This document will guide you through completing a Work Plan and Progress Report in the Technical Assistance and Grant Management Equity Portal, "Equity Portal".

California Department of Public Health

Office of Health Equity

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Prepared By: Crowe LLC

Reviewed By: Office of Health Equity

Work Plan and Progress Report User Guides

Work Plan Submission as an Awardee

1. Navigate to the **Equity Portal** homepage
2. Select **Sign In** from the top right header of the Homepage
   a. If you forget your username, reach out to EquityPortalSupport.ca.gov for assistance
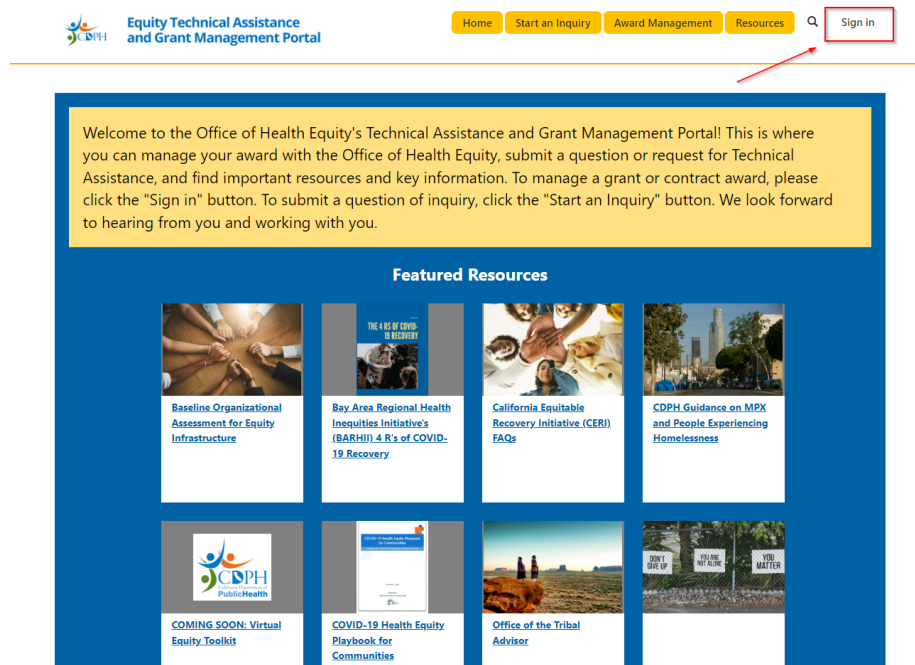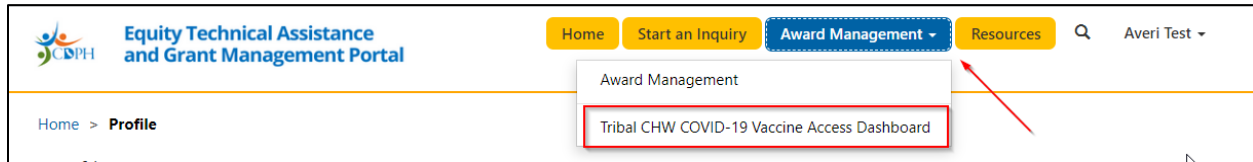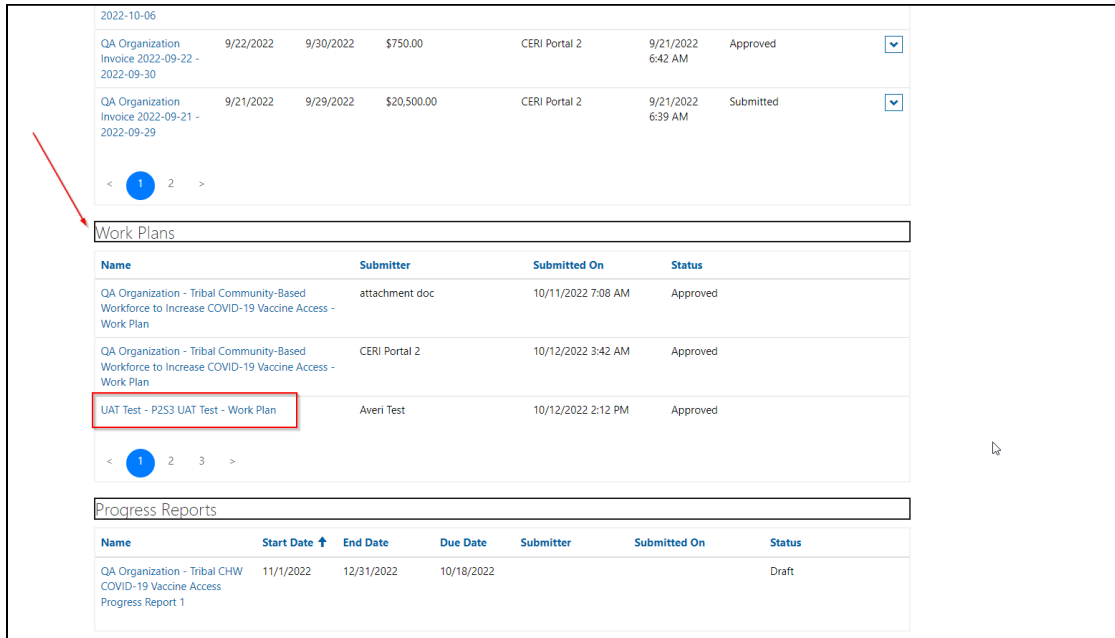

3. Navigate to Award Dashboard from the **Award Management** button, circled below, and

select your active grant

4. From the Work Plans section, select your **Work Plan**

Note: You will be entering a series of Goals, Objectives, and Activities. Each Activity is linked to an Objective and each Objective is linked to a Goal.

- Goals describe the overall impact of your Work Plan,
- Objectives are the strategies you use to reach those Goals, and
- Activities are the detailed steps and actions you take to fulfill the respective Objectives and Goals

5. From the **Goals** section, select **Sample Goal 1** to edit the Goal

Home > Award Management > Tribal CHW COVID-19 V... > **Tribal Work Plan - Edit**

Tribal Work Plan - Edit

Work Plan Details

Name *
UAT Test - P2S3 UAT Test - Work Plan

Due Date
—

Goals		Objectives	
	Add Goal		Add Objective

Goal Name ↑		Objective Name ↑	Goal	
UAT Goal 1	▾	UAT Objective 1	UAT Goal 1	▾

Activities

Add Activity

Activity Name	Related Objective	Activity Description	Target Performance Metric	Start Date	End Date	Status	
UAT Activity 1	UAT Objective 1	This is a sample activity for UAT testing.	Performance metric test	10/12/2022	10/19/2022	Saved	▾

Goals		Objectives
	Add Goal	

Goal Name ↑		Objective Name ↑
UAT Goal 1	▾	UAT Objective 1

View Goal
Edit Goal
Remove Goal

Activities

☑ Edit   ✕

General

Goal Name *

UAT Goal 1

Submit

6. From the **Objectives** section, select **Sample Objective 1**

7. From the **Activities** section, select **Sample Activities 1**

Note: Every time you save a Goal, Activity, or Objective, all the current text in your Work Plan is saved. The entire Work Plan saves as you go. Even if you were to close your browser or lose power, you work would be saved.

Additional guidance:

- The **Performance Metric** can be any combination of numbers or letters
- If your Grant Manager has already prescribed a **Performance Metric**, enter that with the corresponding activity. If there are no required performance metrics for your program- this field is **OPTIONAL**
- If you **DO** opt in to setting a **Performance Metric**, subsequent performance reports will request you to report on your progress

8. Submit Work Plan

Note: Please make sure you are only submitting your Work Plan if you are ready to have your Grant or Contract Manager review it. Once you have submitted, you will not be able to edit your Work Plan unless your Award Manager manually returns it to you.

Reviewing and Responding to Award Manager Feedback

1. Receive an email notifying you that your Work Plan has been returned with Feedback

2. Select the hyperlink in the email to navigate back to the Equity Portal, then sign-in
3. Navigate to your **Award Dashboard**, then locate your returned **Work Plan**

4. Review the **Award Manager Feedback**
    a. **Related Goal, Objective or Activity-** This is the exact item on your Work Plan that your Award Manager has left you feedback about. This is the item that should be reviewed
    b. **Type**- This tells you whether the Item is a Goal, Objective or Activity
    c. **Feedback Type**- This is the type of Feedback that your Grant or Contract Manager has left you. Your response options are different based on the type of Feedback
        i. **Recommended**- A change that is not required, but is recommended
            1. Awardee Feedback Status options are:
                a. Accepted
                b. Rejected
        ii. **Required**- A change that is required in order for the Work Plan to be approved
            1. Awardee Feedback Status options are:
                a. Updated
        iii. **Award Manager Edit Notification**- Your Award Manager made a change to your Work Plan internally that need you to acknowledge
            1. Awardee Feedback Status options are:
                a. Acknowledged
        iv. **Question**- Your Award Manager has a question that they need you to Answer

1. Awardee Feedback Status options are:
   a. Answered

5. Make any necessary changes to the Work Plan. <u>You must do this first</u>, before returning the Work Plan

6. **Respond to Award Manager Feedback**

7. Select your **Award Feedback Status**
   a. Your Response options are limited based on the type of Feedback your Award Manager sent

8. Respond to Feedback
   a. Write out what you updated, comments our thoughts about the feedback, answer any questions your Award Manager has, or otherwise respond to the Feedback

9. **Submit** Feedback
10. **Submit** Work Plan

11. You will get an email telling you that your submission has been successful. Your Award Manager will either approve or re-return your Work Plan again

Submitting a Progress Report as an Awardee

1. Log into the **Equity Portal**
2. From the **Award Management** Button, select the relevant **dashboard** for your Award
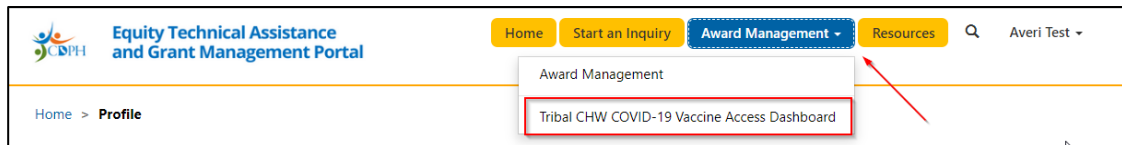
3. Navigate to the **Progress Report** section and select the Progress Report corresponding to your submitted **Activity** from the Work Plan

4. Under the **Activity progress** heading, select the dropdown arrow and choose **Edit**

Note: You will only see Activities that have started, based on the dates you entered for each Activity in your Work Plan. If you don't see some Activities, it's because they are not scheduled to have started yet **OR** because you have already marked them as "complete" in a previous Progress Report

5. Update all the Progress Report fields
   a. Make sure to include as much detail as necessary to give your Award Manager a good picture of activity progress

Additional guidance:

- **Performance to Date**: If you have a Target Performance Metric, you will see it appear there and you will be required to enter data in the Performance to Date field. It can be any combination of numbers and letters, as long as it tracks with your Target Performance metric

- **Start Date and End Date:** The Start Date and End Date reflect the dates that you selected for the Activity on your Work Plan. These are not editable. They are here to remind you of your projected Start Date and End Date for your Activity. It is okay if these dates have changed a little bit

- **Progress on Activity**: Select the percentage that feels the best for you, based on the progress made during the reporting period AND based on your project Start and End Dates. Please Note that if you mark an Activity as "Complete" you will not see it again on your Progress Report!! You should only mark an Activity as "Complete" if you have finished it and will never do it again during your Award period

- **Capacity To Complete Activity**: Capacity means time, resources, staff, supplies and anything else that you need to conduct your work.

- **Summary of Progress**: Please give as much narrative description and other details that your Grant or Contract Manager needs to know about your Progress Report

Note: **Experiencing Barriers**: If you select No, you are done with your Progress Report. If you select Yes, you will be required to describe your barriers under **Summary of Barriers**

6. **Save** Activity Progress
7. Select **Submit Progress Report**

8. Return Vs. Approval
   a. You will get an email letting you know that your submission has been successful.

b. Your Award Manager will review your Progress Report if they let you know if they have any questions. They may Return it to you or Approve the Progress Report. You will be notified over email either way

Review and Respond to Award Manager Feedback

1. Receive an email notifying you that your Progress report has been returned with feedback
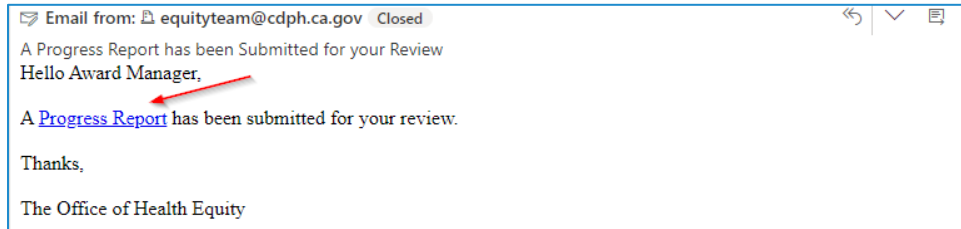
2. Select the hyperlink in the email to navigate back to the **Equity Portal**, then sign-in
3. Navigate to your **Award Dashboard**, then locate your returned Progress Report

4. Review the **Award Manager Feedback**
   a. **Related Goal, Objective or Activity-** This is the exact item on your Work Plan that your Award Manager has left you feedback about. This is the item that should be reviewed
   b. **Type-** This tells you whether the Item is a Goal, Objective or Activity
   c. **Feedback Type-** This is the type of Feedback that your Grant or Contract Manager has left you. Your response options are different based on the type of Feedback
      i. **Recommended-** A change that is not required, but is recommended
      ii. **Required-** A change that is required in order for the Progress Report to be approved
      iii. **Award Manager Edit Notification-** You made a change to the Progress Report, as the Award Manager, that you want the submitter to notice
      iv. **Question-** You have a question that you need the Awardee to answer

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your Progress Report again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

Last Updated	Related Activity Progress	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response	
3/3/2023 2:13 PM	Fruit Juice Project - 1.1.1	Question	What type of juice?			⌄

5. Make any necessary changes to the Progress Report
6. Respond to **Award Manager Feedback**

Feedback

To respond to Feedback, first read the Feedback from your Award Manager. Then, scroll up to the item your Award Manager commented on. Update, review, or acknowledge your item as per instructions, then return to the Feedback table. Respond to the feedback as applicable in the Awardee Response field, then choose an updated Feedback Status to reflect your actions. Finally, Submit your Progress Report again to your Award Manager. You must update the Feedback Status for each piece of Feedback in order to be able to re-submit.

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Respond to Feedback
View Feedback

7. Select your **Award Feedback Status**
   i. **Recommended**- A change that is not required, but is recommended
      1. Awardee Feedback Status options are:
         a. Accepted
         b. Rejected
   ii. **Required**- A change that is required in order for the Progress Report to be approved
      1. Awardee Feedback Status options are:
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      1. Awardee Feedback Status options are:
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8. Respond to **Feedback**
   a. Write out what you updated, comments our thoughts about the feedback, answer any questions your Award Manager has, or otherwise respond to the Feedback

9. **Submit** Feedback Response
10. **Submit** Progress Report

11. You will receive a confirmation email that your Invoice has been submitted
    a. If it is approved, you will get an email notification when your Award Manager approves it

b. If your Award Manager has additional feedback, they will return it again and the new feedback will appear underneath the original feedback. You will be able to identify different rounds of feedback by the "Last Updated" date next to the feedback