collection will all be done on Cal-E-Grants. Cal-E-Grants is also used to access crucial exhibits needed for project management, such as the Participant Plan or Workplan.

For this reason, all staff tasked with program and fiscal reporting must have access to Cal-E-Grants accounts upon the start of the grant period.

Slide 13 – Creating Cal-E-Grants Staff Accounts

The Cal-E-Grants Administrator is the individual who submitted the application for the organization. This administrator has the capability to create accounts for all pertinent staff. To streamline the required reporting, all accounts should be created under the Administrator account. Individual accounts that are not linked to the Administrator account should be avoided. If staff accidentally creates an account that is not linked to the Administrator account, notify CWDB staff immediately.

All support staff who will be submitting monthly invoices, completing progress reports, and/or initiating modification requests will need to create staff accounts under the Administrator's account.

Detailed instructions for creating linked administrator and staff accounts are in the HRTP: Healthcare Grant Administration guide on the HRTP portal. The CWDB Program Branch is available to support and troubleshoot any Cal-E-Grants log-in issues.

Slide 14 – Project Progress and Modifications *[Divider]*

Project Progress and Modifications

This section will briefly review the steps necessary for initiating a modification request.

Slide 15 – Communicating Project Progress and Changes

All modifications will be done digitally via Cal-E-Grants. The Fiscal Agent will submit a Modification Request through the Cal-E-Grants system for the CWDB Program Branch to review. When the CWDB approves a modification request, a notification will be sent to the Fiscal Agent requesting edits to applicable exhibits within Cal-E-Grants. The CWDB will provide specific instructions and guidance on exhibit changes based on the modification request.

Modification approval is usually granted within a week of grantees submitting correct revised exhibits. However, if the modification request is for adding funding or an extension to a grant, approval may take up to 4 – 6 months. Modification requests are not approved until the Fiscal Agent has received correspondence from the CWDB confirming final approval, and the changes are reflected in Cal-E-Grants.

For additional guidance regarding project modification requests, please review the HRTP: Healthcare Grant Administration Guide, which provides step-by-step instructions.

For questions about a potential modification, reach out to the Program Branch via the HRTP@cwdb.ca.gov before submitting the request in Cal-E-Grants for consultation and support.

Slide 16 – Project Modifications

The CWDB recognizes that projects can evolve throughout the grant term, and projected activities may not always progress exactly as outlined in the original grant agreement. Reasons for modifications vary, but can include changes to the budget, formal partners, contractors, or other categories not already listed.

Any changes to the budget will require a modification to approve the new use of funds. Budget exhibits are only in the formal contract, which is why it is crucial that all changes to the budget be modified formally in Cal-E-Grants.

Please note final modification requests must be submitted 60 days prior to the project's grant term end date.

Slide 17 – Project Reporting *[Divider]*

Project Reporting

This section will review reporting requirements.

Slide 18 – Quarterly Check-Ins

The purpose of the virtual quarterly check-ins is to provide ample opportunities for Fiscal Agents to have programmatic questions and/or concerns addressed and to obtain timely technical assistance. The meetings will be led by the assigned Program Analyst and are an opportunity for the CWDB to learn more about project activities and progress, including successes, challenges, and needs. Information gathered will further assist the CWDB to identify future opportunities for the HRTP workforce model. Other CWDB staff may be in attendance as needed.

The first check-in will be scheduled shortly after the start of the grant term to ensure the Fiscal Agent has everything necessary for successful grant implementation. Additionally,

at the end of the first year of the grant period, the fiscal agent and CWDB will discuss whether check-ins will continue beyond that year.

These check-in meetings are designed to be a collaborative space. Before each check-in, the CWDB will confirm the agenda, check-in dates, and times to provide ample preparation time. We understand that regional needs can be extensive and vary from project to project. The CWDB highly encourages the attendance of required partners and key program staff to help convey all areas the project is serving.

Slide 19 – Progress Reports

Progress Reports capture and communicate important qualitative and quantitative data to share best practices, highlight project successes, and elevate broad workforce barriers and obstacles. It is an opportunity to tell the story of what's happening with the project. Responses should be detailed and thorough and include activities and outcomes that align with approved project exhibits.

Slide 20 – Progress Reports (Continued)

Reports are due semi-annually and will cover activities within the outlined reporting period. On-time completion of reports is required.

Progress reports are used to gauge project progress and performance. Because of this, progress reports with insufficient responses, unclear information, or vague details may be returned and include requested revisions. Limited responses will also be noted in project performance and evaluation. For this reason, reports are considered a high priority and must include detailed information.

Consistently late or incomplete reports may result in disciplinary action.

Slide 21 – Progress Reports (Continued)

The Semi-Annual Progress Reporting schedule will remain the same throughout the grant term. Progress reports reporting on activities from January 1st through June 30th will be due on July 20th, and reports on activities from July 1st through December 31st will be due January 20th.

Fiscal Agents/Awardees will receive a notification when the Semi-Annual Reporting templates are available in the Cal-E-Grants system. Grantees will submit responses via the Cal-E-Grants system. Detailed instructions on the submission process are in the HRTP: Healthcare Grant Administration Guide on the HRTP portal.

Slide 22 –Close-Out Report

Close-Out Reports will cover project activities for the project's entire grant term from start to end and highlight the results. Deliverables will be taken directly from the Outcomes & Deliverables exhibit for evaluation and reflection.

Close-Out Reports are due 30 days after the project's grant term end date. Please note that grant funds cannot be spent after the grant term ends. It is recommended that Fiscal Agents/Awardees begin preparing for close-out 60 days prior to the grant term end date. This may include contacting partner organizations for information that will be incorporated into the final Close-Out report.

Slide 23 –Monthly Fiscal Expenditure Reporting *[Divider]*

Monthly Fiscal Expenditure Reporting

This next section will provide an overview of the monthly invoicing process.

Slide 24 – Fiscal (Invoice) Report Submission

HRTP: Healthcare projects are state-funded and work on a reimbursement system. The Fiscal Agent/Awardee must submit monthly invoices for reimbursement through the Cal-E-Grants system. Monthly invoices are required for all projects, regardless of spending activities. *If no expenditures are incurred in a particular month, Awardee/Fiscal Agents must submit a monthly invoice requesting reimbursement for zero dollars.*

Invoices are always due on the 20th of the month following the invoicing period. For example, the July monthly invoice would be due August 20th, and a December monthly invoice would be due January 20th.

Directions for submitting monthly invoices via the Cal-E-Grants system are in the HRTP: Healthcare Grant Administration Guide on the Grantee Portal.

Slide 25 – Fiscal (Invoice) Payment

After the Fiscal Agent/Awardee submits a monthly invoice through the Cal-E-Grants system, the CWDB Program Branch will complete the initial review and approval. Once the CWDB internally approves the invoice, it is elevated to the Employment Development Department (EDD) for final check processing. The CWDB will notify grantees of the status of each submitted invoice.

Reimbursement payments are issued within 45 calendar days of the invoice being received, approved, and processed by the EDD. Please note that this 45-day timeline does not account for the time it takes for the physical check to be mailed to the location.

Mailed reimbursement warrants will be sent to the address listed on the Fiscal Agent's STD204 and/or STD205. If this address changes throughout the grant term, please immediately notify the CWDB Program Branch via the HRTP inbox.

Slide 26 – Fiscal Monitoring and Documentation

While the CWDB does not ask for proof of payment with invoices, the Fiscal Agent is responsible for all applicable record retention and should keep invoices for monitoring and auditing purposes.

Any projects that specifically list leveraged/match funds in the budget exhibits will be required to report on those expended funds during monthly invoicing.

Slide 27 – Tools & Resources *[Divider]*

Tools & Resources

There are several tools and resources available on the HRTP Portal. CWDB encourages the use of the resources outlined in the following slides.

Slide 28 – HRTP Grantee Portal

The HRTP Grantee Portal is a private webpage located on the CWDB website that houses the HRTP: Healthcare Grant Administration Guide and general grant resources and forms. Portal information and resources are updated throughout the grant term as needed.

This internal site is accessed via a password for HRTP grantees only. The log-in credentials should only be shared with trusted partners.

Slide 29 – Grant Administration Guide

One of the most important tools is the HRTP: Healthcare Grant Administration Guide. This resource provides detailed information for completing reporting and invoicing, and answers many general grant administration and compliance questions. This guide is available on the HRTP portal and should be read by all staff assisting with managing the HRTP: Healthcare grant.

Slide 30 – Proof of Participation

Proof of Participation

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

Slide 31 – Q&A

If you have any questions, please email them to the HRTP Inbox at HRTP@cwdb.ca.gov.