



PWI/EPOC Administrative Coaching Call

Presented by: PWI/EPOC AE Team

Behavioral Health Workforce Development

Thursday, September 21, 2023



Agenda



1. Welcome and Introduction
2. Upcoming Submissions
3. Data Collection Guidance
4. Data Collection Software
5. Invoice Templates
6. Program Assessment Sustainability Tool (PSAT) Next Steps
7. Medi-Cal Billing Advocacy
8. Upcoming Events
9. PWI/EPOC Grantee Newsletter
10. Q&A/Open Discussion
11. Attendance Form and Feedback Survey

PWI and EPOC AE Team

Advocates for Human Potential (AHP)



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Upcoming Submissions

The Quarterly Data Report link and invoice templates will be sent via Constant Contact no later than September 30.

Reporting Period: 6/1/23–9/30/23		
Quarterly Data Report	All Grantees	Due no later than 10/15
Round 1 NCE Invoice	Round 1-> Round 2 Grantees	Due no later than 10/15
Round 2 Invoice	All Grantees	Due no later than 10/15

As a reminder, invoices will not be approved until Quarterly Data Reports are submitted and all other deliverables are completed, ensuring the grantee is compliant (e.g., attendance requirement, Implementation Plan updates).

Data Collection Guidance



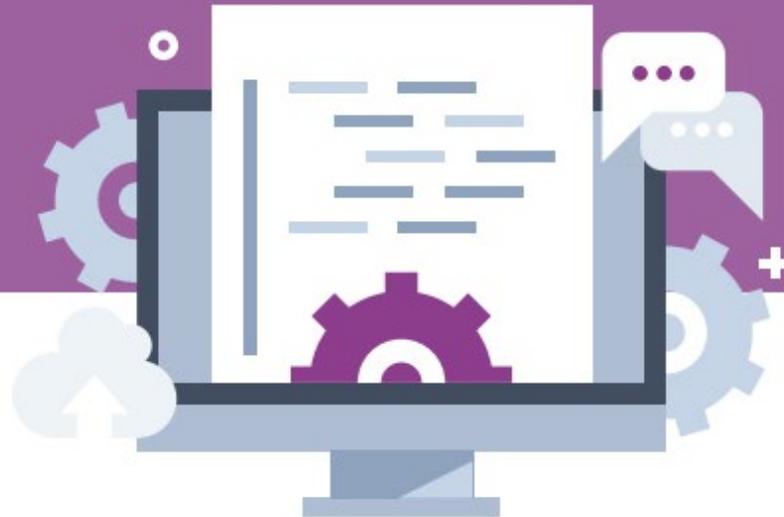
- Quarterly Data Report (QDR) PDF revisions are implemented quarterly in response to direct grantee feedback and do not change the way data is collected.
- Grantees do not need to wait for a revised QDR PDF to prepare and should collect information from the start of the quarter.
- To support data collection, grantees can refer to the most recent [QDR PDF](#) and use the PWI & EPOC Data Collection Tracking Sheet.
- All necessary data should be collected before submissions open at the end of each quarter to decrease the time it takes to complete the QDR online.
- The QDR for reporting period 6/1/23–9/30/23 will be accessible via the [PWI & EPOC Administrative Portal](#) on 9/30.

Data Collection Software

- Grantees can use grant funds to purchase an electronic data tracking and storage platform.
- The BHWD Data Team conducted an electronic health record software comparative analysis in Round 1 that can be referenced by grantees interested in advancing their data collection.

EHR SOFTWARE OPTIONS

Comparative Analysis
Disclaimer and Overview



As the PWI and EPOC grant programs are funded by DHCS, AHP does not formally recommend any one software company to grantees. However, AHP vetted several EHR (electronic health record) and case management software options for grantees to help them in their decision-making process as they search for options to facilitate their data collection and storage needs. Information provided in this comparative analysis was gathered from informal conversations with grantees with experience using the software and/or owners of the software company. Comparisons across companies cover affordability, ease of use, data analytics and reporting capacity, data sharing and data privacy, service tracking, and other features.

Invoice Templates

- All Round 2 invoice templates will be available on the [PWI and EPOC general hub](#) within the next month.
- These will be prepopulated to support grantees with timely submission each quarter.
- As a reminder, invoices cannot be submitted until the first of the month and will not be approved until the QDR and other deliverables are completed.





PSAT Next Steps

- We invite you to join the BHWI initiative at our upcoming “**Introduction to Sustainability Through the PSAT Framework**” webinar presented by [The Center for Public Health Systems Science](#), the creator and owner of the PSAT.
- This will be an *optional* joint webinar for the PWI, EPOC, MIP, and BHRR projects held **Monday, October 2, 2023, from 12 p.m. to 1 p.m.**
- This introductory webinar will orient participants to the concept of program sustainability through the Program Sustainability Framework (eight domains) and the process of completing the PSAT.
- The webinar will be recorded and available for thirty days after the event.
- Even if your organization has already completed the PSAT, this will be an informative session to help build foundational knowledge about sustainability and prepare for next steps using PSAT results.

Medi-Cal Billing Advocacy

- Thank you for including your narratives in our peer support specialist Medi-Cal billing “road-block summary” report for DHCS.
- Until more information is provided on Medi-Cal billing by DHCS, the PWI and EPOC team will be putting together resources to distribute to grantees.
- In the meantime, engage in the following:
 - Advocacy on the county level in your respective locations.
 - Advocacy as a collective through building capacity with other peer-run organizations regionally.
 - Advocacy in the form of a statewide letter, identifying the current barriers and needs.



Upcoming Events

Upcoming Events	Date and Time (PDT)	Required?
Affinity Group: Working with the Reentry and Justice Involved Part 2 ***	Thursday, 9/28/23 12 p.m. to 1:15 p.m.	No
Webinar: Introduction to Sustainability Through the PSAT Framework	Monday, 10/2/23 12 p.m. to 1 p.m.	No
Webinar: Career Ladders and Lattices for Peers in Your Organization	Monday, 10/9/23 12 p.m. to 1 p.m.	Yes (1 representative)
Affinity Group: Recruiting, Retaining, Running Youth Programs Part 2 ***	Thursday, 10/12/23 12 p.m. to 1:15 p.m.	No
Learning Collaborative: Workforce Wellness, Compassion Fatigue, Vicarious Trauma, and Reoccurring Use Management	Wednesday, 10/18/23 1 p.m. to 4 p.m.	Yes (2 representatives)
Administrative Coaching Call	Thursday, 10/26/23 12 p.m. to 1 p.m.	Yes (1 representative)

*** Indicates topic change



To include any upcoming events or relevant resources in the next **PWI and EPOC Grantee Newsletter**, please contact ca_bhwd@ahpnet.com.

Q&A





Please fill out the attendance form and feedback survey in the chat to meet your requirements for today's event!



Thank You