

# QHIO Onboarding Grants Milestone Information Session

11/28/2023

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# Welcome!

## Who is Public Consulting Group (PCG)?

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

Contracted with the CDII DxF, PCG is **the third-party administrator (TPA) for the DSA Signatory Grant program.**

## PCG

- Manages DxF Grant Portal
- Supports application submission
- Reviews applications
- Notifies award decisions
- Fund disbursement
- Manage receipt of progress report & milestone attestations



# Selecting Your QHIO

# Timeframe to Select a QHIO

- Grantees can select a QHIO at any point between application submission and one year after CDII announced the QHIOs (R1, R2) or award date (R3)
  - R1 and R2 deadline to select a QHIO is Wednesday, October 23, 2024
  - R3 Grantees will have up to one year from award notification. Awards are estimated to be announced January 2024, therefore anticipated deadline to select a QHIO would be January 2025
- The Grantee must designate and work with a single QHIO using grant funds. After attesting to Milestone 1, the Grantee cannot
  - Switch to a different QHIO for the purposes of achieving Milestone 2
  - Change their grant to the TA Grant



# Selecting Your QHIO

- Those Grantees that did not select a QHIO in their application **must notify CAHIE** once they have chosen their QHIO
  - CAHIE staff will then add the QHIO's designee to the Grantee's application on the GrantsConnect application portal
- These QHIO will have the ability (and responsibility) to submit Progress Reports through the GrantsConnect portal, on behalf of the Grantee
  - Grantees will have the option to review and confirm uploaded information
- Contact CAHIE to let them know the QHIO you have chosen
  - CAHIE will need your application number
  - The email address associated with your awarded application



# Progress Reports

# Progress Reports - Overview

- Progress Reports will keep CDII informed on the status of grant awards
- If a Grantee has satisfied a **milestone**, the Progress Report will indicate this
- If a Grantee has not yet (within a calendar quarter) met a milestone, the Progress Report will indicate this
- See next slides for details on how to find things such as
  - Who submits a Progress Report
  - Where to find a Progress Report
  - What is reported in Progress Report





# Who is responsible for filling out and submitting progress reports?

If the Grantee has yet to select your QHIO of choice, Grantees are responsible for completing Progress Reports:

- 2024 through 2026 Progress Reports are mandatory, at least four times a year, until your grant funds are expended (until you have submitted for both Milestone 1 and Milestone 2).

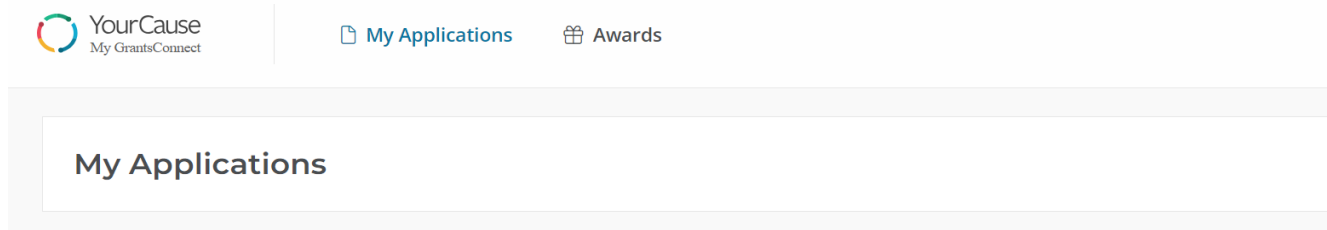
Once a Grantee selects their chosen QHIO, that QHIO will be required to take on all grant-related administrative tasks, including the provision of ongoing Progress Reports, for the duration of the grant.


See the next slide for guidance on selecting your QHIO and how reporting happens once your QHIO has been selected.



# Where do I and my QHIO find my Progress Reports?

- To access the 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 QHIO Onboarding Data Sharing Agreement Signatory Grant Application



 Application ID: 889822	Data Sharing Agreement Signatory Grant Application <span style="float: right;">● In progress</span> Jessica Decker
	Data Sharing Agreement Signatory Grant Application <span style="float: right;">🕒 Submitted on May 16, 2023</span> <a href="#">DxF Progress Report 1 QHIO Onboarding</a>
	<a href="#">Manage application</a>



# Where do I find the Progress Report? *Continued...*

- Click on the Application Forms link
  - “DxF Progress Report 1 QHIO”

The screenshot shows a web interface for 'DxF Progress Report 1 QHIO Onboarding'. On the left, there is a sidebar with the 'DATA EXCHANGE FRAMEWORK CALIFORNIA HEALTH & HUMAN SERVICES' logo, an 'Instructions' section, and an 'Application Forms' section with a 'Saved' status. The main content area is titled 'DxF Progress Report 1 QHIO Onboarding' and includes an 'Applicant Information' section for Jessica Decker, a 'FORM QUESTIONS' section with a 'Download' button, and a form with fields for 'Organization Name' (containing 'Test org'), 'Progress Report Submitter\*', and 'Contact Number\*'. A 'Manage applicants (1)' link is also visible.



# What needs to be included in the Progress Report?

Organization Name	[auto-populated]
<b>Selected QHIO</b>	[auto-populated]
<b>Progress Report Submitter</b>	
<b>Contact Number of Submitter</b>	
<b>Contact Email of Submitter</b>	
Award Notification Date	[auto-populated]
Milestone 1 Due By	[auto-populated]
Milestone 2 Due By	[auto-populated]

For Round 1 and Round 2 Grantees:

Grantees have 12 months from the date CDII announced the QHIOs (10/23/23) to reach Milestone 1 (10/23/24), and 24 months from the time of their award to reach Milestone 2 (10/23/25).

Round 3 Grantees will have 12 months from Award notification for Milestone 1; 24 mo for Milestone 2

Grantees that do not achieve Milestones in these timeframes may forfeit their grant award. Until Milestone 2 is achieved, Grants will need to submit Progress Reports each quarter, beginning in 2024;

*Refer to the DSA Signatory Grants Applicant Guidance Document for further details.*



# What needs to be included in the Progress Report? Continued

## Prior to or upon meeting Milestone 1

### 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 (see next slide)  
Submit with your Progress Report:
  - A signed attestation from all Grantee signatories on the application and the selected QHIO that states they have entered or amended a contract covering the services outlined in the application.
    - *PCG or CDII may request a copy of the signed contract*
  
- 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.

Note that both the QHIO and Grantee must sign the M1 attestation. And the Grantee signer must be the same person who signed the DSA.



# Milestone 1 Requirements

The following is presented from the Grant Guidance Document, p. 36

## Milestone 1 Definition

*Grantee has signed a contract with a QHIO for all the Signatories included in the Grant. Grantee may develop multiple contracts for Signatories in the Grant, but they must all be with the same QHIO, and they must cover all Signatories in the Application to reach Milestones 1.*

## How to demonstrate this Milestone

*Through the Progress Report section of the DxF Grant Portal, the selected QHIO for a Grant will submit a signed attestation that they have signed a contract(s) or contract amendment(s), (or the equivalent thereof) covering all Signatories included in the Grant. Attestation will be co-signed by the Grantee. Grantees may be required to provide a copy of the signed contract(s) upon request of PCG and CDII.*


R1 and R2 Grantees will have 12 months from the date CDII announced QHIOs to reach Milestone 1.



# Milestone 1 Completion Attestation

## INSTRUCTIONS:

The selected QHIO for a Grant will submit a signed attestation that they have signed a contract(s) or contract amendment(s) covering all Signatories included in the Grant. Attestation will be co-signed by the Grantee.



Click or drop files here to upload  
Max File Size: 29MB

[View accepted file types](#)



DSA Signatory Grants

**QHIO Onboarding Grant Milestone One  
Attestation Form**

**This documentation serves as the attestation between the Grantee and its selected QHIO regarding the QHIO Onboarding Grant details below.**

### Attestations and Certifications

The authorized representatives of the QHIO Onboarding Grantee and the QHIO selected by that Grantee attest to the following:

The QHIO Onboarding Grantee listed below has contracted with the QHIO listed below to onboard all Signatories included in the QHIO Onboarding Grant to this QHIO's platform. This contract is expected to establish data exchange in accordance with the California Data Exchange Framework, and is either:

- a. A contract established no earlier than January 1, 2023; or
- b. An amendment to a contract established prior to January 1, 2023 and is specific to the DxF.

The QHIO Onboarding Grantee has assigned their QHIO Onboarding Grant to this QHIO, and the QHIO has agreed to receive and manage the funds to support onboarding of this Grantee to their QHIO.

QHIO	Grantee
QHIO Name: _____	Grantee Organization Name: _____



# After Milestone 1, what needs to be included in the Progress Report?

## Prior to or upon meeting Milestone 2

### Milestone 2

- If you are not yet ready to demonstrate Milestone 2:
  - Work with your selected QHIO to provide a brief narrative regarding your progress towards achieving Milestone 2.
  
- If you are ready to demonstrate Milestone 2 (see next slide)  
Submit with this Progress Report:
  - An attestation signed by both the QHIO and Grantee stating that onboarding has been completed for all Signatories in the Grant; and
  - Documents demonstrating that the completion of a real-time data exchange transaction for each Instance included in the Grant, in a production environment.
  
- 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.

Note that both the QHIO and Grantee must sign the M2 attestation. And the Grantee signer must be the same person who signed the DSA.





# Continued...

## Milestone 2 Requirements

The following is presented from the Grant Guidance Document, p36-37

### Milestone 2 Definition

*The QHIO has successfully onboarded all Signatories in the Grant and completed a real-time data exchange transaction.*

### How to demonstrate this Milestone

*Through the Progress Report section of the DxF Grant Portal, the QHIO will submit the following two documents:*

*An attestation signed by both the QHIO and Grantee stating that onboarding has been completed for all Signatories in the Grant; and*

- Document(s) – such as a screenshot, data output, or signed attestation by the Grantee (or Signatories included in the Grant) and the QHIO – demonstrating that the completion of a real-time data exchange transaction for each Instance included in the Grant, in a production (i.e., non-test) environment.*

R1 and R2 Grantees will have 24 months from October 23, 2023, the date that CDII announced QHIOs to reach Milestone 2.



# Milestone 2 Completion Attestation

## INSTRUCTIONS:

Submit the following two artifacts with this Progress Report.

An attestation signed by both the QHIO and Grantee stating that onboarding has been completed for all Signatories listed in the Grant Application; and

Document(s) – such as a screenshot, test output, or signed attestation by the Grantee (or Signatories included in the Grant) and the QHIO – demonstrating that the completion of a real-time data exchange transaction for each Instance included in the Grant, in a production (i.e., non-test) environment; refer to the DSA Signatory Grants Applicant

Guidance Document for further details.



Click or drop files here to upload  
Max File Size: 29MB

[View accepted file types](#)

# **Timelines - Progress Report Due Dates and Payment of 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 within 30 days of PR submission
2024	March 29, 2024	April 28, 2024
2024	June 30, 2024	July 30, 2024
2024	September 30, 2024	October 30, 2024
2024	December 31, 2024	January 30, 2025
2025	March 31, 2025	April 30, 2025
2025	June 30, 2025	July 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 sent to [DSAGrants@pcgus.com](mailto:DSAGrants@pcgus.com)
  - Questions on your application or adding a QHIO designee can be sent to [grantsupport@cahie.org](mailto:grantsupport@cahie.org)
  - Questions on the DSA Grants program generally can be provided to [cdii@chhs.ca.gov](mailto:cdii@chhs.ca.gov)
- [DSA Signatory Grants Guidance Document](#)
- [DxF-DSA Landing Page](#)



# Questions?



# **Bank Information – for QHIOs (not Grantees)**

# What banking information does PCG need?

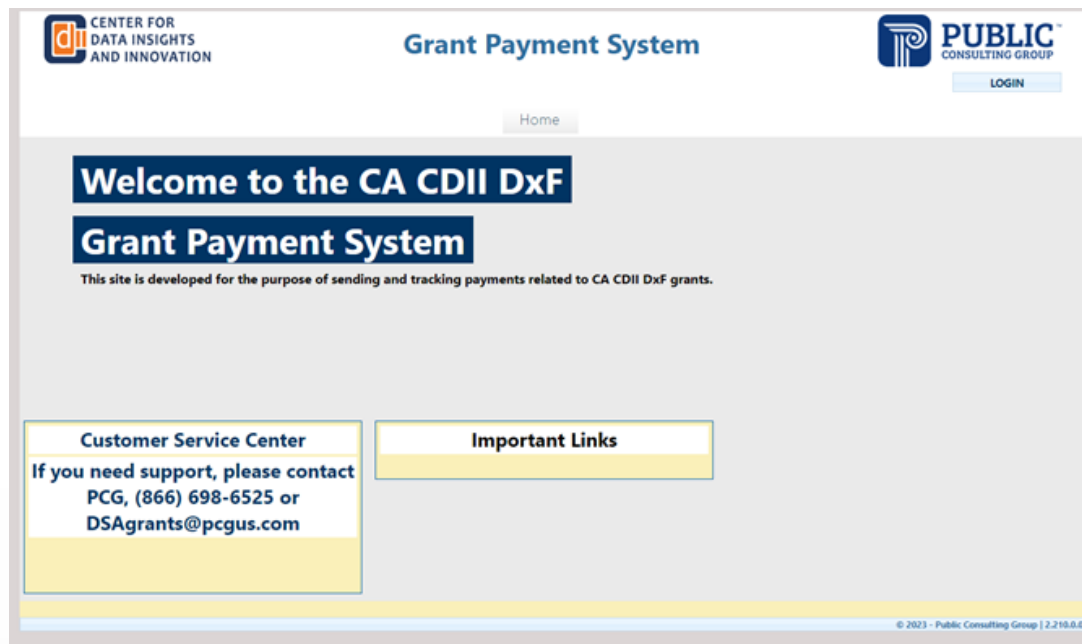
- All banking and grant fund management done under the QHIO Onboarding Grant domain is handled by PCG as CDII's TPA
  - Tip: Grantees may consider including an agreement on how grant funds will be used in the contracting process with their selected QHIO to ensure funds are optimally used to address the Grantee's needs.
- **Individual QHIO Onboarding Grantees do not need to provide PCG with any banking information.**
- QHIOs selected in one or more QHIO Onboarding Grant will provide bank information to PCG to receive and manage grant payments.





# How do QHIOs get their banking info to PCG?


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




# How do QHIOs get their banking info to the TPA?

- **Step 1:** Locate email from [HUSData@pcgus.com](mailto: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 QHIOs get their 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**

Business Name: \_\_\_\_\_ Business Website: \_\_\_\_\_ Doing Business As (DBA): \_\_\_\_\_  
Org 1: \_\_\_\_\_  
First Name: Juliette Middle Initial: \_\_\_\_\_ Last Name: Mullin  
ACH: \_\_\_\_\_  
FEIN/Federal ID: \_\_\_\_\_

**Address**

Address 1: 123 Main Street Address 2: \_\_\_\_\_  
City: Los Angeles State: California Zip: 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

**Grant Payment System**

CENTER FOR DATA INSIGHTS AND INNOVATION PUBLIC CONSULTING GROUP

Vendor Super User

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: \_\_\_\_\_ DOLLARS: \_\_\_\_\_  
MEMO: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_  
ROUTING NUMBER: 286582805 ACCOUNT NUMBER: 0123456789 0101

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