

Song-Brown Registered Nurse (RN) Education Program Funding

Technical Assistance Guide September 2022

About Song-Brown

- Song-Brown provides funding to education programs:
 - Family Nurse Practitioner/Physician Assistant training programs
 - Pre-licensure Registered Nurse programs:
 - Associate Degree of Nursing (ADN)
 - Bachelor of Science, Nursing (BSN)
 - Entry-Level Master's (ELM)
 - Family Medicine, Internal Medicine, Pediatrics, OB/GYN residency programs
 - Licensed Midwifery and Certified Nursing Midwifery training programs
- Song-Brown provides financial incentives to programs to:
 - Graduate individuals who practice in medically underserved areas
 - Enroll members of underrepresented groups in medicine
 - Locate the program's main training site in a medically underserved area
 - Operate a main training site at which the majority of the patients are Medi-Cal recipients

Application Release Dates

Registration: Open now Application release: October 3, 2022 Early submission review: November 1, 2022 Application deadline: November 15, 2022

All applications open and close at 3:00 p.m.

Before You Apply

- If your program requires approval to contract from a coordinating authority, please inform the authority of terms and conditions contained in the Grant Agreement.
- Applicants must agree to the terms and conditions before receiving funds.
- HCAI will not make changes to the terms and conditions specified in the Grant Agreement.
- Funds shall not supplant existing state or local funds.

Changes for 2022

- Up to \$25.3 million in funding available
- Maximum award of \$900,000 per eligible RN program (ADN, BSN, ELM)
 - Maximum 30 student slots supported
 - Maximum \$15,000 per student slot
- Scoring criteria 2.4 attrition rate updated
 - 0, 5, or 10 points
- Requesting training site payer mix
- Removal of student high school information
- New Song-Brown email: songbrown@hcai.ca.gov

Information to Gather: Program Data

- Correct Grant Agreement and Payee Data record (STD-204) signatories
- Enrollment rates, attrition rates, and NCLEX pass rates
- Name and full address for training sites used in Academic Year (AY) 21/22
- Training site payer mix
- BRN approval letter

Information to Gather: Students and Graduates

- Data for AY 19/20 and 20/21 graduates, including **current** practice site location and race/ethnicity.
- National Provider Identification number for Entry-Level Master's (ELM) students and graduates you enter.
- Race/ethnicity data for students graduating AY 22/23 and 23/24

Helpful Resources

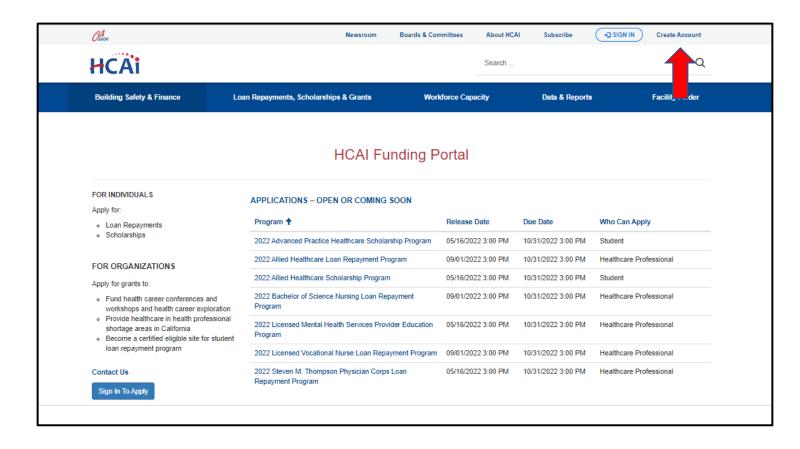
- HCAI eApplication (eApp): https://funding.hcai.ca.gov/
- The RN Grant Guide, RN Scoring and Evaluation Process, and Song-Brown Program Glossary: https://hcai.ca.gov/loans-scholarships-grants/grants/song-brown/

eApp Registration

System Requirements

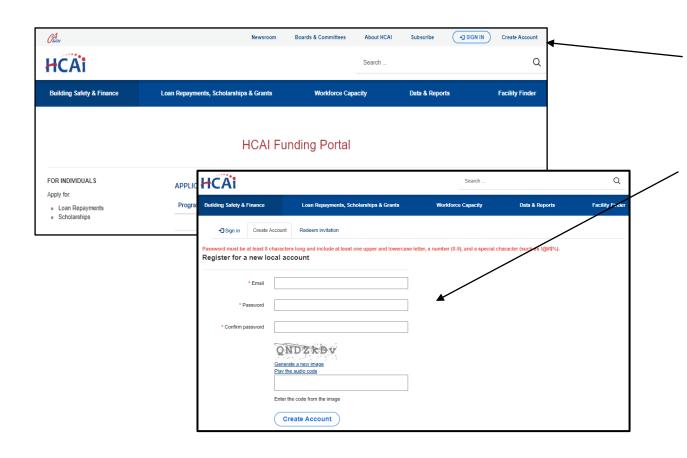
- For the best experience, use Google Chrome or Microsoft Edge.
- Internet Explorer is not supported.

Creating an Account



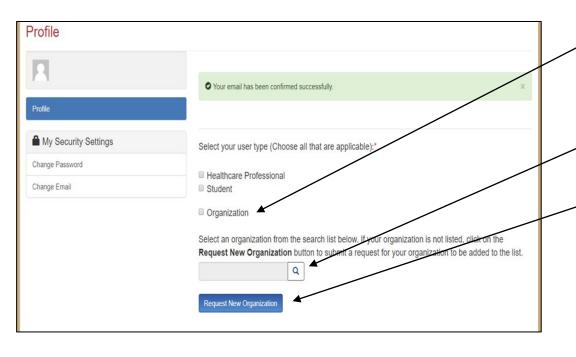
If you are a new applicant, register now – do not wait.

Registration



- 1. Select "Create account" at the eApp homepage at: https://funding.hcai.ca.gov.
- 2. Complete the required fields.

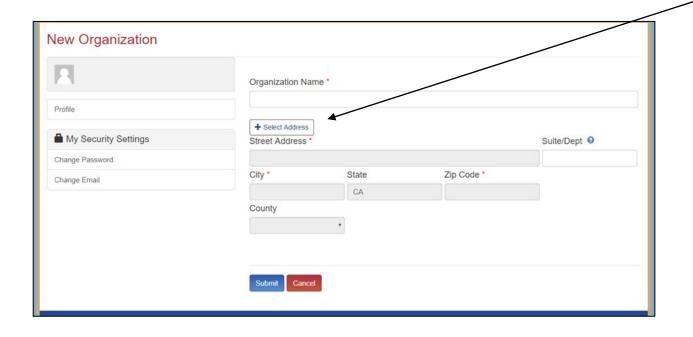
Setting up Your Profile



- 1. Check the "Organization" box to gain access to Song-Brown RN applications (do not check the "HealthCare Professional" box).
- 2. Click the magnifying glass to search for a pre-existing organization.
- 3. Click "Request New Organization" to submit a new organization for approval.
- 4. Once you have selected or submitted an organization, it will populate the search field.

Note: Most organizations are in the system. Returning applicants must use use the search function before requesting a new organization.

Adding a New Organization



- 1. Enter the new "Organization Name".
- 2. Click the "+Select Address" button.
- 3. A new window opens, and you can enter and search for an address.
- 4. Click the confirmed address and it will auto-populate the address fields on the page.

Note: Song-Brown staff will review the new organization request within 5 business days. During this time, you may still begin an application.

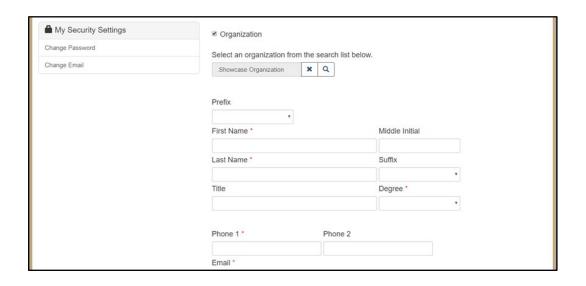
Email Confirmation



- Click "Confirm Email" to validate
 your email address for your eApp account
- You will receive a validation email.
- 3. Click "Activate Account" to go to the Profile page.

Note: Please allow 1-3 minutes to receive the email. If you don't see the email, please check your spam folder.

Completing Your Profile



- 1. Return to your profile page.
- 2. Enter all required fields.
- 3. When finished click the "Save" button.
- 4. If there are no errors on the page, you will receive a message that your profile has been updated successfully.

Note: Incomplete information may delay your registration.

Account Roles

Dear Showcase Person.

Thank you for validating your Office of Statewide Health Planning and Development (OSHPD) Funding e-App account.

At this time, your account is flagged as a Grant Preparer. If you are a Program Director, please email songbrown@oshpd.ca.gov to request your account permissions to be upgraded. Only Program Directors may create and submit applications.

Thank you,

- 1. All newly created accounts are assigned the "Grant Preparer" role.
- 2. If you are the training Program Director, email SongBrown@hcai.ca.gov to request the "Program Director" role.
- Only accounts with the "Program Director" role may initiate and submit applications.
- 4. Once Song-Brown staff approves your request you will receive a follow-up email confirming the approval.

Note: Program Directors may initiate, view, edit, and submit applications. Grant Preparers may view and edit applications only.

Assigning Other Users

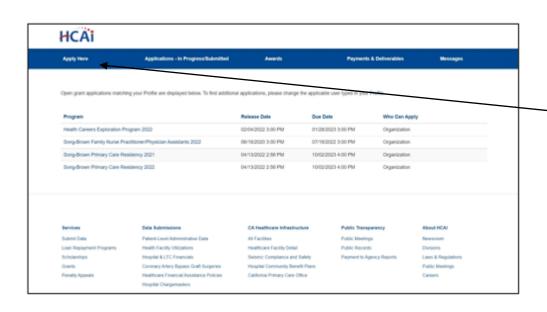




- 1. Program Directors have an additional tab on their "Profile" page called "Assign Other Users".
- 2. Navigating to this page from your "Profile" page allows you to add users who may only view and edit applications.
- 3. Click the "Add User" button to give registered Grant Preparers access to your applications.

Note: Grant Preparers must set up their profile before a Program Director can add them to the Grant Preparer list.

Apply Here



- 1. Navigate to the "Apply Here" page on the main menu.
- 2. Select the applicable "Song-Brown Registered Nurse" link.

Helpful Tips

Useful Information

Navigating the application

Use the "Previous" and "Save & Next" buttons found at the bottom left of each page.



Saving your application

The eApp saves your application each time you click "Save & Next". Navigate to the "Applications-In Progress/Submitted" page to resume your application.



Useful Information, Continued

Asterisks

A red asterisk indicates a required response before you can proceed to the next page.



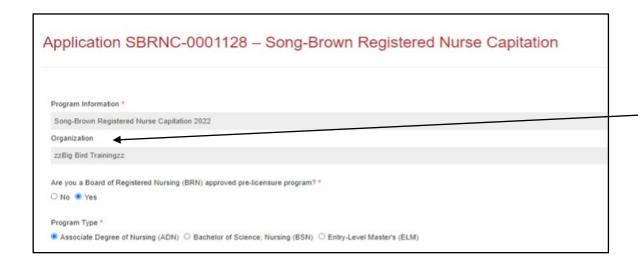
Tooltips

Throughout the application you may see a blue circle with a question mark at the end of a question, title, or sentence. Click on these icons for additional information.



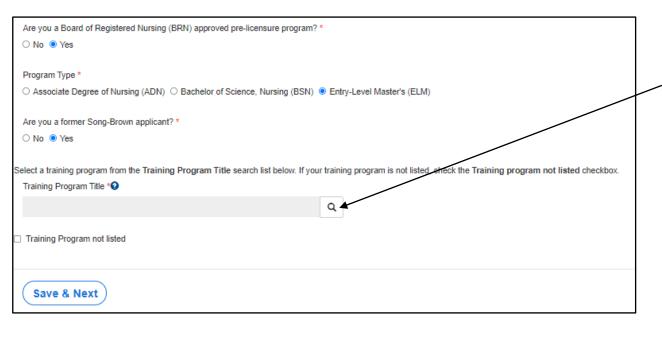
Starting the Application

Program Information



- 1. Your program information prepopulates with information you entered in your "Profile" page.
- 2. The "Organization" name is the applicant's organization as listed on the applicants eApp profile.
- 3. The "Organization" name is not editable in the application. Go to the applicant's profile to change it.
- 4. Select the "Program Type" you want to apply for.

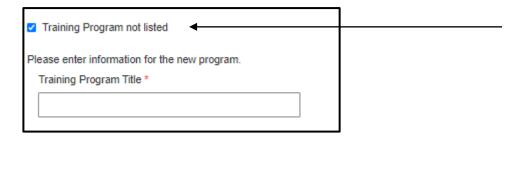
Program Information: Training Program (1/2)

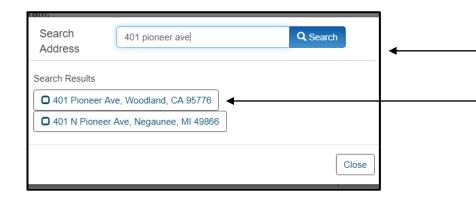


- 1. The "Training Program Title" is the official name of the school's training program and will be listed on the Agreement.
- 2. Select an existing "Training Program Title" by clicking on the magnifying glass.
- 3. To link data from prior applications to the new application, you must use the magnifying glass search function to select the "Training Program Title" from the list.

Note: You must use the magnifying glass to search for your program. Most training program names exist in the system. You cannot enter an already existing training program name manually and expect to import data from a prior application.

Program Information: Training Program (2/2)

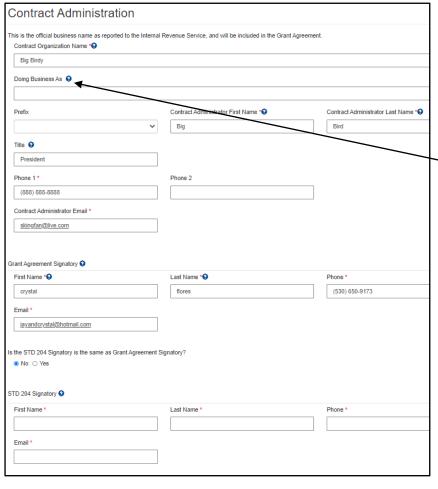




- If your training program is not listed, check the box "Training Program not listed". New fields appear.
- 2. Type in the program name under "Training Program Title" as the school name, program type. EX: University of the West, ADN Program.
- 3. Click the "+Select Address" button.
- 4. A new window opens and allows you to enter and search for an address.
- 5. Click the confirmed address and it will autopopulate the address fields on the page.

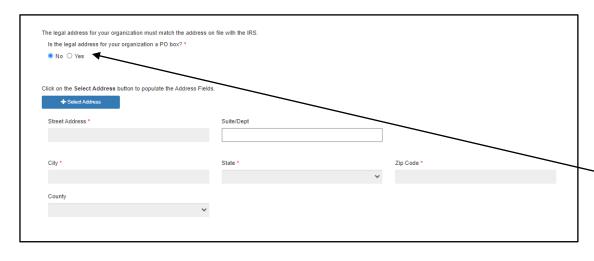
Note: You will see this address validation feature throughout the application.

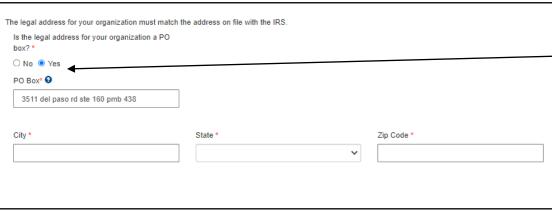
Contract Administration



- 1. Before completing this page, you must verify the information with your contracts or finance office to ensure accuracy. Incorrect information delays agreements.
- 2. Enter the "Contract Organization Name". This is the official business name as reported to the Internal Revenue Service and will be included in the Grant Agreement.
- 3. If applicable, include the Doing Business As (DBA) portion of the name. EX: For the organization "Green Foundation DBA Blue College", Green Foundation would go in the Contract Organization field. Blue College would go in the Doing Business As field.
- 4. Enter the "Grant Agreement Signatory". This is the signatory authorized to enter into a grant agreement on behalf of your organization.
- 5. Enter the "STD. 204 Signatory". This is the signatory with expertise on tax reporting for your organization.

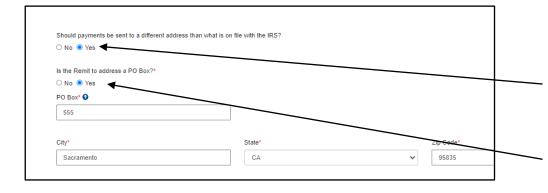
Contract Administration: Legal Address





- 1. Enter the legal address for your organization. It must match IRS records.
- If the legal address is a
 street address, select "No"
 here and use the "Search
 Address" button to select the
 address.
- 3. If the legal address is a PO Box address, select "Yes" here and complete the new fields that display.

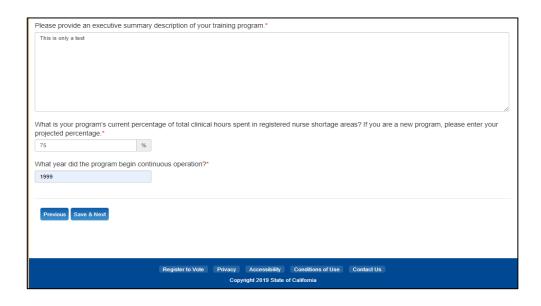
Contract Administration: Remit To Address





- The remit address is where payments will be mailed.
- If the remit and legal address are the same, select "No" here. If they are different, select "yes" and complete the fields that appear.
- For a PO Box remit address.
 - Select "Yes" and complete the fields that display.
- For a physical remit address
 - Select "No" here.
 - Then select "+ Select Address". Enter the address, select Search, then select the correct address.
 - If applicable, enter the suite or department information in the "Suite/Dept" field.
- Enter the Authorized Representative for the Payee.
 This is the person authorized to receive warrants.

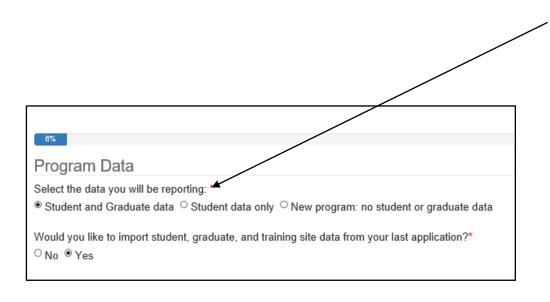
Program Description



- 1. Complete all required fields.
- 2. There is a maximum 2,500 character limit for each question.
- 3. After completing this page, click "Save & Next".

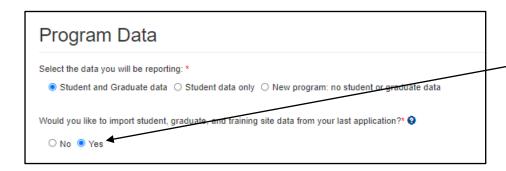
Note: If you exceed the character limit, you will receive a pop-up message. If you copy and paste text from another document, text will be cut off at 2,500 characters for each page. Please double-check the information you enter and make sure everything is captured.

Program Data: Reporting Option



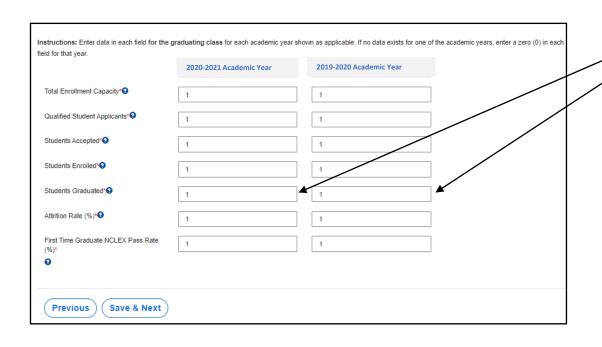
- Ensure you select the correct reporting option for your program here. Additional fields populate according to your selection.
- Select "Graduate and Student Data" if you have 20/21 or 19/20 graduates.
- Select "Student Only" if you have no 20/21 or 19/20 graduates but do have students with a projected graduation in 23/24 or 22/23.
- If your program was recently established and has no graduate or student data to report, select "New Program".

Program Data: Import Option



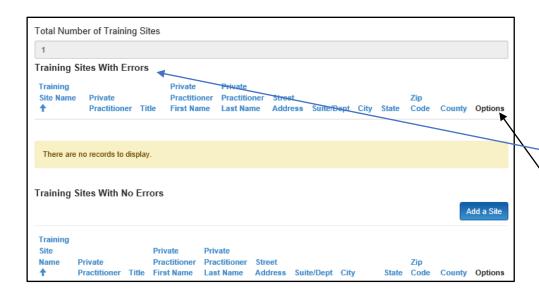
- 1. The import data option defaults to "Yes".
 - Data from your prior application will
 only import if you click "Yes" here,
 AND used the magnifying glass
 search function on the
 "Program Information" page to select
 the "Training Program Title".
 - If you did not apply for the 2021 RN cycle, select "No" to the import question. In this case, you must enter training site, student, and graduate data manually.

Program Data: Data Table



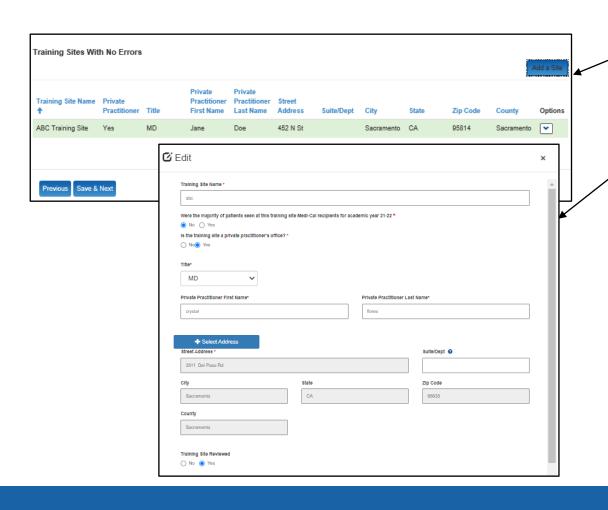
- 1. The number of graduates here must match the corresponding number entered on the Graduate Data page for AY 19/20 and 20/21 respectively.
- 2. After completing this page, click "Save & Next".

Training Sites: Review Imported Sites



- 1. Include all training sites used in AY 21-22 on your application.
- If you selected "Yes" to import prior year's data on the "Program Data" page, imported training sites display on the errors list.
- 3. All imported training site records must be reviewed by selecting "Edit" from the dropdown list.
- 4. Open each record and input required data (if needed) in order to move the record to the non-errors list.

Training Sites: Add New Sites



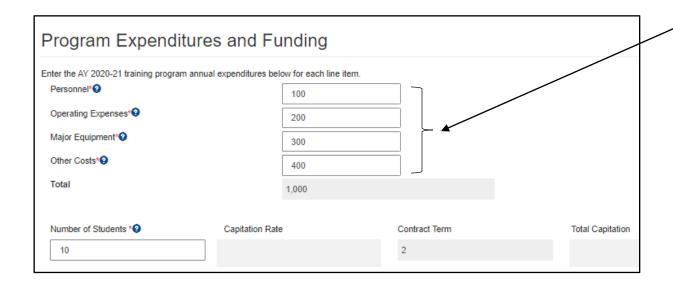
- Click the "Add a Site" button.
- A pop-up window will display.
- The new payer mix question has been added here.
- Complete all required fields.

Training Sites: Edit or Delete Sites



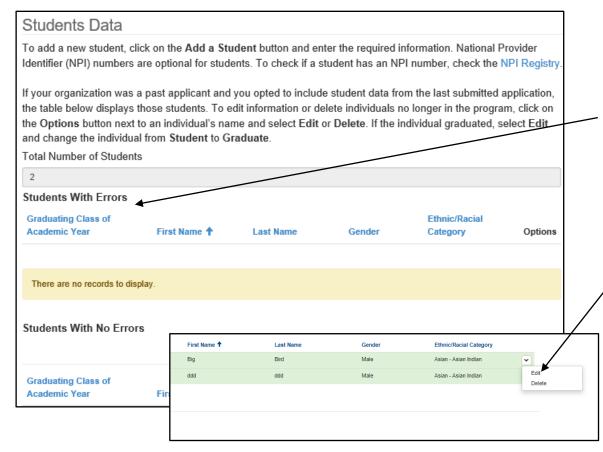
- 1. Scroll to the far right for the 'Options' column.
- 2. Click the down-arrow button next to the desired entry.
- 3. This menu gives you the options to edit or delete each individual entry.
- 4. After completing this page, click "Save & Next".

Program Funding and Expenditures



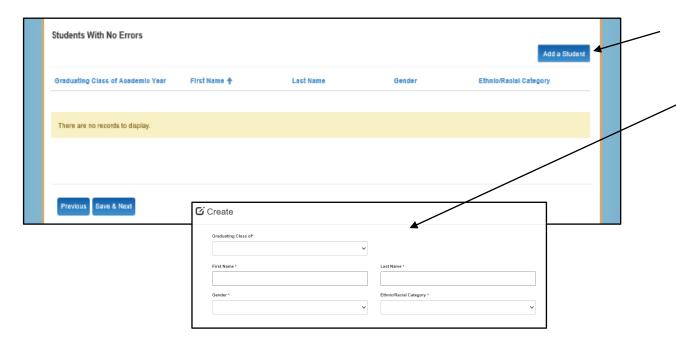
- 1. You must enter your actual budget figures for the year, not the amount of grant funding requested.
- 2. The "Total" program expenses must be greater than the total requested Song-Brown funding.
- 3. After completing this page, click "Save & Next".

Student Data: Review Imported Students



- 1. Your application must include all current students with a projected graduation in AY 22/23 and 23/24.
- 2. If you selected "Yes" to import prior year's data on the "Program Data" page, student data from the prior year's application displays on the errors list.
- You must review all imported student
 records by selecting "Edit" from the drop-down list.
- 4. Open each record and input required data (if needed) in order to move the record to the non-errors list.

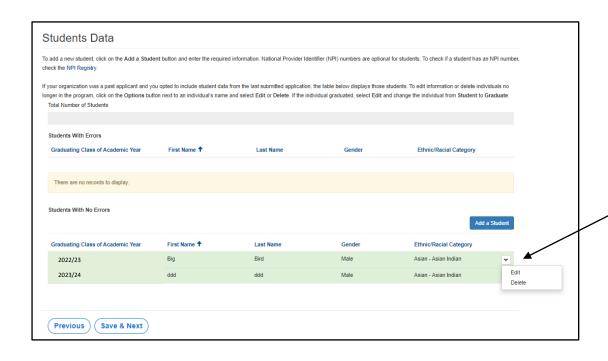
Student Data: Add New Students



- Click "Add a Student".
- A pop-up window will display.
- Complete all required fields.

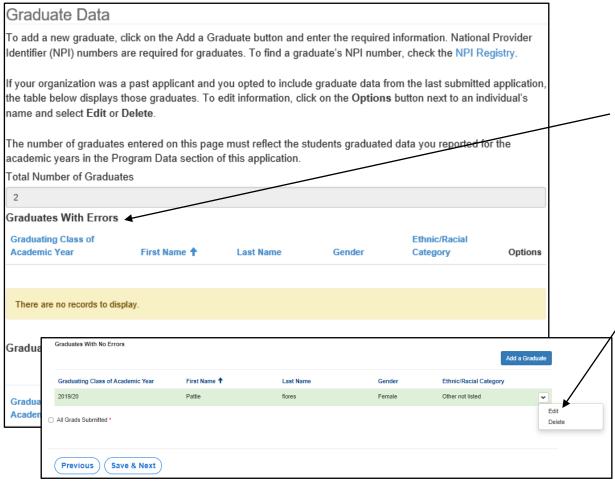
Note: Ensure only valid student information is listed and data issues are resolved. Students remaining on the errors list after application submission may not be considered for scoring.

Student Data: Edit or Delete Students



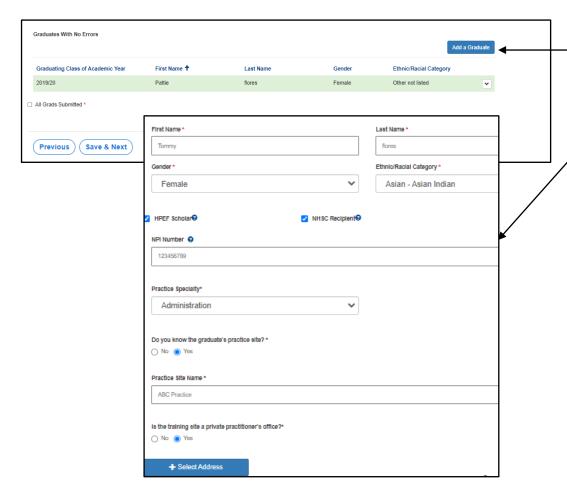
- 1. Scroll to the far right for the "Options" column.
- 2. Click the down-arrow button next to the desired entry.
- 3. This menu gives options to edit or delete each individual entry.
- 4. After completing this page click "Save and Next".

Graduate Data: Review Imported Graduates



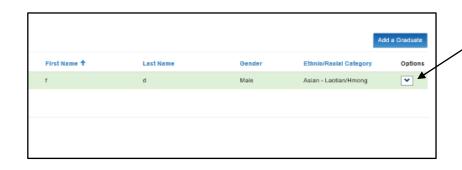
- 1. Your application must include all AY 19/20 and 20/21 graduates.
- 2. If you selected "Yes" to import prior year's data, the graduate data from the prior year's application displays on the errors list.
- 3. You must review all imported student records by selecting "Edit" from the drop-down list.
- 4. Open each record and input required data (if needed) to move the record to the non-errors list.

Graduate Data: Add New Graduates



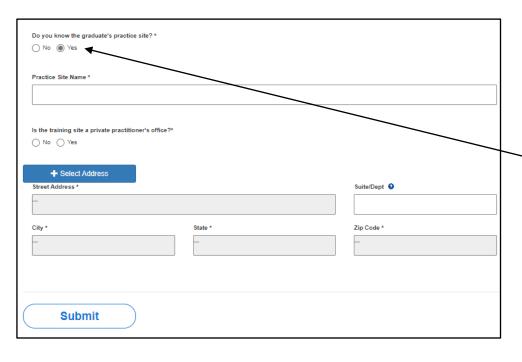
- Click "Add a Graduate".
- A pop-up window will display.
- Complete all required fields.
- Graduate Practice Specialty is only required for ELM program graduates. For ELM graduates that never began practice, select "Other" and enter Not Applicable.
- Note: You must ensure only valid graduate information is listed and data issues are resolved. Graduates remaining on the errors list after application submission may not be considered for scoring.

Graduate Data: Edit or Delete Graduates



- 1. Scroll to the far right for the "Options" column.
- 2. Click the down-arrow button next to the desired entry.
- 3. This menu gives options to edit or delete each individual entry.
- 4. After completing this page, check the box to confirm then click "Save and Next".

Graduate Data: Practice Site Information



- 1. You must add graduate practice site information for all graduates.
- 2. If your graduate is working in California and you know their practice site:
 - Select "Yes" under "Do you know the graduate's practice site?"
 - Use the + Select Address button to search for the practice site name.
- 3. If the practice site is unknown, select "No" to the practice site question and select "Other".

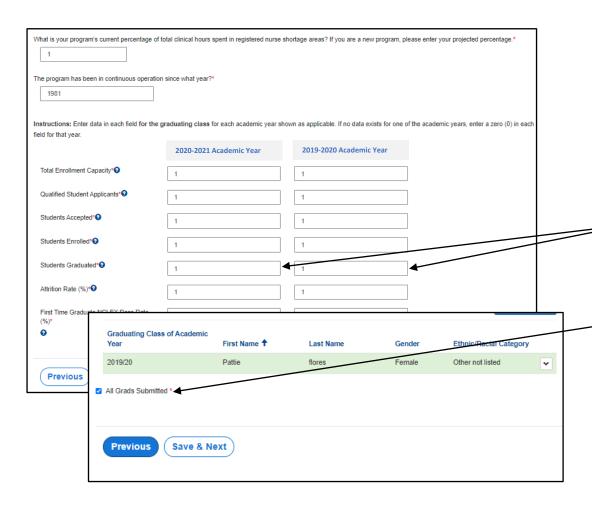
Graduate Data: Out of State Graduates



If your graduate is working outside of California:

- Select "No" as your response regardless if you know the practice site name and address.
- Select "Out of State" or "Unknown" under "Reason Practice Site Unknown."

Graduate Data: Total Graduates



- The number of graduates listed on the Graduate Data page must match the number listed on the Program Data Page Columns for 19/20 and 20/21 "Students Graduated".
- 2. Check "All Grads Submitted" on the Graduate Data page, then click "Save & Next" to continue.

Common Application Errors

- 1. Incorrect Signatory: Provided incorrect signatories for the Grant Agreement and/or Std 204 Payee Data Record. Verify with your finance or contracts office before submitting the application to ensure this information is correct or the agreement may be delayed.
- 2. Incorrect or Missing Required Documents: Did not attach the correct documents. Ensure you have attached the required documents as attaching the incorrect documents is cause for ineligibility.
- 3. Outdated Remit To Address: Entered an outdated remit to address for payments. Verify with your finance office that there has been no change to the remit to address. If there is an outdated address, you may experience lost or delayed payments.

Common Data Import Errors

- 1. Wrong Training Program Name: Entered a new Training Program Title for an existing program. Ensure you use the search function to select the exact Training Program Title used in the prior application, or the data import feature will not work. If you applied last year and are having problems identifying the correct training program name, contact Song-Brown at SongBrown@hcai.ca.gov
- 2. Missing Data: Did not include all training site, student and/or graduate data. Applicants must verify the data import, enter any new data, and verify all data before submitting.
- 3. Inconsistent Data: Data entered is inconsistent with the prior application. Ensure reporting method consistency by comparing the current application to the prior application.

Required Documents

Before Attaching Documents:



After Attaching Documents:

Approval Letter

Upload the most recent program approval letter from the appropriate accrediting/approval bodies. Approval Letter Example

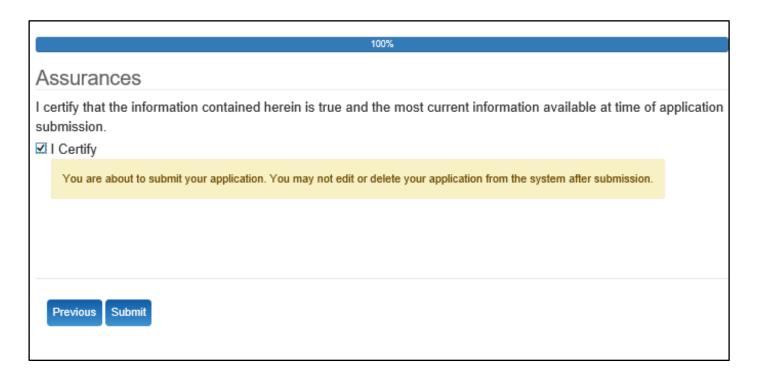
Approval Letter Upload

1 file uploaded, 1 file required.*

- The red button on this page indicates required documents.
- For example, click on the "Approval Letter Upload" button to upload the required letter.
- Once you upload all required documents, the buttons turn green signifying that you may continue.
- Ensure your document upload is titled to begin with "Appr_" for the system to accept the document.
- Click "Next" to save and continue to the final page of the application.

Note: You may delete an uploaded document by clicking the down-arrow button next to the desired entry.

Assurances



- 1. Read the statement.
- 2. Agree and certify to the statement by checking the box.
- 3. Click the "Submit" button.

Note: Only Program Directors can submit an application. The "Submit" button will not appear for Grant Preparers. Once you submit an application, you cannot edit or delete your application.

Submission Complete

Thank you for submitting your application. Your application has been received and will be reviewed. Return to your dashboard.

- 1. Once your application is submitted, you will see the message in green below.
- 2. You may navigate to your eApp dashboard by following the dashboard link in the message.

View and Print Application



- 1. To view or print your application, click "Applications In Progress/Submitted" tab.
- 2. Select the arrow dropdown on the application you want to view or print.

Post-Submission Maintenance

Program Directors must:

- Log into their eApp profile to maintain current contact information as well as maintain the approved Grant Preparer list. Otherwise, your program may miss important notifications.
- Provide notification when the Agreement Signatory, Payee Data Signatory, or Grant Agreement contact changes by emailing SongBrown@hcai.ca.gov. Failure to do so may delay the start of your Grant Agreement.

DocuSign Instructions (1/2)

- You must confirm your signatories with your contracting office BEFORE submitting your application to avoid delays with agreement execution.
- Agreements will be routed for signature through DocuSign email, based on the Grant Agreement Signatory and Payee Data Record 204 Signatory contacts provided on your application.
- DocuSign emails must be sent directly to the Agreement Signatory and Payee Data Signatory email addresses, EX: <u>JaneSmith@ucx.edu</u>. Do not provide a shared email address such as <u>provost@ucx.edu</u> or <u>contracts@ucx.edu</u>.
- Signatories should check their spam/junk folder if they can't find their DocuSign email as some systems may flag those emails as spam.
- Signatories cannot edit any documents in DocuSign, they can only sign off on them. NO edits are allowed. To receive a grant, you must accept all agreement terms as provided.

DocuSign Instructions (2/2)

- Each signatory, as designated on the application, will receive a DocuSign email specific to their role.
- Only the designated signatory can open the DocuSign email, otherwise the link may become invalid.
- No one can be CC'ed on the DocuSign emails, however designated signatories can download a copy of what they sign.
- DocuSign links expire within 30 days. Review the agreement template in the Grant Guide on the SB web page before receiving the DocuSign to expedite your review and signing process.

Questions?

- Email us at SongBrown@hcai.ca.gov.
- Email subject line must include the application number and program name.