



Family Planning Timeline for Deliverables Grant Year 2022-2023

Documentation MUST be submitted electronically to: rjohnston@wyhc.org and gwilson@wyhc.org
unless otherwise indicated

1. Provided templates/forms MUST be used when submitting documents. Only current WHC templates/forms will be accepted, other templates/forms will be rejected. These are either sent directly to the directors or can be found at <https://www.wyhc.org/forms/>.
2. Site specific Revenue and Expense Report (previously E&R) spreadsheets are provided to the Project Directors. Spreadsheets are protected and only unlocked cells may be filled.
3. Hard copies should be kept in the delegate agency office and available upon request for program site visits/audits. Deliverables can be submitted prior to the due dates. Consistently late deliverables may result in a decrease of funding.
4. Ensure current required FPAR data elements are entered into Ahlers. FPAR 2.0 data collection began January 1, 2022 and grantee reporting in 2023.
5. Federal Poverty Guidelines must be applied within 30 days of receipt from the grantee. Generally released by HHS in January of the same year.
6. Subrecipient Agency Project Directors must review current OPA Program Review Tool and Title X Requirements. OPA is expected to release new versions in May 2023.
7. Periodically, OPA and WHC will ask for additional documentation. We will make every effort to allow you time to respond to those requests.

| Year 1 | April 1, 2022-March 31, 2023 |
|---|--|
| Service Delivery Meetings | Quarterly – dates TBD |
| 340B Recertification (documentation kept at agency) | May 9–June 6, 2022 AO and PC watch for email from 340B OPAIS/340B PVP |
| Non-competing grant application for Year 2 | Early in 4 th quarter. Exact due date TBD |
| Client Satisfaction Survey participation | Ongoing |

| First Quarter | April 1- June 30, 2022 | Due July 31, 2022 |
|---|-------------------------------|--------------------------|
| Revenue and Expense Report for April-May-June | | |
| Board Minutes for April-May-June | | |
| * Community Education Report Community Education send to srichardson@wyhc.org | | |
| * Title X Mandatory Staff Training (additional training lists should be kept at agency) | | |
| * Chart Audit | | |
| * Training and Education Needs Assessment Survey | | |
| 2022 Clinical Manual Review Signature Sheet | | |
| Schedule of Discounts and Sliding Fee Scale | | Due May 13, 2022 |
| Agency Superbill and CVR | | Due May 13, 2022 |

| Second Quarter | July 1-September 30, 2022 | Due October 28, 2022 |
|---|----------------------------------|-----------------------------|
| Revenue and Expense Report for July-August-September | | |
| Board Minutes for July-August-September | | |
| * Community Education Report Community Education send to srichardson@wyhc.org | | |
| * Statement of Understanding - completed by all Title X staff | | |
| * Chart Audit | | |
| Financial Audit / Balance Sheet / Profit and Loss Statement | | |
| Copy of all insurances (Medical liability and commercial policies) | | |
| Subrecipient Agency Policy & Procedures Manual - to align with current OPA Program Review Tool | | August 1, 2022 |

| Third Quarter | October 1- December 31, 2022 | Due January 31, 2023 |
|---|-------------------------------------|-----------------------------|
| Revenue and Expense Report for October-November-December | | |
| Board Minutes for October-November-December | | |
| * Community Education Report Community Education send to srichardson@wyhc.org | | |
| License verification of medical staff | | |
| * Chart Audit | | |
| Revised Budget (if applicable) | | |
| Cost Analysis Data | | |
| * FPAR and FTE Report | | Due January 13, 2023 |

| Fourth Quarter | January 1- March 31, 2023 | Due April 28, 2023 |
|---|----------------------------------|---------------------------|
| Revenue and Expense Report for January-February-March | | Due April 14, 2023 |
| Board Minutes for January-February-March | | |
| * Community Education Report Community Education send to srichardson@wyhc.org | | |
| * Chart Audit | | |
| Final Work Plan Progress Report for year 1 | | Due May 26, 2023 |

3.2022

*Templates or links are available at <https://www.wyhc.org/> under For Subrecipients