



# Administrative Coaching Call

## Behavioral Health Recruitment and Retention

December 18, 2024 | 12 p.m. – 1 p.m. PT



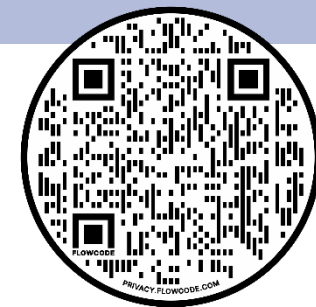
# Indigenous Land Acknowledgement

- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

## Whose land are you on?

Option 1: Enter your location at <https://native-land.ca>

Option 2: Access Native Land website via QR Code





# Advocates for Human Potential, Inc. (AHP) Behavioral Health Recruitment and Retention (BHRR) Team



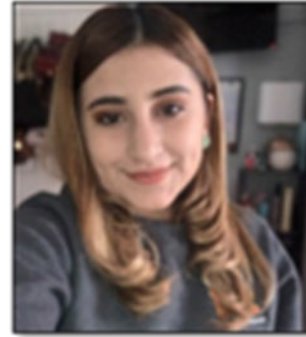
Susan Lange  
Program Director  
Workforce Innovation Lab



Kklara Moradian  
*BHR Deputy Project  
Director  
and Grantee Coach*



Roxanne Brooks  
*Grantee Coach*



Rosy Larios  
*Grantee Coach*



Sandra Gomez  
*Grantee Coach*



Angelica Rodriguez  
*Grantee Coach*



Neyat Tefery  
*Operations Specialist*



Caitlin Storm  
*Quality  
Assurance Coordinator*



Kate Cox  
*BHWD  
Operations Manager*



Kayla Halsey  
*BHWD Data & Analyses  
Manager*



Orly Hernandez  
*MSW Intern*

**This project would not be possible without the many amazing people who work in the background but are not on this slide.**

# AHP Workforce Development (WFD) Subject Matter Expert (SME) Team



Susan Lange  
*WFD SME and  
Program Director*



Allen Fowler  
*WFD SME and  
Senior Writer*



Martina Durant  
*WFD SME and  
Senior Program Manager*



# Agenda

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Overview of BHRR Grant

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BHRR Hub and Administrative Portal Access

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BHRR timeline and compliance

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Data and dashboard access

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BHRR reporting and invoicing

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BHRR financial requirements and audits

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Other reminders

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Susan Lange and Cklara Moradian closing remarks

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Final words by GCs

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Q&A

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# Questions

Please enter questions in the Q&A box. We will respond to questions throughout the session today.

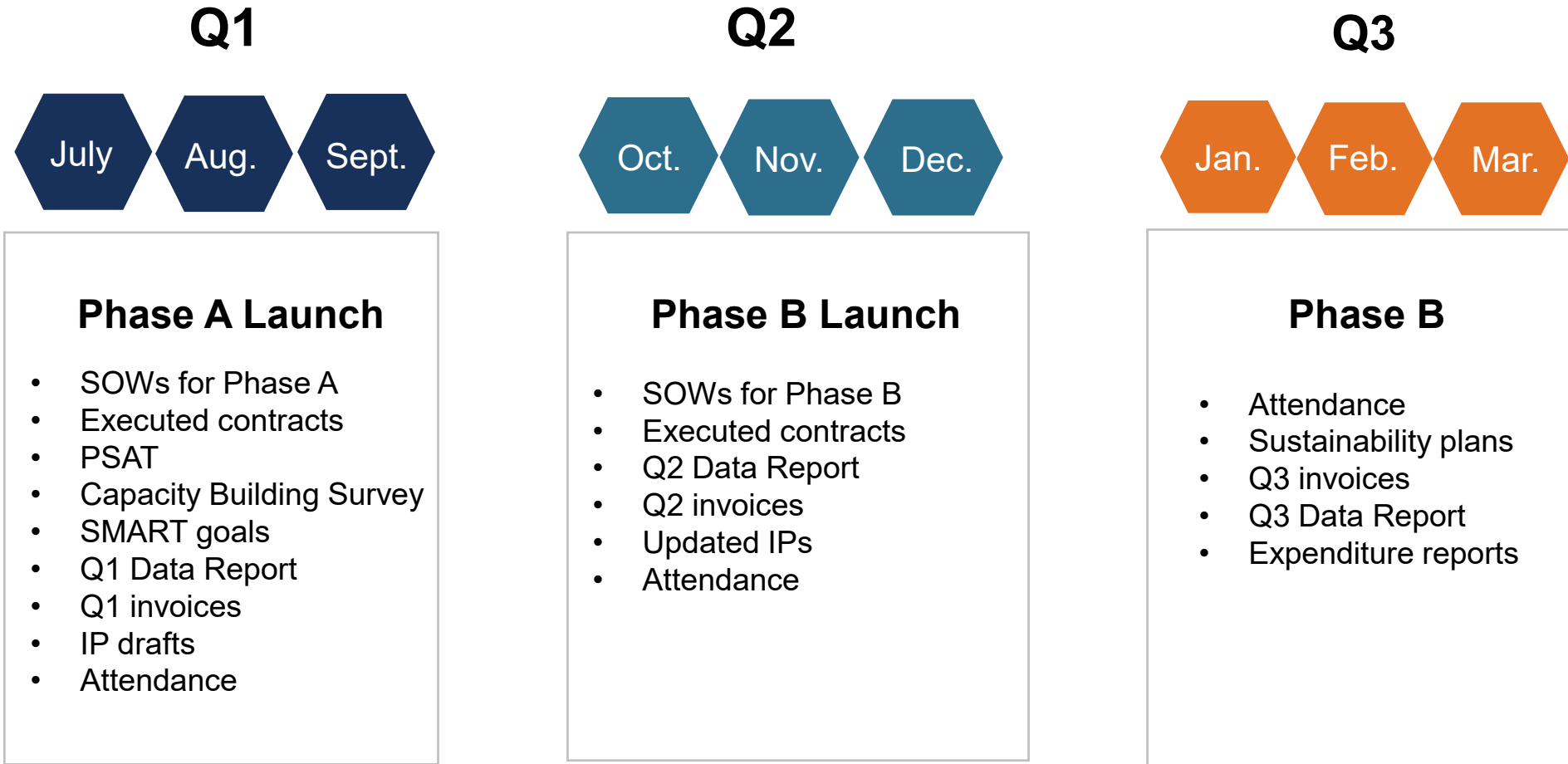


# Map of Grantee Awardees

BHRR Awardee Map



# Project Timeline and Deliverables



SOW = statement of work; PSAT = Program Sustainability Assessment Tool, SMART = specific, measurable, achievable, realistic, time-bound



# Project Timeline and Deliverables—Phase B cont.

## Q4



### Phase B

- Attendance
- Deliverables: SWOT analysis, community asset maps
- Q4 invoices
- Q4 data report
- Meeting with grantee leadership

## Q5



### Phase B

- Attendance
- Deliverables
- Q5 invoices
- Q5 Data Report

## Q6



### Phase B

- Attendance
- Deliverables
- Updated IP
- Q6 invoices
- Q6 Data Report
- Final data Report

## Q7



### Phase B

- Time for evaluation of project implementation
- Send final Implementation Plan
- FINAL INVOICE ONLY

SWOT = strengths, weaknesses, opportunities, threats; TBD = to be determined

# IMPORTANT DUE DATES FOR PROJECT CLOSEOUT

- The BHWD Grantee Equipment Survey is mandatory. If your organization has not completed this survey, please do so ASAP!
- The Quarter 6 Implementation Plan, substantiating documentation, invoice, and Quarterly Data Report (QDR) are due between 1/1/2025 and **1/15/2025. FIRM DEADLINE.** All attendance requirements must be met by this date.
- The Final Data Report is due no later than **1/15/2025. FIRM DEADLINE.**
- The final invoice is due between 2/1/2025 and **2/15/2025. FINAL FIRM DEADLINE.**
- Please also upload to the Admin Portal the most updated final Implementation Plan by **1/31/2025.**
- Last calls with Grantee Coaches will be in December 2024, unless a follow-up is needed in January 2025.

Last one-on-one meeting with GC will take place in December 2024 with possible follow-up in January 2025. AHP may contact grantees in case of missing data as late as March 2025. Please continue to monitor emails.

- Please prepare to share if your organization is on track to spend down **deliverable funds by 1/31/2025**.
- All **equipment dollars** must be spent by no later than **end of Q6 (12/31/2024)**.
- DHCS is not going to provide a no-cost extension for this grant.
- We are no longer able to process any requests for contract modifications.

**Last Day for ANY submissions (invoice, data, deliverables, etc.) is **2/15/2025!** Please do not miss this date.**

**AHP reserves the right to not pay invoices that are submitted after this date. We will not have the staff to process documents after this date.**





BHRR Hub

BHRR Administrative Portal

Access until June 2025 —  
Please download what you need.

Data Dashboard



# Grantee Data Dashboards

Log into the BHWD Grantee Portal and click on “Grantee Data Dashboard” in the menu on the left. You will see two dashboard tabs for your individual awarded site data and a separate tab for the aggregate data of all Grantees within your project (PWI, EPOC, MIP, or BHRR). Your individual data is only viewable by members of your organization who can log into the portal, and the aggregate project data is viewable by all Grantees within your project. You will find a welcome page with more information and instructions about your data dashboard in the “Overview” tab. We hope this data will be useful for project evaluation, quality improvement, grant writing, and securing future funding.

Please note: If you have multiple awarded sites, you will not see the data in the “Funding” tab of your data dashboard until mid-November.

All Grantees will receive a PDF copy of their data by early January 2025.



# Access to Data and the Dashboard



# Quarterly Data Reports (QDRs)



Quarterly reports are mandatory for grantees. Q6 QDR is different from the final report.



Quarterly reports are due 15 days after the end of the reporting quarter. For Q6, the QDR is due 1/15/2025. Firm deadline.



AHP must receive the quarterly reports and substantiating documentation before approving invoices. **DUE DATES ARE NOT OPTIONAL!**





**Final BHRR Report  
due 1/15/25. Firm deadline.  
Please keep in mind that final  
BHRR invoice will not be  
approved if the final report  
has not been submitted.**

**The final report is now open on the  
Admin Portal. Grantees can start this  
report and submit between 1/1/2025  
and 1/15/25.**



## Implementation Plans — We need a final updated IP by no later than 1/31/2025.

- Please keep a copy of your IP in case of an audit. You will need this document.



# BHRR Invoices

- Invoices are due between the 1st and 15th of the month following the end of a quarter. **THIS DEADLINE IS NOT OPTIONAL.** To avoid delay in payments, please submit your invoice as early as possible, but no later than the 15th of the month following the end of the quarter.
- Invoices can only be approved after the QDR and substantiating documentation have been submitted on the Administrative Portal. However, you can send your invoice to be processed by our accounting department as soon as the first of the month. Your GC will approve it once all documentation has been submitted.
- Effective April 1, 2024, BHRR invoices should be sent to [bhrrinvoices@ahpnet.com](mailto:bhrrinvoices@ahpnet.com) and your GC should be cc'd.
- Please communicate this email change to your finance department or appropriate staff.
- Please follow the directions on the invoice template carefully.
- The new template can be found on the BHRR Hub.
- **DO NOT SEND INVOICES TO THE AP2 EMAIL ADDRESS!**

## Advocates For Human Potential, Inc.

Instructions for completing the Behavioral Health Recruitment and Retention (BHRR)  
Invoice Template

### Grantee Quarterly Deliverables Invoice

1. Invoices are to be completed and submitted to AHP promptly upon completion of deliverables. Invoices received more than 30 days after the completion of deliverables may not be eligible for payment.
2. Complete the top portion of the invoice with your organization name, address, phone, and email contact information.
3. Include your unique BHWD Site ID. This can be found in your contract.
4. Refer to the "Payment Schedule" provided with your Subcontract Agreement and fill out the invoice grid with the following information:
  - a) Deliverable Amount (for equipment and for all other expenses).
5. If submitting for equipment reimbursement, you must submit receipts with the invoice. Please remember to itemize specific equipment purchases on the invoice form.
6. Please be sure to verify your total; an invoice with incorrect values will be returned to the subcontractor for re-submission.
7. Sign and date the invoice where indicated. Complete the fillable form and mail the invoice to [BHRRinvoices@ahpnet.com](mailto:BHRRinvoices@ahpnet.com).
8. Payment shall be remitted, depending on the grantee's noted preference, via First Class Mail or direct deposit within 10 business days after being received by AHP's A/P, and reviewed, approved, and signed by the Project Director, Grantee Coach, and Accounting. No invoice will be approved for payment if you do not have your fully executed subcontract, or if A/P does not have your signed W-9 form on file.
9. Questions or concerns regarding AHP's invoicing, and payment process may be directed to our Accounts Payable department at [BHRRinvoices@ahpnet.com](mailto:BHRRinvoices@ahpnet.com).



Catalog of Federal Domestic Assistance (CFDA)  
number for the  
Behavioral Health Workforce Development (BHWD) grants:  
**93.959**

This is the CFDA number to give to the grantee organization's finance department for audit purposes.

# DHCS/AHP Audits

The California Department of Health Care Services (DHCS) intends to conduct audits on most organizations receiving BHRR funding. We strongly encourage all grantee organizations to maintain meticulous records detailing the use of BHRR funds. Funds awarded must exclusively support BHRR strategies. Failure to use these funds appropriately (not meeting grant deliverables) by the end of the period of performance in January 2025 will necessitate their return to DHCS. If a grantee fails to meet deliverable compliance and must prematurely end the project, all equipment purchased with BHRR funds must be returned. Please be aware that the following items may be requested during an audit:

Initial Audit Request	Grantee-Specific Requests Later in the Audit Process
<ul style="list-style-type: none"><li>• Proof of insurance for entire duration of contract.</li><li>• Most recently completed financial, compliance, or single federal audits completed within the last three years.</li><li>• Copies of documented internal controls or standard operating procedures related to the BHWD project (this initiative includes BHRR), such as the following:<ul style="list-style-type: none"><li>○ Approval processes for payroll/timesheet submissions.</li><li>○ Procurement and accounting procedures for purchases of goods and services.</li><li>○ Policies directly related to the program performance, compliance, or deliverables for the BHWD project.</li><li>○ Inventory tracking list as required by the BHWD Subcontractor Agreement.</li><li>○ Detailed financial statement of activity or expenditures for the BHWD project (broken down by individual transactions).</li><li>○ Completion of internal controls questionnaire (questionnaire provided by auditor during audit).</li><li>○ Confirmation of payments received by grantee from AHP (letter provided by auditor during audit).</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Documentation proving completion of deliverables in the SOW and in the TTA/Implementation Plan.</li><li>• Documentation—such as timesheets, paychecks, invoices, receipts, etc.—related to purchases listed in the grantee’s financial statement of activity.</li></ul>

# Reminders

- The **BHRR Phase B [Outward Facing Contact Roster](#)**, now available on the BHRR Hub, is an essential resource for networking and collaboration. It features the contact details of various BHRR organizations open to being contacted by other grantees.
- Organizations still have access to the full BHWD roster of events until March 2025. Please download any materials you need ASAP.
- Please subscribe to DHCS, HCAI, and SAMHSA newsletters for future funding opportunities.



# Deputy Director Closing Remarks



# Questions

Please enter questions in the Q&A box. We will respond to questions throughout the session today.





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*Thank you!*

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# Resources

- **Asset Mapping Example:** [http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/Asset-Mapping-example\\_508.xlsx](http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/Asset-Mapping-example_508.xlsx)
- **BHRR Asset Mapping Tip Sheet:** [https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Asset-Mapping-Tip-sheet\\_508.pdf](https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Asset-Mapping-Tip-sheet_508.pdf)
- **BHRR Deliverable Tip Sheet:** [https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Deliverable-Tip-Sheet\\_508.pdf](https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Deliverable-Tip-Sheet_508.pdf)
- **BHRR Tip Sheet for Expenditure Reports:** [https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/03/Tip-sheet-for-Expenditure-Report-and-Guidance-on-Use-of-Funds\\_508.pdf](https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/03/Tip-sheet-for-Expenditure-Report-and-Guidance-on-Use-of-Funds_508.pdf)
- **BHRR Tip Sheet for Submitting Invoices:** [https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/Tips-for-Submitting-Invoices\\_508.pdf](https://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/Tips-for-Submitting-Invoices_508.pdf)
- **Quarterly Report Tip Sheet:** [http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Quarterly-Report-Tip-Sheet\\_508.pdf](http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/04/BHRR-Quarterly-Report-Tip-Sheet_508.pdf)
- **Strategic Planning Guide:** [http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/03/Strategic-Planning-Guide\\_508.pdf](http://www.workforce.buildingcalhhs.com/wp-content/uploads/2024/03/Strategic-Planning-Guide_508.pdf)