

Accessing and Submitting Your Progress Report

Guide on how to access, download, and submit your Progress Report

Table of Contents

- What is a Progress Report?
- Progress Report Notification
- Accessing Your Progress Report
- Confirm Contact and Employer Information
- Download Progress Report
- Questionnaire
- Employment Verification
- Progress Report Upload

What is a Progress Report?

- Over the course of a Grantee's service obligation, they will be required to download and submit progress reports. The amount of progress reports the Grantee must complete is determined by the length of the program's service obligation. Every six months a progress report will be due. If the program's service obligation is 12 months, then the Grantee will only have two progress reports to complete.
- Progress reports are a program deliverable that is used to verify the Grantee is meeting the hour requirements set forth in their Grant Agreement.
- Progress Reports must be signed by both the Grantee and the Grantee's Direct Supervisor or appropriate designee.
- Once progress reports are available, Grantees will receive an email notifying them they have a progress report available.
- Grantees will have to access their account to download the progress report and upload the progress report once completed.

Progress Report Notification

- Once a progress report is released and available to the Grantee for completion, each Grantee will be notified via an email notification from the eApp.
- The sender will be: “# SVC-Dynamics no-reply@hcai.ca.gov”

NOTE: Please make sure you add the email above to your address book or safe sender lists so all future emails get to your inbox.

- If a Grantee does not see the notification in their email inbox, they will need to also check their “Spam/Junk” folder.
- All notifications will be sent to the email address that is listed on the Grantee’s profile page.

Accessing Your Progress Report

- Once progress report is released, the Grantee will receive a notification. See figure 1.1.
- Grantee can click on the “Funding e-App” link within the notification or visit <https://funding.oshpd.ca.gov/>.
- Once on the Funding e-App site, Grantee will need to sign into their account.

Figure 1.1

From: # SVC-Dynamics no-reply@hcai.ca.gov;

To: Grantee Name **[Email Address on Profile]**

Subject: Your Progress Report is Ready

Dear **[Grantee Name]**,

You currently have a progress report due for **[Program Name and Year]**. Please log into your [Funding e-App](#) account and navigate to the Payments/Deliverables tab to complete the necessary documents by the **[Due Date]**.

If you have any questions, please contact us.

Thank you,

Department of Health Care Access and Information

This is an automatically generated e-mail. Please do not reply.

Accessing Your Progress Report (cont.)

- Once Grantee has signed into their account, they will follow the following steps:

1. Click on the “Payments/Deliverables” tab at the top.
2. Under the “Deliverable #” columns, click on the deliverable that is due.

NOTE: Deliverables that are highlighted in “blue” are links and clickable. If the deliverable name under the “Deliverable #” column is “black,” the Grantee is not able to click and edit that deliverable.

OSHPD

Profile Sign Out MICHAEL ANDRJIICH

Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Listed below are the status of your deliverables. To receive payments, please submit progress reports and documents (deliverables) to OSHPD as defined in your grant agreement. Click on a grant number to submit a deliverable.

For SLRP awardees: You are not required to submit deliverables for payments to be processed. Site Administrators submit EVFs on behalf of awardees. The information below is for monitoring your payments.

Note: To request an extension for a deliverable, click on the Options button and select Request an Extension. Common acceptable reasons for extensions include: maternity leave, medical leave, loss of job, or other extended leaves of absence.

Deliverable #	Grant #	Deliverable Number Order	Deliverable	Due Date	Status	Payment	Amount Paid	Remaining to be Paid
GA20-BSNSP-1013008-GDV1	GA20-BSNSP-1013008	1	Graduation Date Verification Form	04/30/2021	Due	0.00	0.00	0.00
GA20-BSNSP-1013008-EVF	GA20-BSNSP-1013008	2	Employment Verification	04/30/2021	In Progress	0.00	0.00	0.00
GA20-BSNSP-1013008-PAYMENTPROGRESSREPORT 1	GA20-BSNSP-1013008	3	Progress Report	04/30/2021	In Progress	0.00	0.00	0.00
GA20-BSNSP-1013008-PAYMENTPROGRESSREPORT 2	GA20-BSNSP-1013008	4	Progress Report		Upcoming	0.00	0.00	0.00

Services

- Submit Data
- Loan Repayment Programs
- Scholarships
- Grants
- Penalty Appeals

Data Submissions

- Patient-Level Administrative Data
- Health Facility Utilizations
- Hospital & LTC Financials
- Coronary Artery Bypass Graft Surgeries
- Healthcare Financial Assistance Policies
- Hospital Chargemasters

CA Healthcare Infrastructure

- All Facilities
- Healthcare Facility Detail
- Seismic Compliance and Safety
- Hospital Community Benefit Plans
- California Primary Care Office

Public Transparency

- Public Meetings
- Public Records
- Payment to Agency Reports

About OSHPD

- Newsroom
- Divisions
- Laws & Regulations
- Public Meetings
- Careers

Accessing Your Progress Report (cont.)

• The “Status” column will indicate the status of each deliverable for the Grantee. Below are the following statuses and their meaning:

- Due – Deliverable is due and has not been opened nor submitted.
- In Progress – Deliverable has been opened but has not been submitted.
- Upcoming – Deliverable has not been released to the Grantee yet, as it is not due.
- Submitted – Grantee submitted deliverable.
- Approved – HCAI staff have reviewed the deliverable and verified all information is correct and will mark it as approved and completed.
- Payment Processed – HCAI staff have reviewed the deliverable and verified all information is correct. If payment is associated with the deliverable, Program will mark the deliverable as “payment processed” once payment has been sent to accounting for processing. **(Payments take 4-6 weeks from this point to be processed and mailed.)**

The screenshot shows the OSHPD user interface. At the top, there is a navigation bar with "Profile", "Sign Out", and a user name "MICHAEL ANDRJIICH". Below this is a main menu with "Apply Here", "Applications - In Progress/Submitted", "Awards", "Payments/Deliverables", and "Messages". The "Payments/Deliverables" section is active, displaying a table of deliverables.

Listed below are the status of your deliverables. To receive payments, please submit progress reports and documents (deliverables) to OSHPD as defined in your grant agreement. Click on a grant number to submit a deliverable.

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GA20-BSNSP-1013008-EVF	GA20-BSNSP-1013008	2	Employment Verification	04/30/2021	In Progress	0.00	0.00	0.00	▼
GA20-BSNSP-1013008-PAYMENTPROGRESSREPORT 1	GA20-BSNSP-1013008	3	Progress Report	04/30/2021	In Progress	0.00	0.00	0.00	▼
GA20-BSNSP-1013008-PAYMENTPROGRESSREPORT 2	GA20-BSNSP-1013008	4	Progress Report		Upcoming	0.00	0.00	0.00	▼

At the bottom of the page, there is a footer with various links categorized into: Services, Data Submissions, CA Healthcare Infrastructure, Public Transparency, and About OSHPD.

Accessing Your Progress Report (cont.)

- The “Due Date” column will indicate the date the deliverable is due and must be uploaded by.
- The “Payment” column will indicate the amount of funds associated with the deliverable.

NOTE: Not all deliverables are associated with a payment and will indicate \$0.00.

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Profile Sign Out MICHAEL ANDRIJICH

Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Listed below are the status of your deliverables. To receive payments, please submit progress reports and documents (deliverables) to OSHPD as defined in your grant agreement. Click on a grant number to submit a deliverable.

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GA20-BSNSP-1013008-PAYMENT PROGRESS REPORT 1	GA20-BSNSP-1013008	3	Progress Report	04/30/2021	In Progress	0.00	0.00	0.00
GA20-BSNSP-1013008-PAYMENT PROGRESS REPORT 2	GA20-BSNSP-1013008	4	Progress Report		Upcoming	0.00	0.00	0.00

- Services
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 - Coronary Artery Bypass Graft Surgeries
 - Healthcare Financial Assistance Policies
 - Hospital Chargemasters
- CA Healthcare Infrastructure
 - All Facilities
 - Healthcare Facility Detail
 - Seismic Compliance and Safety
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 - Careers

Confirm Contact and Employer Information

- After clicking on the deliverable that is due, Grantee will follow the following steps:
 1. Review and confirm contact information is accurate.

NOTE: If contact information is not correct, Grantee must update their profile by clicking the “Profile” link and update their contact information accordingly.

2. Once contact information has been verified, Grantee will need to verify their employer.
- If employer is correct, Grantee will leave as is. If the Direct Patient Care Hours and/or Start/End Dates need to be edited, the Grantee will click on the “ ✓ ” next to the employer and select the option necessary for the changes needed.
 - If the Grantee no longer works at the employer listed, the Grantee will need to edit the Start/End dates to reflect they no longer work there and indicate the last day worked.
 - Grantee will then need to click on “Add New Employer” to add their current new employer.

NOTE: For any new employers, the Grantee must download and complete a new Employment Verification Form, which will have to be uploaded once completed. Grantee will not be able to complete a progress report for any new employers until HCAI staff determine the employer is eligible.

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Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Profile Sign Out MICHAEL ANDRICH

Grant #: GA20-LMH-1011513-1

Confirm Your Contact and Employer Information

Please review your contact information below. If the information is not current, please make changes in your Profile.

Name: Michael Andrich Email: mandrich@email.com Phone: (916) 555-4444

Address: 2020 W El Camino Ave Suite/Apt/Dept

Sacramento CA 95833

The table below shows your current employer(s).

PLEASE READ:
If your employer has changed, click on the Add New Employer button and enter the required information. Then, for your former employer, from the Options drop-down menu, select Edit and enter an end date.
For each current employer, click on the Options button and select Download Progress Report. You will be required to upload a signed progress report for each current employer before submitting your payment request.

In order to submit your progress report, you are required to enter the amount of direct patient hours specifically you are performing per week for each current employer.

Please note: If you submit a new Employment Verification Form (EVF) for a new work site, your EVF will need to be approved by Program staff. Once approved, you may then submit your progress report.

Add New Employer

Employer Name	I currently work here	Start Date	End Date	Direct Patient Care Hours Per Week	Total Hours Weekly Worked	New Employment History
Hope Clinic	Yes	10/12/2020		32		No

I have downloaded the Progress Report for each of the employers listed above.

Downloaded Progress Report

My contact information listed above is correct:
 I agree.

Save & Continue

Download Progress Report
Edit Direct Patient Care Hours
Edit Start/End Date

Download Progress Report

- Progress Reports will need to be downloaded and completed for each current employer only.
- To download the progress report, the Grantee will follow the following steps:
 1. Next to the current employer(s), the Grantee will click “ and select “Download Progress Report”.
 2. Grantee will need to save a PDF of the progress report to their computer.
 3. Grantee must then print the progress report out, complete the progress report, sign, and obtain their direct supervisor or appropriate designee’s signature verifying the hours and information is correct.
 4. Once all progress reports have been downloaded, the Grantee will select “Downloaded Progress Report” and select “I Agree” if all information is correct.
 5. Click “Save & Continue”

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Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Grant #: GA20-LMH-1011513-1

Confirm Your Contact and Employer Information

Please review your contact information below. If the information is not current, please make changes in your Profile.

Name	Email	Phone
Michael Andrich	mendrich@email.com	(916) 555-4444
Address	Suite/Apt/Dept	
2020 W El Camino Ave		
Sacramento	CA	95833

The table below shows your current employer(s).

PLEASE READ:
If your employer has changed, click on the Add New Employer button and enter the required information. Then, for your former employer, from the Options drop-down menu, select Edit and enter an end date.
For each current employer, click on the Options button and select Download Progress Report. You will be required to upload a signed progress report for each current employer before submitting your payment request.

In order to submit your progress report, you are required to enter the amount of direct patient hours specifically you are performing per week for each current employer.

Please note: If you submit a new Employment Verification Form (EVF) for a new work site, your EVF will need to be approved by Program staff. Once approved, you may then submit your progress report.

Add New Employer

Employer Name	I currently work here	Start Date	End Date	Direct Patient Care Hours Per Week	Total Hours Weekly Worked	New Employment History
Hope Clinic	Yes	10/12/2020		32		No

I have downloaded the Progress Report for each of the employers listed above.

Downloaded Progress Report

My contact information listed above is correct:


I agree.

Save & Continue

Click here to download progress report.

Questionnaire

- Grantees will have a two-page questionnaire to complete that will provide data on the Grantee and the patients they serve.
- This data is used to measure the impact and success of the program for future evaluation.
- Grantees will answer to the best of their knowledge.

 Profile Sign Out MICHAEL ANDRUSICH

Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Grant #: GA20-LMH-1011513-1

Tell Us About Yourself

1. During an average week, approximately how many hours do you work?*

2. During an average week, how many patients, clients or consumers do you provide direct patient care or service(s) to?*

3. During an average week, how many direct patient care hours or services (phone calls, group therapy, or direct interaction with clients) do you provide?*

4. During an average week, how many hours do you spend on the following areas (not providing direct patient care)?

4a. Administrative (travel, phone calls, reports, and other documentation requirements):*

4b. Research (analysis/ data entry):*

4c. Supervision (oversee/supervise interns, assistants, or trainees):*

4d. Management:*

5. In which categories do you provide patient/client care? (Select all that apply):*

- Anesthesia
- Geriatric care (including Alzheimer's disease)
- Oncology
- Anxiety / Adjustment Disorder
- General Internal Medicine
- Orthopedic
- Asthma
- General Practice
- Pediatrics
- Cardiology
- HIV / AIDS
- Post-Traumatic Stress Disorder (PTSD)
- Diabetes
- Kidney / Dialysis
- Psychosocial / Personality Disorder
- Drug or Alcohol Abuse
- Learning Disorders
- Rehabilitation
- Eating Disorder (including obesity)
- Mood Disorder/Depression
- Trauma / ER Services
- Family Practice
- Urology
- Gastroenterology
- OB / GYN

Employment Verification

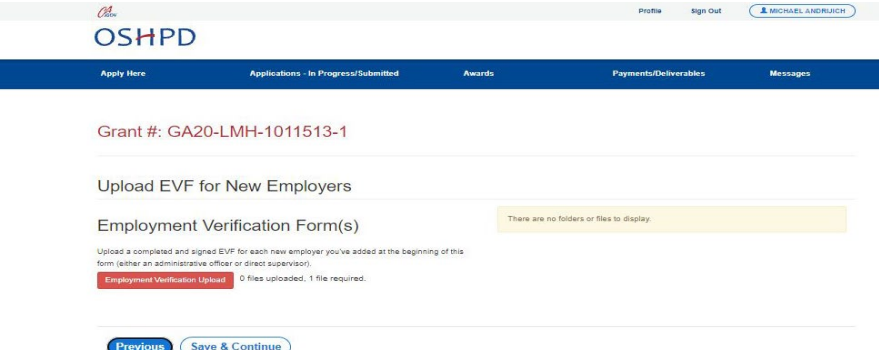
- If Grantee did not indicate they had a new employer when verifying their contact and employer information in the beginning, the “Employment Verification Upload” button will be green.
- Grantees can click “Save & Continue”.

NOTE: If the upload button is green (see Figure 3.2), then no Employment Verification Form is required.

- If Grantee added a new employer in the beginning when verifying contact and employer information, then the “Employment Verification Upload” button will be red (see Figure 3.1).
- Before Grantee can proceed, they will have to upload a completed and signed Employment Verification Form here.
- Grantee will click “Save & Continue”.

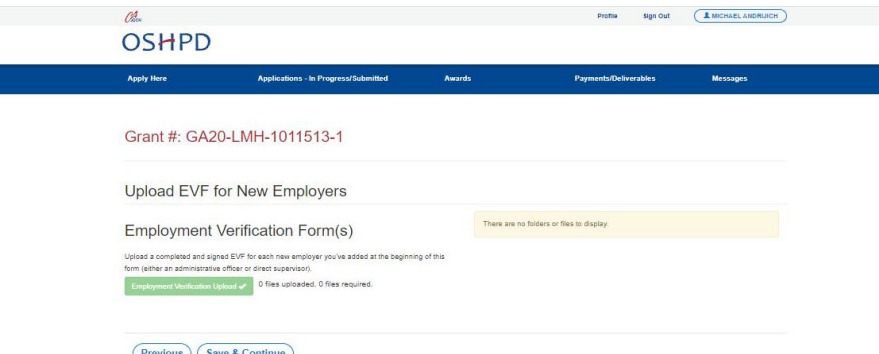
NOTE: The upload button will turn green (see Figure 3.2) once Grantee upload their Employment Verification Form.

Figure 3.1



The screenshot shows the OSHPD portal interface. At the top, there is a navigation bar with the OSHPD logo and user information (Profile, Sign Out, MICHAEL ANDRUCH). Below this is a dark blue navigation menu with links for 'Apply Here', 'Applications - In Progress/Submitted', 'Awards', 'Payments/Deliverables', and 'Messages'. The main content area displays 'Grant #: GA20-LMH-1011513-1' and 'Upload EVF for New Employers'. Underneath, it says 'Employment Verification Form(s)' and 'There are no folders or files to display.' Below this, there is a red button labeled 'Employment Verification Upload' and the text '0 files uploaded. 1 file required.' At the bottom, there are two buttons: 'Previous' and 'Save & Continue'.

Figure 3.2



The screenshot shows the OSHPD portal interface, similar to Figure 3.1. The navigation bar and menu are the same. The main content area displays 'Grant #: GA20-LMH-1011513-1' and 'Upload EVF for New Employers'. Underneath, it says 'Employment Verification Form(s)' and 'There are no folders or files to display.' Below this, there is a green button labeled 'Employment Verification Upload' and the text '0 files uploaded. 0 files required.' At the bottom, there are two buttons: 'Previous' and 'Save & Continue'.

Progress Report Upload

- Grantee will upload completed progress report at the end on the “Progress Report Upload” page.
- The “Progress Report Upload” button will remain red until the required progress report(s) are uploaded (see Figure 4.1).

NOTE: If Grantee uploaded a new Employment Verification Form for a new employer, HCAI staff will have to approve the EVF. Once approved, Grantee must navigate back to the “Contact and Employer Information” page and download the progress report for the new employer.

- If Grantee has more than one progress report to upload, they must name the files with different from one another while ensuring the following prefix is included “ProgRep_”.

For example, “ProgRep_Employer Name 1” and “ProgRep_Employer Name 2”.

- Once all required progress reports are uploaded, the “Progress Report Upload” button will turn green (see Figure 4.2).
- Grantee can then click “Submit”. This will submit their progress reports for review.

Figure 4.1

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Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Grant #: GA20-LMH-1011513-1

Progress Report Upload

Please note: Your Employment Verification Form (EVF) will need to be approved by Program staff. Once approved, you may then submit your progress report.

EVF Approved? *

Yes

Name	Modified
EVF_Test.docx (17 KB)	10/18/2021 4:10 PM

Progress Report

Upload your signed progress report(s). To download and print out a progress report for your employer to sign, return to the Confirm Your Contact and Employer Information section.

Progress Report Upload 0 files uploaded, 2 files required.

Previous Submit

Figure 4.2

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Apply Here Applications - In Progress/Submitted Awards Payments/Deliverables Messages

Grant #: GA20-LMH-1011513-1

Progress Report Upload

Please note: Your Employment Verification Form (EVF) will need to be approved by Program staff. Once approved, you may then submit your progress report.

EVF Approved? *

Yes

Name	Modified
EVF_Test.docx (17 KB)	10/18/2021 4:10 PM
ProgRep_1.docx (17 KB)	10/18/2021 4:12 PM
ProgRep_2.docx (17 KB)	10/18/2021 4:13 PM

Progress Report

Upload your signed progress report(s). To download and print out a progress report for your employer to sign, return to the Confirm Your Contact and Employer Information section.

Progress Report Upload 2 files uploaded, 2 files required.

Previous Submit