



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		Due July 22, 2022
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		Due October 14, 2022
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		Due January 20, 2022
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 20, 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/ updated 7.2022

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