



FLORIDA ASSOCIATION OF
FREE & CHARITABLE
CLINICS

Reporting Guidance: Third Grant Narrative

June 25, 2024

Agenda

1. Navigation

- a. Salesforce Overview
- b. Changes and Updates
- c. Patient Services Report

2. Best Practices

- a. Grant Narrative Scoring
- b. Recording Outcomes
- c. Tips for Reporting
- d. Deadlines

3. Questions

What's Included?

Grantees will be asked to report on the following from April 1st to June 30th

```
graph TD; A[Expenses] --> B[Implementation Steps]; B --> C[Outcomes]; C --> D[Strengths & Barriers to Success];
```

Expenses

Implementation Steps

Outcomes

Strengths & Barriers to Success



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Navigation: Login

- Use your clinic's existing account to access your report
- If you do not have access, contact kendall@fafcc.org



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Username



Password

Log in

[Forgot your password?](#)

[Are you an employee? Login here](#)

Navigation: Narrative Reports

- “My Request” shows your Awarded grants
- Select the grant where you wish to complete the narrative

The screenshot displays a web application interface with a navigation menu at the top. The menu items are "Grant", "My Request", "Disbursements", "Fees and Eligibility", "Events", and "Strategies". The "My Request" item is highlighted with a red box. Below the menu, there are two grant cards. Each card has a red "Awarded" label at the top. The left card is for "The Way Free Medical Clinic, Inc. 2023" under the "23-24 State Funds Grant Program" and has a teal "View" button highlighted with a red box. The right card is for "The Way Free Medical Clinic, Inc. 2023" under the "23-24 Dental and Behavioral Health Expansion Grant Program" and also has a teal "View" button highlighted with a red box.

Grant **My Request** Disbursements Fees and Eligibility Events Strategies

Awarded

The Way Free Medical Clinic, Inc.
2023

23-24 State Funds Grant Program

View

Awarded

The Way Free Medical Clinic, Inc.
2023

23-24 Dental and Behavioral Health Expansion Grant
Program

View

Navigation: Narrative Reports

- Click on “Narrative Report”
- Select the third narrative, which will show an “Open” status
- Look for status change to “Complete” to ensure submission

Details Uploaded Files **Narrative Report** Disbursements Expenses Assistance

 Narratives (3)

Narrative	Name	Requirement Link	Status
The Way Free Medical Clinic, Inc. 2023 - Narrative 1	Narrative - 0 (7/1/2023-12/31/2023)	Complete Here	Complete
The Way Free Medical Clinic, Inc. 2023 - Narrative 2	Narrative - 0 (1/1/2024-3/31/2024)	Complete Here	Open
The Way Free Medical Clinic, Inc. 2023 - Narrative 3	Narrative - 0 (4/1/2024-6/30/2024)	Complete Here	Open

Navigation:

Saving and Submitting

Complete narrative fields outside of Salesforce and copy/paste

Save frequently during completion and before exiting

Type name to sign, submit when narrative is fully complete

Signature

* I, the Project Liaison, hereby certify that all of the information contained in this progress report is true and accurate to the best of my knowledge by typing my name below.

test

Save

Previous

Next

Narrative

Expenses

Request Help

Before clicking submit please review your grant narrative report to confirm all recorded expenses, calculations, and progress is accurate and ready for submission

Previous

SUBMIT

Navigation: Expenses

- Narrative will include reporting areas based on your awarded categories
- Add expenses to each expense table as separate line items
- Check for a zero balance

The screenshot displays a web interface for managing expenses. At the top, there is a teal button labeled "Add Personnel Expense" which is highlighted with a red rectangular box. Below this button, a message reads "To update an expense table, please click on the Expense Tab". A table with the following columns is shown: "Date Expensed", "Line Item Descri...", "Designation Areas", "Service Type", "Amount Spent by...", and "Amount Requested From ...". The table contains one row with the following data: "1", "Jun 19, 2024", "Medical Director ...", "Planning Org Assessment or Othe...", "Health Services", "\$1,550.00", and "\$0". Below the table, another message reads "To update an expense table, please click on the Expense Tab". A red arrow points to the following summary section:

Total Expenses for Third Reporting Period
\$1,550.00

Total Expenses for Second Reporting Period
\$0.00

Total Expenses for First Reporting Period
\$10,000.00

Remaining Balance
\$45,450.00

A second red arrow points to the "Remaining Balance" line item.

Navigation: Expenses

- Enter \$125 for CMR Licensing
- Conference Award amount must be expensed during this reporting period

CMR Licensing Award

An Invoice was generated by FAFCC in October

125

Please provide the amount of the paid invoice as of June 30th

\$0

FAFCC Conference Award

Conference Registration Total

Amount Expensed on Conference Award

Please note that conference fees MUST be expensed at this time.

700

Navigation: Expenses

- Expenditure documentation within Salesforce
- Invoices, paystubs, receipts, purchase orders, Quickbooks export (*PDF format preferred*)
- Click "Save" to see documents list

The screenshot displays the Salesforce Expenditure Documentation interface. At the top, there is a section titled "Expenditure Documentation" with an "Upload Files" button (highlighted with a red box) and the text "Or drop files". Below this, it shows "Showing 1 of 1 item • 1 item selected". A table lists the document with a checked checkbox (highlighted with a red box) and the title "2023-24 Notice of Funding Availa...". An "Upload Files" modal window is open in the center, showing the file "2023-24 Notice of Funding Availa..." (6.9 MB) with a progress bar and a checkmark icon (highlighted with a red box). Below the modal, it says "1 of 1 file uploaded" and has a "Done" button (highlighted with a red box). To the right of the document list, there is a "Delete Document" button (highlighted with a red box). At the bottom of the page, there is a "Save" button (highlighted with a red box).

Locating Reporting Materials

- All links can be found on the website
- Including PDF of Patient Services Report



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Best Practices: Grant Narrative Scoring

Exceeds Expectations

1. Expenses are listed to the penny, are detailed, and can be compared against attached expenditures
2. Measurable outcomes are provided and demonstrate progress to goals outlined in the proposal
3. Report is detailed, written in a narrative format, and includes detail on project implementation

Meets Expectations

1. Expenses are listed, but labeling is broad (i.e. medical supplies, provider salary)
2. Outcomes provided but may not include a measurable component or outputs are provided instead
3. Report had some detail in certain fields while missing in others

Sufficient

1. Expenses listed are either incomplete or missing despite there being expended funds
2. No attempt made to provide outcomes, or overly vague (i.e goal is to keep program running)
3. Little to no detail in overall report

Best Practices: Demonstrating Progress

Outputs

1. Are contributions necessary to enable the program to be implemented
2. Are activities that indicate whether the program/project is being implemented as planned
3. Include in implementation steps field

VS

Outcomes

1. Detail progress made toward intended outcomes and goals outlined in the original proposal
2. Measure whether the program or project is achieving the expected effects/changes in the short, intermediate, and long term
3. Should incorporate a balance of both quantitative & qualitative markers
4. Include in outcome field

Best Practices: Outcomes Explored

Example: If your goal is to improve health outcomes, this could be demonstrated through measurable indicators such as

- Primary care home for clients (% of new clients)
- Improvements in appointment scheduling and no-show reductions (% of increased patient compliance)
- Changes in lifestyle to manage chronic diseases (% of patients who have reported increase exercise, healthy eating, or improved BMI)
- ER diversion (% of clients who reported no new trips to the ER)

Best Practices: Outcomes Explored

Examples of outcomes related to operational or personnel expenses

- Efficiency gains and quality improvement initiatives (i.e. reduction in wait times, enhanced patient satisfaction)
- Continuity of service, risk management, and long-term sustainability
- Qualitative evidence of patient care outcomes
- Expansion of services or increased access

Reporting Deadlines



- ▶ Third Grant Narrative
 - **Monday, July 15th**
- ▶ Patient Services Report
 - **Monday, July 15th**
- ▶ *Staff will be available until close of business (5 pm EST)*
- ▶ Annual Valuation Report
 - **TBD**

Compliance Policy

- FAFCC must enforce deadlines in order to meet deliverables established by the Department of Health.
- Grantees will receive a 24-hour grace period.
- FAFCC will assist Grantees with outstanding deliverables before additional action is taken.
- Action may include the following:
 - Written notice attached to grantees performance, which may affect participation in future cycles
 - A request for a monitoring call
 - A hold on future disbursements

Questions

