

QUARTERLY PROGRESS REPORT (QPR) TRANSCRIPT

Moderator: Matt Kozar

September 21, 2011

12:30 pm CT

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode. During the Q&A session you may press star 1 on your touch-tone phone if you would like to ask a question.

Today's conference is being recorded. If you have any objections you may disconnect at this time. Now I would like to turn the meeting over to Mr. Matt Kozar. You may begin.

Matt Kozar: Thank you. Thank you everyone for joining us on this call today. The purpose of the call is to outline for you the quarterly progress report module that will go live October 1, in which you will now provide your quarterly status updates into the electronic handbook for us to assess the progress that you're making with respect to your capital-related projects.

The capital related projects or grants that we utilize as modules will be the capital related grants that were awarded in fiscal year 2011, also known as the CD grantees as well as the school-based health center grants that were awarded this past summer.

The specific purpose of the call today is just to give you a high-level overview of the quarterly progress report module and we will refer to that as the QPR and to also give you some resources that will be helpful for you to evaluate before submitting the quarterly progress report.

The quarterly progress report as I mentioned will go live on October 1, and the reports will be due on October 14. That's if you received capital development funding or school-based health center funding, the due dates are the same for both.

This is also just a reminder that the quarterly progress reporting is a requirement as was indicated in your notice of grant award that you received with your particular award. In the case of the capital development grants we've been receiving your quarterly progress reports for the last few quarters and this is now the transition to the official structured data format so that we can assess the ongoing status of your projects.

Ultimately, with this is for our friends at health centers that have been utilizing the health center quarterly reporting, it's essentially the same framework that's being used within that health center clear reporting module. It's catered a little bit to the fact that this funding is not due to the recovery act therefore there aren't as many requirements to report on. And we'll give you a quick overview and a sense of what the differences are.

For the most part it's essentially the same as what those of you who have already reported through that module. You'll see mostly similarities to that. And as I mentioned it's basically our main mechanism to track the status of all your projects that you were awarded funding for whether it was capital development or school-based. But it's also a chance for you to document and demonstrate the progress that you're making with respect to your projects so that we can have a good evaluation of your progress and the successes that you've had with the funding that we've provided to you.

Ultimately, for those not familiar with HCQR, the quarterly reporting module consists of a few different forms. The forms are filled out in a workflow methodology that basically is tied to the status of your particular project. So each time you get into your quarter progress report you'll be asked to fill out a status update for your specific project.

Depending on that status, whether it's complete or not, you'll then be asked to provide additional information. And the system will drive you to provide that information which is appropriate based on your status that you're indicating at that particular time. A little bit later in the presentation, Rod Dunlap, my colleague in the Capital Development Branch in the Bureau Of Primary Health Care will give you some highlights of the specific forms.

Just a reminder for those of you who are not already familiar, that the quarterly progress reporting requirement is required until all of your projects are listed as being complete.

So you aren't exempt from reporting if just one of your projects is complete. You have to continue to report until all of your projects are complete and at that particular point in time the workflow of the system then has you fill out a final progress report that essentially has you finalize your grant.

Lastly, I just want to mention that there are resources available to you to reference and essentially there are resources that (Rod) and I will be speaking from today. The one is the quarterly progress report manual. That's a very detailed breakdown of the forms that are in the quarterly progress report and expectations of the data that you provided into the report.

There's also a quick reference sheet which is a very high-level overview of how you navigate through the quarterly progress report system. It also gives you some highlights of the specific forms but it's meant just to be a guide or reminder each time you get into the quarterly progress report on what you need to do to navigate the system and what data you need to provide.

You can find both of those resources, if you haven't already done so, at our capital development Web site. The Web site is <http://bphc.hrsa.gov/policiesregulations/capital/>. You should have received that reference to the Web site in the email reminders that we've been sending out over the last couple weeks.

But if not please take a moment now to go to the Web site, pull down the manual, pull down the quick reference sheet and sort of follow along with (Rod) and myself go through some of the information regarding the forms.

And with that I'm going to turn it over to (Rod) to give you an overview of the forms within the quarterly progress report.

(Rod Dunlap): Okay, it's (Rod Dunlap) here and I've been working with Matt a little bit on putting together the process that we're going to use in order to capture the quarterly data associated with the projects, the capital development as well as the school-based projects.

What I'd like to do is for the balance of my time is just walk you through the process that we're using. A lot of what I'm going to talk to here is outlined in the quick reference guide that Matt just brought to your attention. My comments will be fairly brief. The walk-through that I give you will be fairly brief but you'll find a little bit more detailed information in that quick

reference guide, which I think is a pretty handy guide to actually implementing the quarterly reporting process that we've adopted.

But I'll start off by just mentioning that the quarterly progress reports, the process is done through the EHB system from the grants home page under the grants portfolio. You're just going to click on "View Portfolio Link" and for both the capital development as well as the school-based grants from there you'll just click open the grant handbook link in order to see more detail associated with your respective capital development grant and/or your school-based grant.

On the left side of the page under submissions from that point you will click on the progress report link which you will, on October 1, be able to see. The progress report page opens and to begin the progress report editing process you are just going to click on "Edit Report" link. And that will allow you to actually start entering data associated with your progress report, your quarterly progress report.

After you click on that "Edit Report" link on the left-hand side of the screen, you will then click on the "Process Information" link. This will open a screen showing all of the top level information associated with your respective grant as well as other relevant links associated with your grant; that being the grant application, any previous quarterly reports that you might have done, all the related NGA's associated with the grant as well as relevant documents to the quarterly reporting process. Now that will include links to both the reporting manual that Matt just gave you the Web site to pull down from so you'll have a handy way of pulling that manual up in front of you while you are going through the process as well as the quick reference guide.

So from that point you'll move on to the next page and proceed clicking on the proceed to status overview button which will be on the left-hand side of your screen. From here the status overview page will open and will show the status of each of the forms associated with the quarterly report. There are four primary forms. The first is your cover page; Page 1, as it's labeled.

The second is a project data page, Page 3. The next is the earned value management page, page 3A and that's the page that actually may or may not open for you based on the grant that you have as well as the award amount associated with that grant. We will talk about that a little later.

And the fourth relevant page associated with the quarterly report is the close-out project data page which is Page Number 4. And just be aware that all these forms must show a status of complete before the report can be submitted to HRSA. So before you submit, you just want to make sure you go back in and all the pages indicate complete before you submit.

Before attempting to complete all the relevant forms I just talked about, please start by filling in your contact information page which is found under the cover page heading on the left-hand side of your screen at that point. And this is just the contact information on the individual that will be entering the data. After completing that contact information answer questions on Page 1, which is a summary page as to whether this project is the final report for the project.

If the project is not complete, at that point you will just click "no." If it is complete you click "yes" and it will take you to the next relevant screen associated with a completed project.

So you will either click "yes" or "no" on that summary page, Page 1. And it will, based on your answer, take you to the next page which is Page 3, which at this point gives you the opportunity to indicate the status of the project. You will have four primary status selections; one being "Not started," the second one being "Started but less than 50%," the third being "Started, greater than 50% but not complete" and the last one being "Completed project."

Here you will select one of the status options as well as you will enter a narrative associated with where the project is at that point and any descriptions associated and relevant information that would need to be communicated associated with that status.

Now after completing page number three, just be aware for construction and renovation projects that were funded under the capital development program with a total project cost of greater than \$1 million or greater you are required to report on earned value management EVM within the quarterly progress report. This information is entered on page 3A. On that page if it is deemed to be relevant to your particular project you will choose the appropriate answer for both the project schedule as well as the project budget.

After entering the information associated with both the schedule and the budget you will just click on "Save and continue" which will take you to the next page. And finally in the progress report, the progress report is marked complete on Page 3. That means that if on Page 3 you report your project as being complete you will have to complete the last page, Page 4, which is the closeout page. And here you're entering closeout data associated with your project.

After completing Page 4, if it's relevant, you click on the "Save and continue."
When you have completed entering all the appropriate progress reporting data you hit "Continue" at the end of the process and you will have the opportunity to review and then submit the final data and information that you've entered into the system.

So that's just a very brief walk-through in terms of the process that you will undertake in the EHB to complete the quarterly reporting module. And with that I will turn it back over to Matt.

Matt Kozar: Yes and thanks, (Rod). I just wanted to highlight a couple of additional things before we take questions from you. With respect to the Form 3, which is essentially your ongoing project status report where you indicate the status as well as provide a detailed explanation of where you're at in the project. I do want to stress that if you can provide as much detail as possible in there it helps us to get a clearer picture of where you're at with your project.

And to the extent that you can, you also have the ability to provide attachments in that particular section. So if you have a project that is in the process of being implemented, photos of that status will be greatly appreciated.

Ultimately, if we deem the quarterly progress report that is submitted to not have sufficient information for us to be able to gauge where you're at with your project, we do have the ability to send that back to you for further information after the due date has passed. We just want to stress now that our purpose is not to send back so to the extent that you can provide the

information up front it makes the process go a lot smoother for everyone involved.

And then lastly, if you have any questions there's two resources that you should utilize when completing your quarterly progress report. If you have any technical issues navigating the system, accessing HB, the first point of contact for you should be the Bureau of Primary Health Care Help line. They can be reached at bphchelp@hrsa.gov or their phone number is 877-974-2742. If you have any questions regarding the specific data that you're asked to provide into the quarterly progress report or if you have a question regarding the detail you're anticipated providing in the report is sufficient enough, those questions should be directed to your assigned project officer as noted in your grant portfolio for your specific grant.

So with that we'd like to open up for questions.

Coordinator: Thank you. At this time we will begin the question and answer session. To ask a question you may please press star 1 on your touch-tone phone. Please unmute your phone and record your first and last name clearly when prompted.

To withdraw your question please press star 2. Once again if you would like to ask a question please press star 1 and record your name. One moment please for our first question.

Once again, if you would like to ask a question please press star then 1.

Our first question comes from (Patricia Froelich). Your line is open.

(Patricia Froelich): Hello. I'm wondering if these quarterly reports are for construction or alteration or renovation only. We have two components to our school-based health center grant; that is one. And the other component is equipment only. So do we only do the quarterly reports for the alteration and renovation or do we also have to include the equipment only?

Man: For school-based grantees, the quarterly progress report is due each quarter for all of your projects. So that would include your construction related projects as well as your equipment projects.

(Patricia Froelich): Okay, thank you.

Coordinator: Our next question comes from (Kathy Yakovone). Your line is open.

(Kathy Yakovone): Hi, Matt. (Kathy Yakovone). I just wanted to clarify that the narrative CD report that I thought we were requested to submit on September 30 is replaced by this report or are we supposed to do both reports?

Man: No, you're correct. This new system will now take the place of the - you're right, the unstructured form that we had you, capital development grantee submit for the last few quarters. So this now takes the place of that.

(Kathy Yakovone): Okay thank you. And also we still, for those of us who still have a CIP project, assuming the time period is the same or a few days earlier we're still using the same process for the CIP except we also have to put it into the AIRA Web site. Is that correct?

Man: Well with respect to CIP you would still utilize the HCQR tool.

(Kathy Yakovone): Right.

Man: So that would be separate system than this particular...

(Kathy Yakovone): Okay, so we're not doing that during this time. We have to go in separately and do CIP.

Man: Right. Exactly. Right.

(Kathy Yakovone): Okay.

Coordinator: Our next question comes from (Vincent Henry). Your line is open.

(Vincent Henry): Yes, my question is regarding the school-based health centers' equipment projects but I believe you answered it. I just wanted to make sure that, I guess once I get into the EHB it will be pretty much evident as to what I need to provide for equipment projects.

Man: Right. That is correct.

(Vincent Henry): Thank you.

Coordinator: Our next question comes from (Kathy DeMason). Your line is open.

(Kathy DeMason): Thank you. We got an email about the health center quarterly report. There's a phone call tomorrow about that. I'm assuming we don't need to listen to that if we've listened to this one.

Man: Well the health center quarterly report is for grantees that receive funding either through the recovery act opportunity so whether there was a (unintelligible), it's specific to those grants. So if you have one of those grants and you're still reporting I think it would still be relevant for you to call into that.

Does that answer your question?

(Kathy DeMason): Yes it did. Thank you.

Coordinator: Our next question comes from (Jenai Westover). Your line is open.

(Jenai Westover): Thanks. This is a follow-up question regarding the school-based health center grant reporting requirements. Will there be more than one quarterly report to complete if we have more than one project under that grant? Or will it all be in one report?

Man: Right, it's all technically one report. It's just different pages, if you will, within that report that you will provide data for. But you'll provide specific data for each of your projects, if you have different projects.

(Jenai Westover): Okay. That's helpful. Thank you.

Coordinator: Once again, if you would like to ask a question please dial star then 1. Our next question comes from (Edith Davis). Your line is open.

(Edith Davis): We have a school-based capital grant and my question is, looking at the forms it appears that there is a narrative on SFPPR Page 1, question 10. And

then it appears that there is a narrative on SFPPR Page 3, question two. Are we essentially telling the same information in both of those full pages?

Man: Right. The purpose of PPR three is to get to the detailed narrative specific to that project. The PPR one narrative which is technically available to you each time you get into the report. But the ultimate goal of that particular narrative is for you to document the final status of all your projects once they are complete and indicating all the successes, the patient's impacted, whatever, in that particular narrative.

So even though it's technically available for you to provide information there the purpose of it is to provide the final narrative once all your projects are complete.

(Edith David): So we could essentially leave that blank and just do the Page 3?

Man: I believe so, yes.

Man: Well, if it's final, if you're complete it's going to ask for final narrative. Yes.

Man: Right. If you indicate on PPR one that this is your final report then you will be required to submit information into the narrative.

(Edith David): But should we assume that if we say, "No" in question number eight that those subsequent questions actually won't appear to us?

Man: They will appear it's just that it won't be required. The system won't mandate that you provide information to address those questions.

(Edith David): If we don't answer Page 1 narrative until the end?

Man: Right. If you answer Page 1, if you say that this is not your final report the subsequent questions won't be required for you to submit your progress report.

Man: But on the other hand, if you do stipulate that the project is complete and final it will then force you to actually fill in that screen with a narrative.

(Edith David): We understand that. It sounded to me from your presentation as though page 3A was not relevant for school-based grants.

Man: That is correct. You're right.

Coordinator: Our next question comes from (Karen Ballengee). Your line is open.

(Karen Ballengee):Hi. My question concerns the project status. Right now we're in the selection process of an architect. Is that considered started or is started actually when we break ground?

Man: No, started is when you begin to implement the project from the very planning architectural drawing phase. So it's not that you've actually broken ground, it's that you've begun to do something cost-incurred related to the project that you're being funded for.

(Karen Ballengee):Okay, thank you.

Coordinator: Our next question comes from (Lynn Hall). Your line is open.

(Lynn Hall): Yes, hi. I think you've kind of almost sort of answered my question. I was going to ask if the project officially begins when we have the contract signed and on our desk. And I also had a kind of one of these silly weird question. Is there ever going to be like a Page 2 that's going to pop in here or is there just no Page 2?

Man: To answer your first question, right, it's basically, (unintelligible).

(Lynn Hall): When is the start date? Is it when the contract is signed and we have money to spend or is it like when we do all of these things like get the (unintelligible) letter and we're doing all of the pre-work?

Man: It's really tied to what we're funding your project. So if we're funding your project for the planning aspects, the A/E work, then when you begin to do that work and you start incurring costs related to that then your project is started.

(Lynn Hall): So it has to do with costs, basically.

Man: It tends to be a rule of thumb.

Man: Right. And then to answer your other question about Page 2. There is no Page 2. Right.

(Lynn Hall): Okay. So it's not going to surprise us somewhere down the line.

Man: Yes, I don't think so.

(Lynn Hall): Okay, great. I just wanted to know.

Coordinator: Once again if you would like to ask a question, please dial star then 1. Our next question comes from (Lynn Crane). Your line is open.

(Lynn Crane): Yes, we received the equipment-only SBHC grant. The cost for that equipment was pretty well good estimates but what we have found is that we will spend less money than what we planned. Will we be able to make a change in the budget to add additional equipment to spend all the money?

Man: In the event you have a modification to your budget like that I would suggest you contact your project officer to discuss.

(Lynn Crane): Okay. Thank you.

Coordinator: We have no further questions at this time.

Man: All right, great. On behalf of (Rod) and myself I'd just like to thank everyone for participating in the call. We hope everything goes well starting October 1 with the quarterly progress report and like I mentioned before, if you have any questions technically make sure you contact the BPHC help line and I will give you that number again. It's 877-974-2742. If you have any programmatic questions be sure to contact your assigned project officer for your respective grant.

And that's it. Thank you everyone.

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