

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

Last Updated: March 9th, 2023

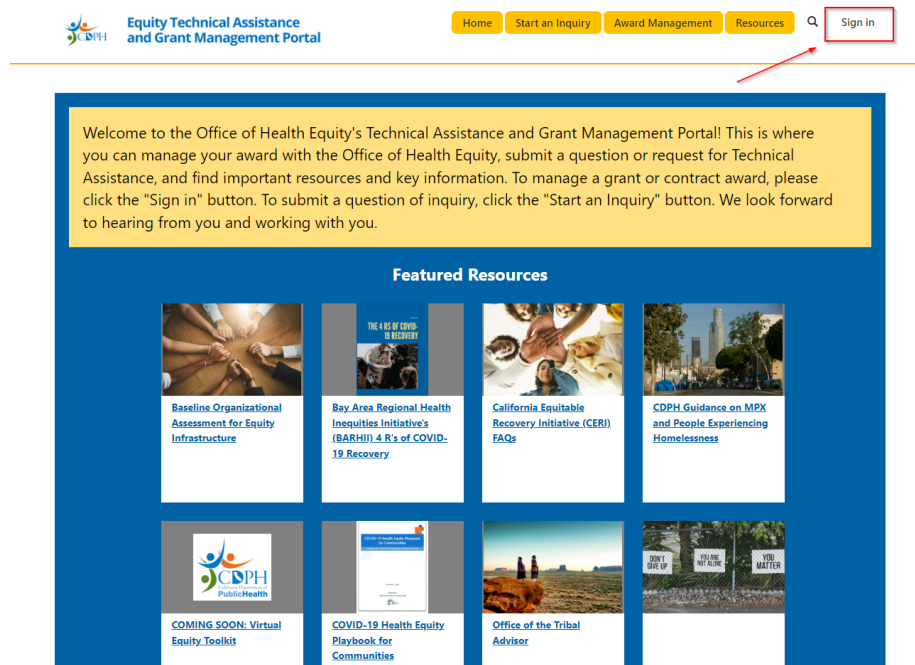
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Reviewed By: Office of Health Equity

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



Sign in with a local account

1 * User name

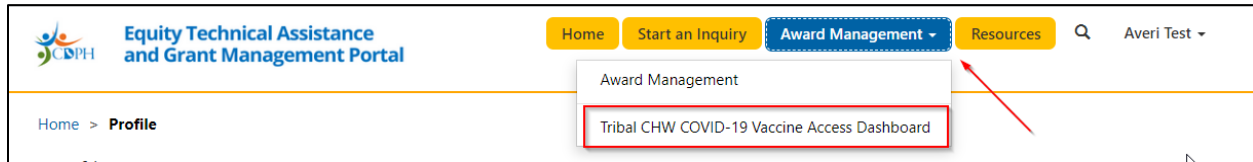
2 * Password

Remember me?

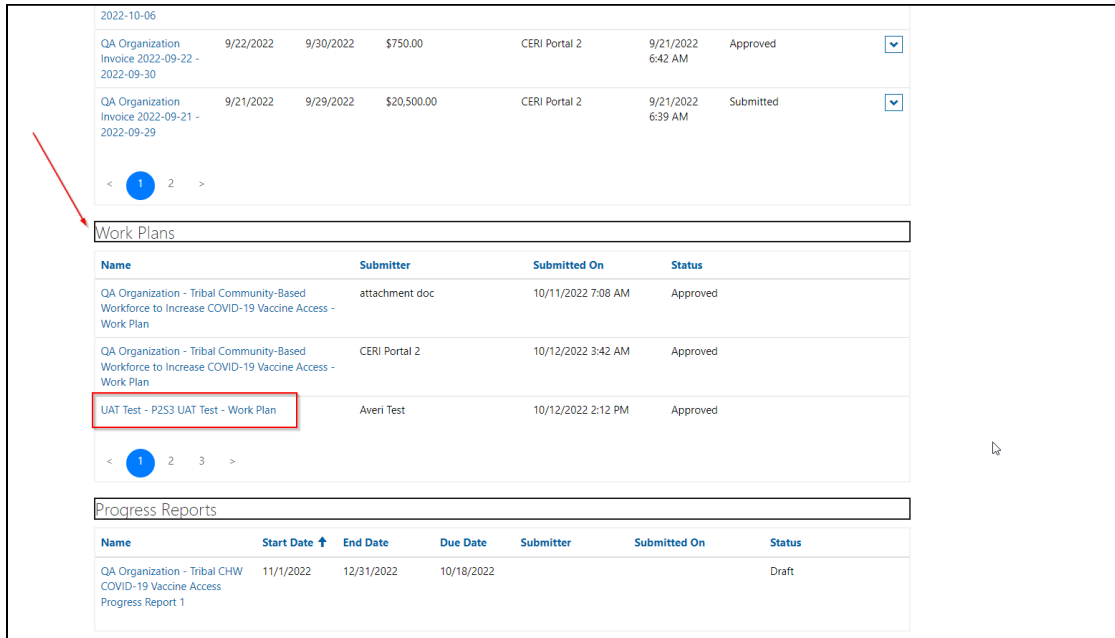
3

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

Tribal Work Plan - Edit

Work Plan Details

Name *

UAT Test - P2S3 UAT Test - Work Plan

Due Date

—

Goals

Add Goal

Objectives

Add Objective

Goal Name ↑

UAT Goal 1



Objective Name ↑

UAT Objective 1

Goal

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

Add Goal

Objectives

Goal Name ↑

UAT Goal 1

Objective Name ↑

UAT Objective 1

Activities



- View Goal
- Edit Goal
- Remove Goal

Edit

General

Goal Name *

UAT Goal 1

Submit

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

The screenshot shows the 'Tribal Work Plan - Edit' page. At the top, there is a navigation bar with the logo for 'Equity Technical Assistance and Grant Management Portal' and several menu items: 'Home', 'Start an Inquiry', 'Award Management', and 'Resources'. Below the navigation bar, the breadcrumb trail reads: 'Home > Award Management > Tribal CHW COVID-19 V... > Tribal Work Plan - Edit'. The main heading is 'Tribal Work Plan - Edit'. Underneath, there is a 'Work Plan Details' section with fields for 'Name' (UAT Test - P2S3 UAT Test - Work Plan) and 'Due Date'. The 'Goals' section contains an 'Add Goal' button and an 'Objectives' section with an 'Add Objective' button. The 'Objectives' section has a table with columns 'Objective Name' and 'Goal'. The first row shows 'UAT Objective 1' and 'UAT Goal 1'. A red box highlights the 'Objectives' section header and the first row of the table. A red arrow points to a dropdown menu icon in the 'Goal' column of the first row. Below the 'Objectives' section is an 'Activities' section with an 'Add Activity' button and a table with columns: 'Activity Name', 'Related Objective', 'Activity Description', 'Target Performance Metric', 'Start Date', 'End Date', and 'Status'. The first row of the activities table shows 'UAT Activity 1', 'UAT Objective 1', 'This is a sample activity for UAT testing.', 'Performance metric test', '10/12/2022', '10/19/2022', and 'Saved'.

This is a close-up view of the 'Objectives' section. It features an 'Add Objective' button at the top right. Below it is a table with columns 'Objective Name' and 'Goal'. The first row contains 'UAT Objective 1' and 'UAT Goal 1'. A dropdown menu icon is visible in the 'Goal' column. A context menu is open over this icon, showing three options: 'View Objective', 'Edit Objective', and 'Remove Objective'. The 'Edit Objective' option is highlighted with a red box.

Edit ×

Add Objective

Work Plan

Goal

Objective Name *

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

Equity Technical Assistance and Grant Management Portal Home Start an Inquiry Award Management Resources Q Averit Test

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**

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

Activities

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	<input type="button" value="x"/>

Activities

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	<input type="button" value="x"/> <ul style="list-style-type: none"> View Activity Edit Activity Remove Activity

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, your work would be saved.

The screenshot shows a web form titled "Edit" with a close button (X) in the top right corner. The form is titled "Add a new activity" and contains the following fields:

- Objective:** A text input field containing "UAT Objective 1" with a blue 'X' icon and a magnifying glass icon to its right.
- Activity Name *:** A text input field containing "UAT Activity 1".
- Start Date:** A date picker field showing "10/12/2022" with a calendar icon to its right.
- End Date:** A date picker field showing "10/19/2022" with a calendar icon to its right.
- Activity Description:** A large text area containing the text "This is a sample activity for UAT testing." with a small icon in the bottom right corner.
- Target Performance Metric:** A text input field containing "Performance metric test".

A blue "Submit" button is located at the bottom left of the form. A vertical scrollbar is visible on the right side of the form area.

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

Work Plan Details

Name *
UAT Test - P253 UAT Test - Work Plan

Due Date
—

Goals [Add Goal](#)

Objectives [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

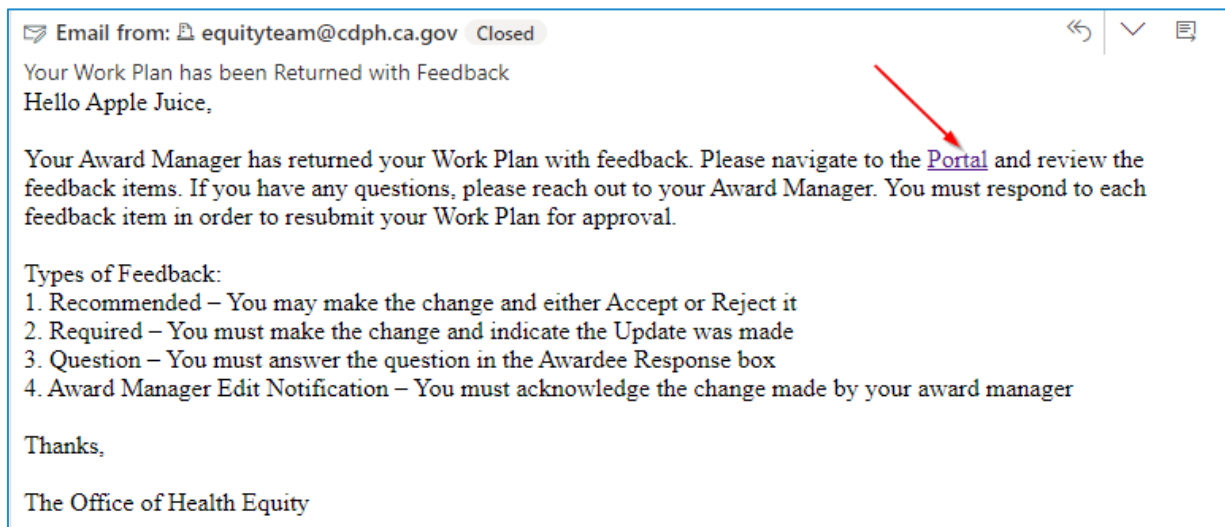
[Submit Work Plan](#)

[Privacy Statement](#)

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**

Equity Technical Assistance and Grant Management Portal

Home Start an Inquiry Award Management Resources Apple Juice

Home > Award Management > Tribal CHW COVID-19 Vaccine Access

Tribal CHW COVID-19 Vaccine Access

Inquiries

Inquiry Number	Description	Artifact Type	Date Requested ↓	Status
INQ-01185	What goes in my Expenditure Report???	Expenditure Report	1/25/2023 3:26 PM	Submitted

Invoices

Request Invoice Technical Assistance New Invoice

Invoice	Start Date ↓	End Date	Total Invoice Amount	Submitted By	Submitted On	Status
There are no records to display.						

Work Plans

Name	Due Date	Submitter	Submitted On	Status
Fruit Juice Inc - Tribal Community-Based Workforce to Increase COVID-19 Vaccine Access - Work Plan		Apple Juice	3/3/2023 11:15 AM	Returned


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

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 Work Plan 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 Goal	Related Objective	Related Activity	Type	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response
3/3/2023 11:17 AM			1.1.3 Activity C	Activity	Recommended	Provide more detail		

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

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 Work Plan 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 Goal	Related Objective	Related Activity	Type	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response
3/3/2023 11:17 AM			1.1.3 Activity C	Activity	Recommended	Provide more detail		 <div data-bbox="1247 1104 1468 1167" style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> 1 Respond to Feedback View Feedback </div>

7. Select your Award Feedback Status

- a. Your Response options are limited based on the type of Feedback your Award Manager sent

Respond to Feedback

Recommended

Feedback *
Provide more detail

Response

2 **Awardee Feedback Status ***

Accepted
Rejected

Submit Response

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

Respond to Feedback ×

Recommended

Feedback *
Provide more detail

Response

Awardee Feedback Status *
Accepted

3 **Awardee Response ***
Done

4 **Submit Response**

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

Comments

Test

Inquiries [Request Technical Assistance](#)

Inquiry Number	Description	Artifact Type	Date Requested ↑	Status
There are no records to display.				

Please attach any additional files that your Award Manager has requested or that need to be reviewed along with your report.

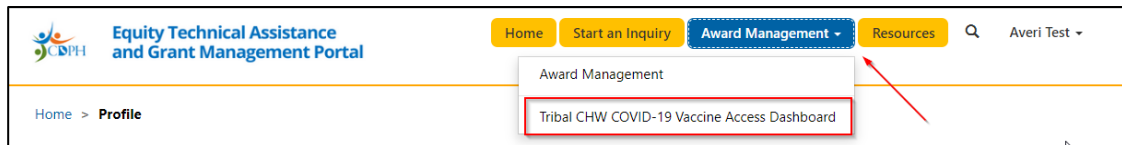
[Choose Files](#) | Screenshot ...141002.png

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

QA Organization Invoice 2022-09-22 - 2022-09-30 9/22/2022 9/30/2022 \$130,000 CERl Portal 2 9/21/2022 6:42 AM Approved

QA Organization Invoice 2022-09-21 - 2022-09-29 9/21/2022 9/29/2022 \$20,500.00 CERl Portal 2 9/21/2022 6:39 AM Submitted

Work Plans

Name	Submitter	Submitted On	Status
QA Organization - Tribal Community-Based Workforce to Increase COVID-19 Vaccine Access - Work Plan	attachment doc	10/11/2022 7:08 AM	Approved
QA Organization - Tribal Community-Based Workforce to Increase COVID-19 Vaccine Access - Work Plan	CERl Portal 2	10/12/2022 3:42 AM	Approved
UAT Test - P253 UAT Test - Work Plan	Averil Test	10/12/2022 2:12 PM	Submitted

Progress Reports

Name	Start Date ↑	End Date	Due Date	Submitter	Submitted On	Status
QA Organization - Tribal CHW COVID-19 Vaccine Access Progress Report 1	11/1/2022	12/31/2022	10/18/2022			Draft

Privacy Statement

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

Equity Technical Assistance and Grant Management Portal

Home Start an Inquiry Award Management Resources Q Averl Test

Home > Award Management > Tribal CHW COVID-19 V... > Tribal Progress Report

Tribal Progress Report

Project Name — **Submitter** —

Award Number
dfdf


Date Last Submitted
—

Status
Draft

Activity Progress

Activity Number ↑	Activity Name	Progress on Activity	Status
1.1.1	Sample Activity 1		Draft

Additional Comments/Concerns

 Edit

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

The screenshot shows a web-based form titled "Update Progress" within an "Edit" window. The form is organized into several sections:

- Activity Name:** A text input field containing "Sample Activity 1".
- Activity Description:** A larger text area containing "This is a sample activity".
- Target Performance Metric:** A field with a hyphen "-" as the current value.
- Performance to Date:** An empty text input field.
- Start Date:** A date picker field showing "M/D/YYYY".
- End Date:** A date picker field showing "M/D/YYYY".
- Progress on Activity *:** A dropdown menu.
- Capacity to Complete Activity *:** A dropdown menu.
- Summary of Progress *:** A large empty text area at the bottom of the form.

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

The screenshot shows a form section titled "Experiencing Barriers". It contains two radio buttons: "No" (selected) and "Yes". Below this is a section titled "Summary of Barriers" with a large empty text area for input. At the bottom of the form is a yellow button labeled "Save Activity Progress".

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**

The screenshot shows the "Tribal Progress Report" form. It includes fields for "Project Name", "Award Number" (with value "dfdf"), "Date Last Submitted", and "Status" (with value "Draft"). Below these is an "Activity Progress" table:

Activity Number ↑	Activity Name	Progress on Activity	Status
1.1.1	Sample Activity 1		Draft

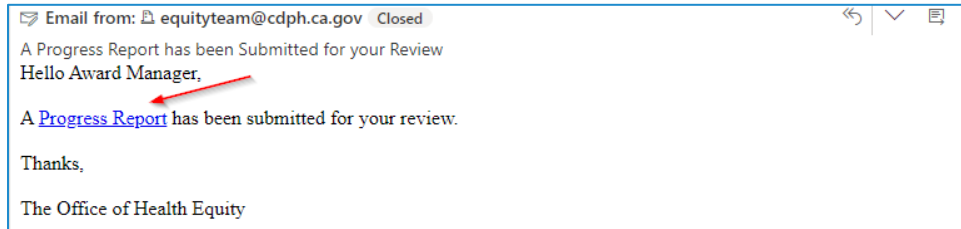
Below the table is an "Additional Comments/Concerns" text area. At the bottom left, a yellow button labeled "Submit Progress Report" is highlighted with a red box. At the bottom center, there is a link for "Privacy Statement".

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

Progress Reports						
Name	Start Date ↑	End Date	Due Date	Submitter	Submitted On	Status
Fruit Juice Inc - Tribal Community-Based Workforce to Increase COVID-19 Vaccine Access - Progress Report 1	9/13/2022	12/30/2022	1/12/2023	Apple Juice	3/3/2023 1:33 PM	Returned
Fruit Juice Inc - Tribal Community-Based Workforce to Increase COVID-19 Vaccine Access - Progress Report 1	1/18/2023	2/7/2023	2/8/2023	Apple Juice	1/12/2023 1:12 PM	Submitted

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?		<input type="text"/>

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.

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?		<input type="text"/>

7. Select your **Award Feedback Status**

i. **Recommended**- A change that is not required, but is recommended

1. Awardee Feedback Status options are:

- Accepted
- Rejected

ii. **Required**- A change that is required in order for the Progress Report to be approved

1. Awardee Feedback Status options are:

- Updated

iii. **Award Manager Edit Notification**- Your Award Manager made a change to your Progress Report internally that need you to acknowledge

1. Awardee Feedback Status options are:

- Acknowledged

iv. **Question**- Your Award Manager has a question that they need you to Answer

1. Awardee Feedback Status options are:

- Answered

Respond to Feedback

Question

Feedback *
What type of juice?

Response

Awardee Feedback Status *

Answered

Submit Response

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

Respond to Feedback ✕

Question

Feedback *

What type of juice?

Response

Awardee Feedback Status *

Answered ▼

Awardee Response *

apple

Submit Response

9. **Submit** Feedback Response

10. **Submit** Progress Report

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 invoice 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	Feedback Type	Feedback	Awardee Feedback Status	Awardee Response
2/28/2023 10:35 AM	Question	What are the Other costs for?	Answered	Costs ▼
3/1/2023 4:06 PM	Question	How many personnel were hired?	Answered	1 person was hired ▼

Upload your invoice in the excel template provided.

No file chosen

Submit

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