

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

- 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

Expenses

Implementation Steps

Outcomes

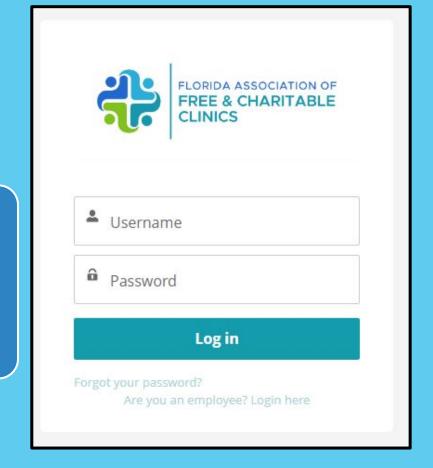
Strengths & Barriers to Success



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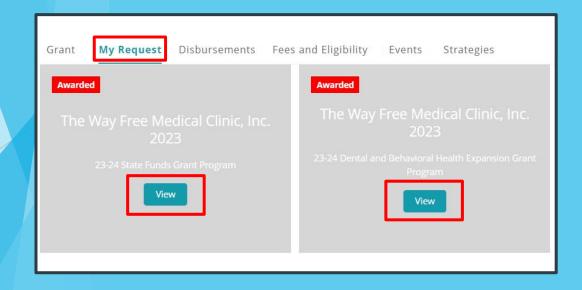
Navigation: Login

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



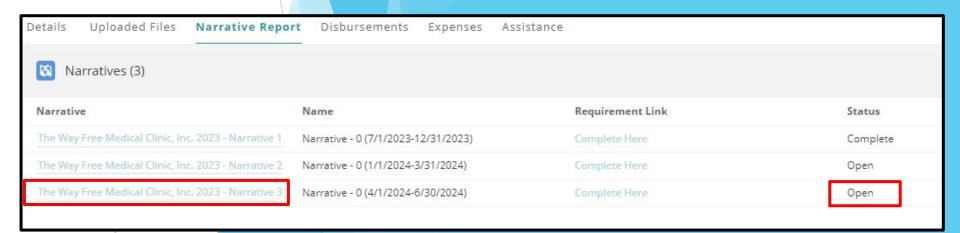
Navigation: Narrative Reports

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



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



Navigation:

Saving and Submitting

Complete narrative fields outside of Salesforce and copy/paste

Save frequently during completion and before exiting

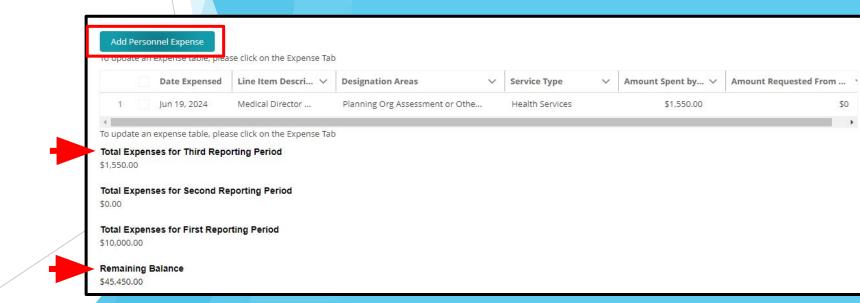
Type name to sign, submit when narrative is fully complete



Narrative	Expenses	Request He	lp	
report	to confirm al	l recorded ex	eview your gran penses, calculated	ations, and
			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



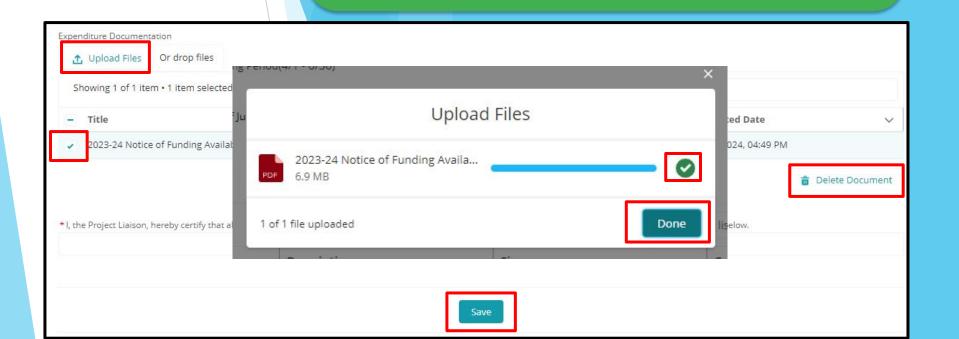
Navigation: Expenses

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



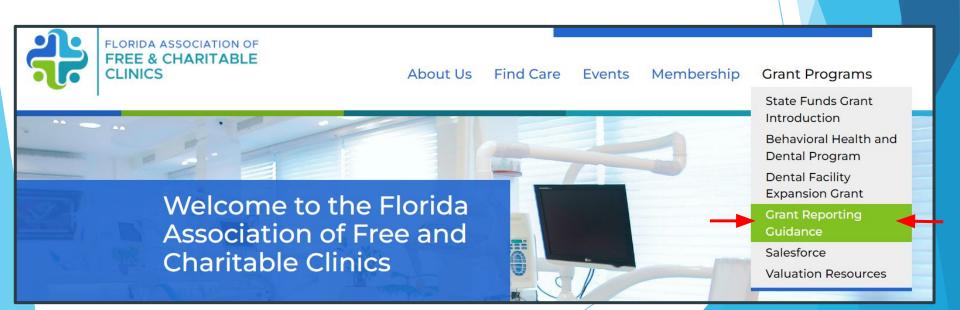
Navigation: Expenses

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



Locating Reporting Materials

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



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

- 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
- 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
 - \circ 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

