

COMMONWEALTH OF MASSACHUSETTS
HEALTH POLICY COMMISSION

COMMUNITY HOSPITAL ACCELERATION, REVITALIZATION,
& TRANSFORMATION INVESTMENTS

*CHARTING A COURSE FOR THE RIGHT CARE AT
THE RIGHT TIME IN THE RIGHT PLACE*

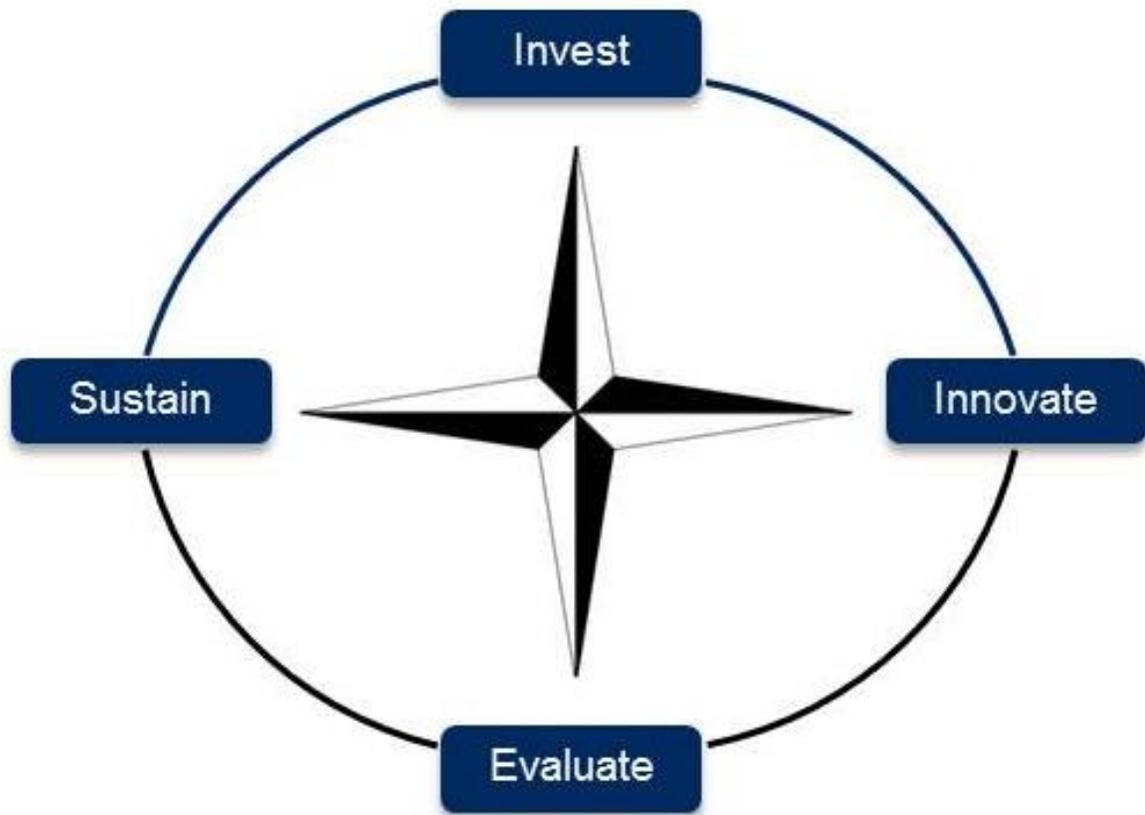


CHART PHASE 2 PORTAL
PROPOSAL SUBMISSION GUIDE



This document is a basic guide for navigating the online Portal to submit Proposals for Phase 2 Investment Funds. This guide is not exhaustive. If you have any questions after reading this guide, logging on to the Portal, and working through these instructions, please email the HPC at HPC-CHART@state.ma.us. All documents related to the HPC CHART Phase 2 RFP including this Guide can be found on the [HPC CHART Phase 2 webpage](#).

An initial contact person, designated by each CHART Hospital on 8/27/14, will receive their own unique login credentials for the Portal on 9/3/14. The Portal sign in link and login information will come from hpc-chart@gdg.do on behalf of HPC-CHART@state.ma.us. Once the initial contact person logs in to the Portal, they will be able to invite additional collaborators to work on Proposals.

You will be able to complete a Proposal submission in multiple sessions, but collaborators must always click on the “Save and Continue” button to save new information added to a Proposal.

Hospital Proposal Pre-Work

PLEASE READ CAREFULLY THOUGH THIS ENTIRE GUIDE BEFORE STARTING YOUR PROPOSAL SUBMISSION

Before submitting your CHART Phase 2 Proposal via the Portal, you will need to have completed and ready for upload the following Proposal elements, and have done the necessary checks.

- Proposal (one electronic copy, regardless of the number of Applicant CHART Hospitals), including:
- Authorizing Cover Letter(s) (signed by a President, CEO, or Board Chair from each Applicant CHART Hospital)
- Operational Response, including:
 - Abstract
 - Aim Statement
 - Community Partnership(s)
 - Defined Need
 - Driver Diagram
 - Enabling Technologies, including:
 - [Mass HIway participation](#) (if using this form, download and save before completing PDF; does not contribute to 20 page limit of the Operational Response)
 - Expected Impact of Initiative
 - Hospital Partnership(s)
 - Initiative(s)
 - Organizational, Clinical, and Operational Leadership
 - Regulatory Barriers (as applicable)
 - Staffing Model (narrative), including Investment Director resumes (*Resumes should be separate documents ready to upload*)
 - Strategic Planning
 - Target Population
- Financial Response, including:
 - Completed Budget Proposal Template
 - Budget Narrative
- Impact Estimate, with accompanying narrative describing data sources and modifications to the template
- Metric Identification
- Mandatory Forms and Certifications, *one set per Applicant CHART Hospital*, Attachment C (1-6, excluding 5):
 1. Commonwealth Terms & Conditions
 2. Commonwealth Standard Contract Form
 3. Request for Taxpayer Identification Number and Certification (W-9)
 4. Contractor Authorized Signatory Listing (must be notarized)
 5. ~~Authorization for Electronic Funds Transfer Form~~ (***Not to be uploaded online, hard copy only***)
 6. Certification Regarding Debarment and Suspension
- System contribution is included for Applicant CHART Hospitals owned by a system with a Major Teaching Hospital
- Authorizing Cover Letter and all Mandatory Forms and Certifications are signed by authorized signatories listed on the Contractor Authorized Signatory Listing form

Applicant funding requests are no greater than \$6M total per Applicant CHART Hospital, across all Proposals

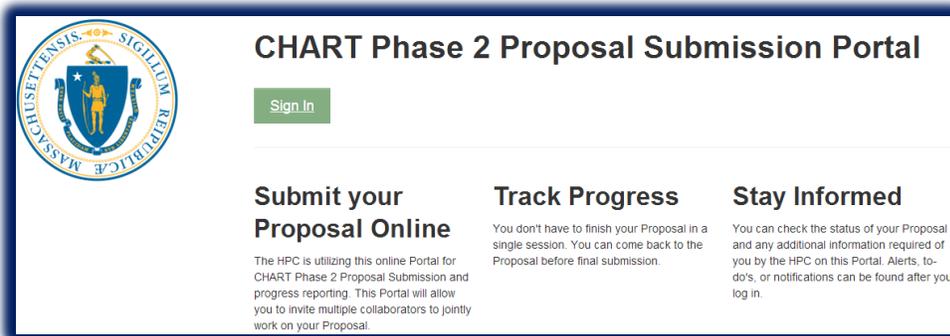
Hospital Proposal Pre-Work (cont.)

You will need the following information to successfully complete online Portal required fields:

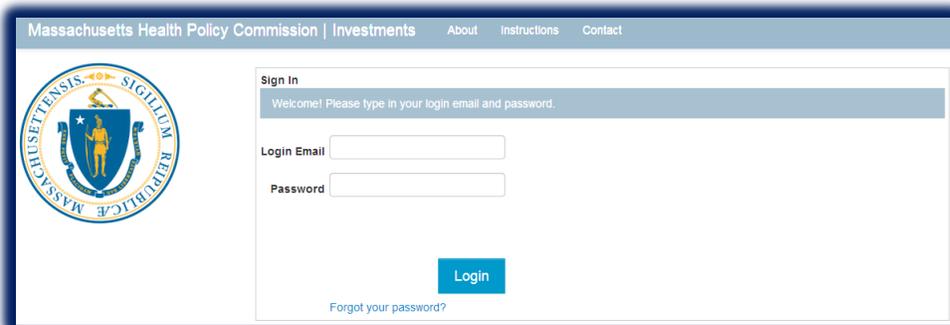
- A title for your Proposal
- Amount requested from the HPC
- Hospital address(es)
- Be prepared to attest to your commitment to connect and utilize the Mass HIway
- For each Clinical Investment Director and Operational Investment Director:
 - Name
 - Email address
 - Phone number
 - Assistant (if applicable)
 - Name
 - Email address
 - Phone number
 - Brief description of role and qualifications
- Abstract from Operational Response (likely under 800 words; exceeding 800 words will not negatively impact your Proposal)
- Aim Statement from Operational Response (likely 100 words; exceeding 100 words will not negatively impact your Proposal)
- Documents from the above checklist

Step 1 – Signing In and Changing Password

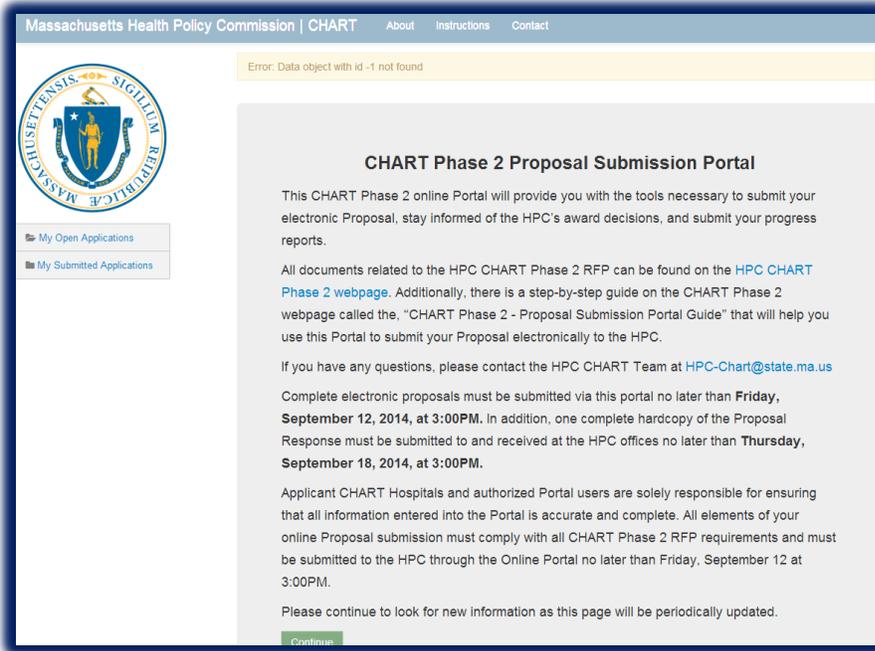
a. Use the link from your invitation email (subject: CHART Phase 2 Welcome to the Proposal Submission Portal) to open the Applicant Portal.



b. Sign in with the credentials provided in your invitation email.

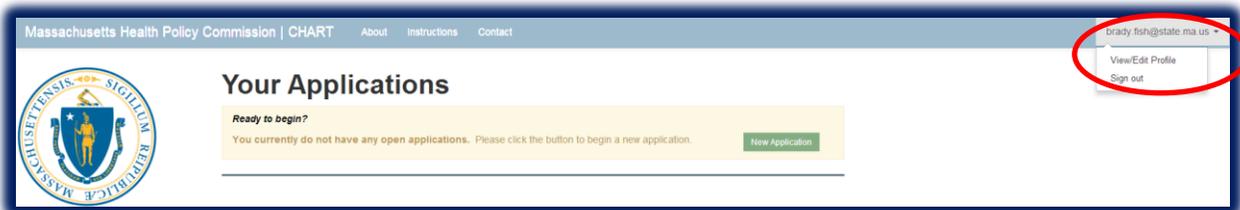


c. This is the welcome page. Please read and click “Continue.”



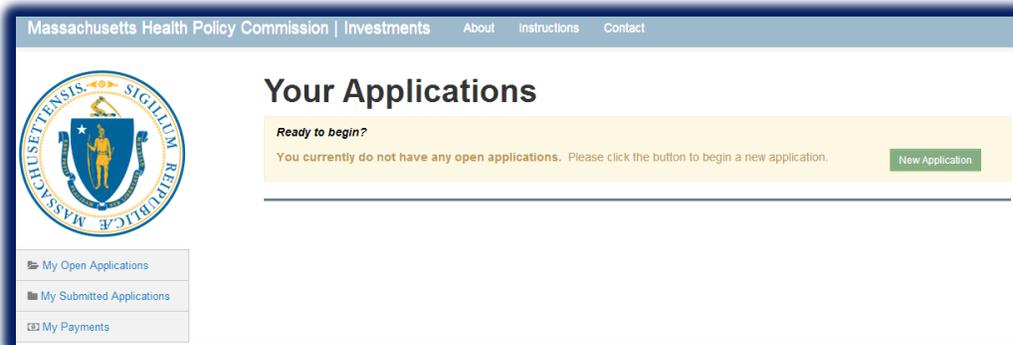
d. **IMPORTANT: Please change your password.**

- i. Do so by clicking on your username in the upper right corner of your screen
- ii. Select, “View/Edit Profile”
- iii. Click “Edit Profile”
- iv. Enter a new password, confirm password, and save by clicking “Save” at the bottom of the page
- v. Return to the “Your Applications” page by clicking on “My Open Applications” on the left



Step 2 – Creating a New Proposal

a. For your first time signing in, click on “New Application” to start the Proposal process.



- i. If another collaborator has already started a Proposal, click on “Edit” to open the Proposal under “Requests” and skip to Step 4 of this Guide

Your Applications

Note: You have already started an application. If you would like to start a new application, please click here [New Application](#)

Below you will find a list of your currently in progress applications. You do not have to complete your applications in a single session, but may return here at any time to continue working on them.

Note: The colleague functions allow you to invite a person to work with you on the same application. Hover over the options for further instructions.

No records to display.

Requests

Open Requests 1-1 of 1

Action	Colleagues	Request	Amount Requested	Workflow Status	Date Submitted
Edit View Add New		Test	\$1,000,000.00	Draft	

- b. Select the number of CHART Hospitals for which you are creating the Proposal and click “Save and Continue”
 - i. The “Preview Button” will bring you to this Proposal Portal Guide

New Request | Select Investment Program

Currently Open Investment Programs

- CHART Phase 2 - 1 Hospital Proposal Submission [Preview](#)
- CHART Phase 2 - 2 Hospital Proposal Submission [Preview](#)
- CHART Phase 2 - 3 Hospital Proposal Submission [Preview](#)
- CHART Phase 2 - 4 Hospital Proposal Submission [Preview](#)
- CHART Phase 2 - 5 Hospital Proposal Submission [Preview](#)

- c. To start any additional Proposals (e.g., Your CHART Hospital is a party to both a single and joint Proposal), click on “My Open Applications” on the left of your screen
 - i. Once you have clicked on “My Open Applications” it will take you back to the page where you can select “New Application” and start the process of creating a new Proposal over again.

Your Applications

Request "Request" has been created.

Note: You have already started an application. If you would like to start a new application, please click here [New Application](#)

Below you will find a list of your currently in progress applications. You do not have to complete your applications in a single session, but may return here at any time to continue working on them.

Note: The colleague functions allow you to invite a person to work with you on the same application. Hover over the options for further instructions.

No records to display.

Requests

Open Requests 1-1 of 1

Action	Colleagues	Request	Amount Requested	Workflow Status	Date Submitted
Edit Del View Add New		Request		Draft	

Step 3 – Inviting Collaborators

IMPORTANT: After you have clicked “Save and Continue” after creating a new Proposal, follow the next steps to add collaborators.

- a. Click on “My Open Applications” on the left of the screen and add collaborators by selecting “Add New.”

The screenshot shows a web interface titled "Requests". At the top, it says "Open Requests 1-1 of 1" with navigation arrows. Below is a table with columns: Action, Colleagues, Request, Amount Requested, Workflow Status, and Date Submitted. A single row is visible for "CHART Phase 2 - Joint Application for 2 Hospitals". In the "Action" column, there are buttons for "Edit", "Del", "View", "Add New" (circled in red), and "Add Existing". The "Request" column contains the text "Request", and the "Workflow Status" column contains "Draft". Below the table, a message states "Submitted applications cannot be edited."

- b. Add Colleagues to the Proposal by filling in their contact information. This can be done as many times as necessary.

The screenshot shows a form titled "Add Colleague To Request". It contains three input fields: "First Name", "Last Name" (with an asterisk), and "Login Email" (with an asterisk). A blue "Save" button is located at the bottom right of the form.

- c. Return to your Proposal after inviting collaborators by clicking, “Edit.”

This screenshot is identical to the one in step 3a, showing the "Requests" table. In this instance, the "Edit" button in the "Action" column for the "CHART Phase 2 - Joint Application for 2 Hospitals" row is circled in red.

Step 4 – Entering Information

- a. Provide a descriptive title for your Proposal and precise amount requested from the HPC.

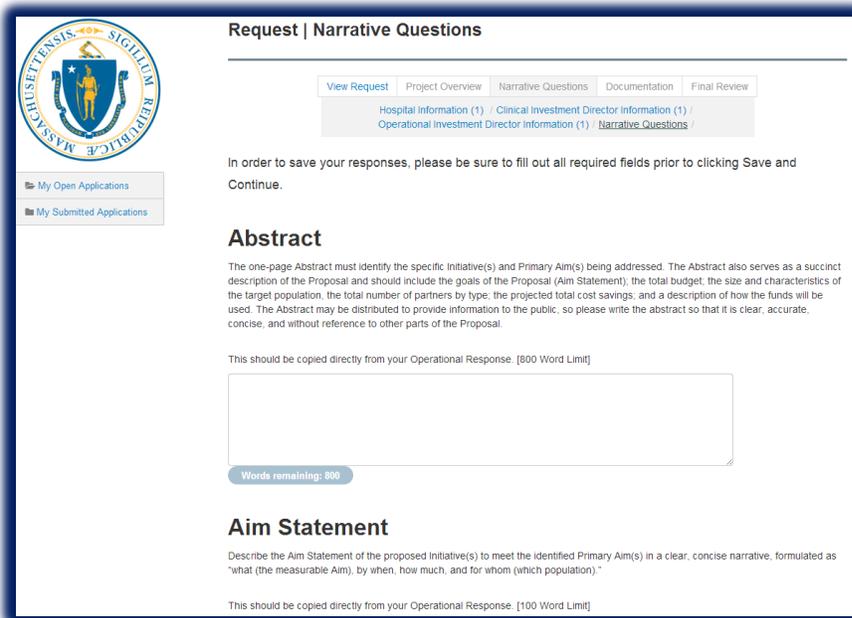
The screenshot shows a web interface titled "Request | Project Overview". On the left is a sidebar with the Massachusetts State Seal and two menu items: "My Open Applications" and "My Submitted Applications". The main content area has a breadcrumb trail: "View Request" | "Project Overview" | "Narrative Questions" | "Documentation" | "Final Review". Below the breadcrumb, a message reads: "In order to save your responses, please be sure to fill out all required fields prior to clicking Save and Continue." There are two required input fields: "Proposal Title*" and "Amount Requested*", both with red vertical bars on the left side of the input boxes.

- b. Enter the appropriate information for each CHART Hospital participating in the Proposal, including:**
 - i. Hospital-specific information (Name and Address)
 - ii. The Clinical Investment Director’s contact information
 - iii. The Operational Investment Director’s contact information (First and last name if same as Clinical)
 - iv. Answer three questions attesting a commitment to connect to and use the Mass HIway
 - v. The two narrative questions, the Abstract and the Aim Statement, should be copied directly from the Operational Response.



Step 5 – Narrative Questions and Document Upload

- a. The Abstract and the Aim Statement should be copied directly from your Operational Response.**
 - i. The word count is a guideline and if exceeded, will not negatively impact your Proposal



- b. The Documentation page allows you to upload required documents from your computer.**
 - i. For a Hospital-specific Proposal submission, one Authorizing Cover Letter is needed
 - ii. For a Joint Hospital Proposal, there may be multiple Authorizing Cover Letters and you may keep clicking “Add Document” to add a Cover Letter for each Hospital
 - iii. Each CHART Hospital will need to upload one of each of the “Attachment C” documents
 - iv. Each CHART Hospital will need to upload at least one “Mass HIway Use Case” document, if using.
 - v. You can add each document for each Hospital by clicking “Add Document.”

Step 6 – Final Submission

- a. You will have the opportunity to review your Proposal before submitting, and you may edit if necessary.

- b. You will need to do on final attestation that the Proposal is complete before final submission.

WARNING: Once you submit this page, you will no longer be able to edit your Proposal

Next Steps

This Portal will be also used for tracking your award and providing progress reports to the HPC