

Technical Assistance DSA Grantees Kickoff

11/9/2023

Agenda

Welcome!

Bank Information

Progress Reports

- **DxF Portal**

Due Dates and Timeline for Receiving Funds



Welcome!

Who is PCG?

PCG is a public sector management consulting and operations improvement firm that supports primarily public sector health, education, and human services organizations.

For this scope of work PCG is serving as **the third-party administrator (TPA) for the DSA Signatory Grant program.**

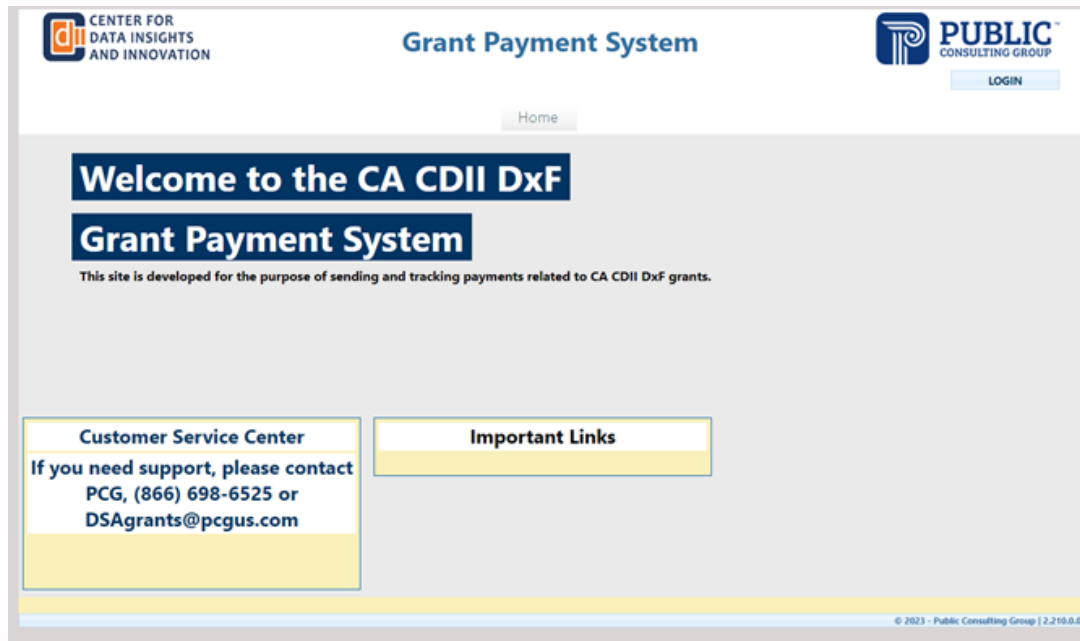
- Manages DxF Grant Portal
- Supports app submission
- Reviews applications
- Award notifications
- Fund disbursement
- Manage receipt of progress report & milestone attestations



Bank Information

How do I get my banking info to the TPA?

- The **Billing and Claiming (BAC) system** is PCG's banking account portal that is used as a one-time setup to house your W-9 and banking information so that grant disbursements can be made to you seamlessly.
- You will receive an introductory email guiding you through the process (check your Spam folder!!)





The screenshot displays the 'Grant Payment System' portal. At the top left is the logo for the 'CENTER FOR DATA INSIGHTS AND INNOVATION'. The title 'Grant Payment System' is centered at the top. On the top right is the 'PUBLIC CONSULTING GROUP' logo with a 'LOGIN' button below it. A 'Home' button is centered below the title. The main content area features a dark blue banner with the text 'Welcome to the CA CDII DxF Grant Payment System'. Below this banner, a smaller line of text states: 'This site is developed for the purpose of sending and tracking payments related to CA CDII DxF grants.' At the bottom of the page, there are two yellow-bordered boxes. The left box is titled 'Customer Service Center' and contains the text: 'If you need support, please contact PCG, (866) 698-6525 or DSAgrants@pcgus.com'. The right box is titled 'Important Links'. A copyright notice at the bottom right reads: '© 2023 - Public Consulting Group | 2.219.0.0'.

How do I get my banking info to the TPA?

- **Step 1:** Locate email from HUSData@pcgus.com with Subject: Your Grant Payment System Account Details and click on the link
- **Step 2:** BAC uses Multi Factor Authentication (MFA) to secure your banking information. You will need to choose an Authenticator App (by phone is best)
- **Step 3:** Scan the QR Code and follow the prompts to login successfully
- **Step 4:** Review and complete your profile
- **Step 5:** Load your W-9, and banking information

Set up authenticator app
MFA

1  Install an authenticator app on your mobile device.

2  Scan this QR code with your authenticator app. Alternatively, you can manually enter a secret key in your authenticator app.
[Show secret key](#)

3 Enter a code from your authenticator app

Enter a friendly device name - optional

How do I get my banking info to the TPA?

BAC requires you to only complete information in just a few screens so this can usually be completed in less than 20 minutes.

Business - Profile
Provider profile successfully updated!

General Information | **ACH Information** | Update

Business Name: _____ Business Website: _____ Doing Business As (DBA): _____
Org 1: _____
First Name: _____ Middle Initial: _____ Last Name: _____
Juliette: _____ Mullin: _____
ACH: _____

Please enter bank account information under the Payment Information tab.

FEIN/Federal ID: _____

Address

Address 1: _____ Address 2: _____
123 Main Street
City: _____ State: _____ Zip: _____
Los Angeles California 12345
Country: _____
United States

Supporting Documentation

No registration documents found.

Valid files: Any
Completed IRS Form W-9 Choose File No file chosen Enter file name Upload

Grant Payment System

Center for Data Insights and Innovation | PUBLIC CONSULTING GROUP

Vendor Super User | LOGOUT

What would you like to do? Search by keyword

Home Maintenance Reports

EFT Setup Request

Complete the following fields and click submit, located on the bottom of the screen.

Routing Number: _____ Confirm Routing Number: _____
Account Number: _____ Confirm Account Number: _____
Account Description: _____

SAMPLE CHECK

DATE: _____
PAY TO THE ORDER OF: _____ \$ _____
MEMO: _____ SIGNATURE: _____
286582805 0123456789 0101
ROUTING NUMBER ACCOUNT NUMBER

Submit

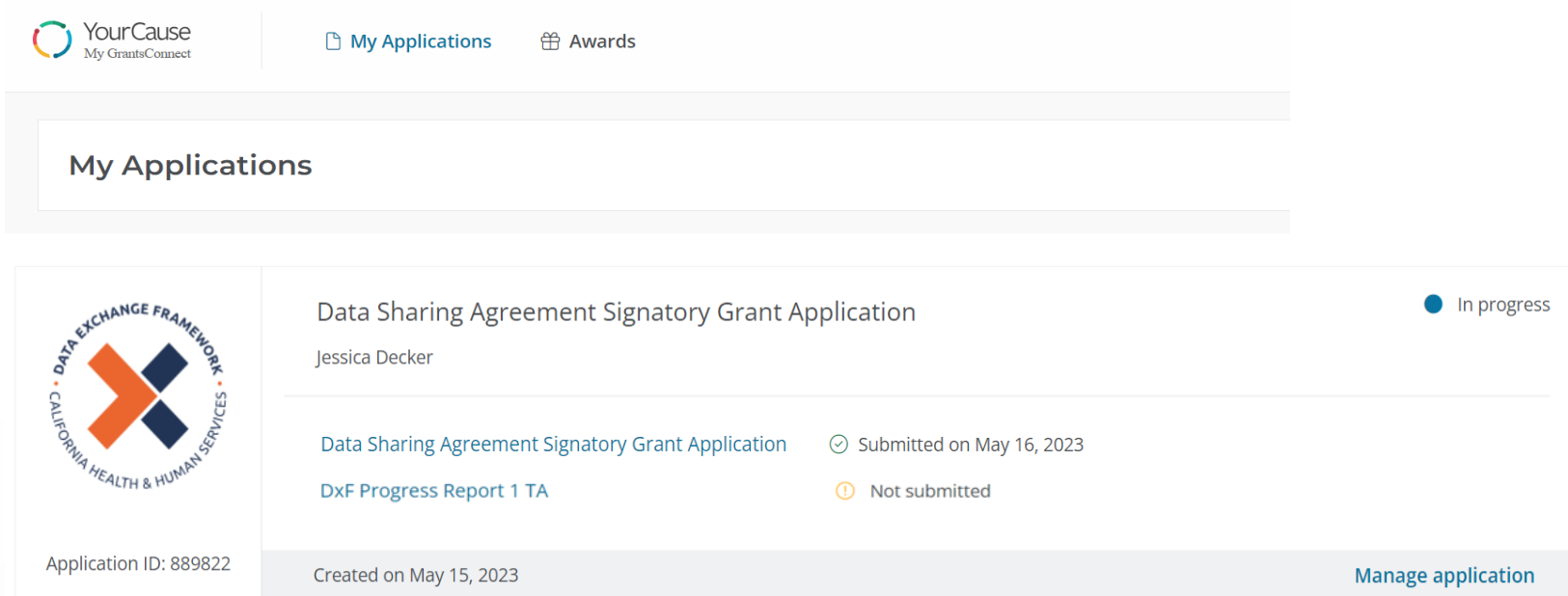
© 2021 - Public Consulting Group | 2.216.0.0



Progress Reports

Where do I find the Progress Report?


- To submit a Progress Report, log into the DxF Portal just as you did for the application
 - [YourCause - Grants Portal \(yourcausegrants.com\)](https://yourcausegrants.com)
- You'll see "My Applications" including your approved TA Data Sharing Agreement Signatory Grant Application



YourCause
My GrantsConnect

[My Applications](#) [Awards](#)

My Applications

	Data Sharing Agreement Signatory Grant Application In progress
Jessica Decker	
Data Sharing Agreement Signatory Grant Application	Submitted on May 16, 2023
DxF Progress Report 1 TA	Not submitted
Application ID: 889822	Created on May 15, 2023 Manage application

Where do I find the Progress Report?

- Click on the Application Forms link, specifically “DxF Progress Report 1 TA”

The screenshot shows a web interface for the "DxF Progress Report 1 TA". On the left, there is a sidebar with the "DATA EXCHANGE FRAMEWORK CALIFORNIA HEALTH & HUMAN SERVICES" logo, "Instructions" (Fill out the form to your right. You can save progress and return later to submit the form.), and "Application Forms" (Saved, including Agreement, Signatory Grant, and Application). The main content area is titled "DxF Progress Report 1 TA" and includes "Applicant Information" for Jessica Decker (148 State St 10th floor, Boston, , 02109, US; jdecker@pcgus.com | 4174135384) with a "Manage applicants (1)" link. Below is the "FORM QUESTIONS" section with a "Download" link. The form fields include "Organization Name" (Test org), "Progress Report Submitter*" (empty), and "Contact Number*" (empty).



What will I need to report in the Progress Report?

Organization Name	[auto-populated]
Progress Report Submitter	Grantee provides
Contact Number	Grantee provides
Contact Email	Grantee provides
Award Notification Date	[auto-populated]
Milestone 1 Due By	[auto-populated]
Milestone 2 Due By	[auto-populated]

Grantees have 12 months from the time of their award to reach Milestone 1, and 24 months from the time of their award to reach Milestone 2. Grantees that do not achieve Milestones in those timeframes may forfeit their grant award. Until Milestone 2 is achieved, Grantees will need to submit Progress Reports each quarter, beginning in 2024; *Refer to the DSA Signatory Grants Applicant Guidance Document for further details.*

Please provide your progress updates for Milestone 1 and Milestone 2 below.



What will I need to report in the Progress Report?

Milestone 1

Milestone Definition: Grantee demonstrates that they have procured resources that will account for at least 50% of grant budget. Refer to the DSA Signatory Grants Applicant Guidance Document for further details.

Grantees will have 12 months from the time of their award notification to reach Milestone 1. Please select one of the following option:

- Providing Progress Report; not ready to demonstrate Milestone 1.
- Ready to demonstrate Milestone 1.
- Reached the 12-month mark and will not be able to demonstrate Milestone 1.



What will I need to report in the Progress Report?

Milestone 1

- If you are not yet ready to demonstrate Milestone 1:
 - Provide a brief narrative regarding your progress towards achieving Milestone 1.

- If you are ready to demonstrate Milestone 1
Submit with this Progress Report, one or more of the following documents, showing Resources that account for at least 50% of the grant budget:
 - A copy of the signed contract for Health IT vendors, external personnel, and other external Resources or
 - A signed attestation that the Grantee has signed a contract for external resources (e.g., health IT vendors, external personnel, or other external resources) and/or they have procured or allocated internal personnel resources that account for at least 50% of the grant budget.
 - *Please note that you can download a template for the signed attestation from the Progress Report within the DxF Portal – no need to create your own.*

- If you have reached the 12-month mark and are not able to demonstrate Milestone 1.
 - Provide the reason for reaching the 12-month mark without achieving Milestone 1.
 - Provide a plan for achieving both Milestones 1 & 2 over the subsequent 12 months.



What will I need to report in the Progress Report?

Milestone 2

Milestone Definition: Grantee demonstrates that they have achieved all of the Outcomes listed in the TA Grant Application. Refer to the DSA Signatory Grants Applicant Guidance Document for further details.

Grantees will have 12 months from the time of their award notification to reach Milestone 1. Please select one of the following option:

- Providing Progress Report; not ready to demonstrate Milestone 2.
- Ready to demonstrate Milestone 2.
- Reached the 24-month mark and will not be able to demonstrate Milestone 2.



What will I need to report in the Progress Report?

Milestone 2

- If you are not yet ready to demonstrate Milestone 2:
 - Provide a brief narrative regarding your progress towards achieving Milestone 2.

- If you are ready to demonstrate Milestone 2
Submit with this Progress Report, your “Proof of Outcome for Milestone 2” artifact(s); Please select the Proof of Outcome documents [see next slide].

- If you have reached the 24-month mark and are not able to demonstrate Milestone 2.
 - Provide the reason for reaching the 24-month mark without achieving Milestone 2.



What will I need to report in the Progress Report?

- If you are ready to demonstrate Milestone 2 (continued from previous slide)
Submit with this Progress Report, your “Proof of Outcome for Milestone 2” artifact(s); Please select the Proof of Outcome documents in the table below:

Grant Outcome	Proof of Outcome for Milestone 2
1 Identifying and Contracting with a Technology Solution	<input type="checkbox"/> Copy of Contract with HIT vendor <u>or</u> <input type="checkbox"/> Copy of completed technology solutions assessment
2 Implementing a Technology Solution Capable of Supporting Real-Time Data Exchange	<input type="checkbox"/> Screenshot of test demonstrating a real-time data exchange transaction <u>or</u> <input type="checkbox"/> Final invoice or attestation signed by vendor demonstrating completion of technology implementation*
3 Adjusting, Upgrading, or Adopting a Certified EHR or Other Electronic Record System	<input type="checkbox"/> Final invoice or attestation signed by EHR/electronic record system vendor demonstrating completion of adjustments, upgrades, or adoption*
4 Creating and Providing Training for New Workflows	<input type="checkbox"/> Copy of final training and/or technical assistance materials

**Please note that you can download a template for the signed attestation from the Progress Report within the Dx/F Portal – no need to create your own.*



Due Dates and Timeline for Receiving Funds

Progress Report Due Dates

Year	Progress Report Due Date	Estimated Payment Date for Reports Attesting to a Milestone
2023	Optional reports attesting to Milestone completion will be accepted anytime during 2023.	Funds will be disbursed on an ongoing basis.
2024	March 29, 2024	April 28, 2024
2024	July 31, 2024	August 30, 2024
2024	September 30, 2024	October 30, 2024
2024	December 31, 2024	January 30, 2025
2025	March 31, 2025	April 30, 2025
2025	July 31, 2025	August 30, 2025
2025	September 30, 2025	October 30, 2025
2025	December 31, 2025	January 30, 2026
2026	March 31, 2026	April 30, 2026



Resources

- Questions?
 - Questions on billing, claiming, and progress reports can be provided to DSAGrants@pcgus.com
 - Questions on the DSA Grants program generally can be provided to cdii@chhs.ca.gov
- [DSA Signatory Grants Guidance Document](#)
- [DxF-DSA Landing Page](#)





Solutions that Matter