

## Meeting Minutes - CDC Invoicing & Reporting Training for Health Councils - 10/29/21

### Agenda

1. Welcome and Introductions
2. Procedure form
3. Invoicing
4. Monthly Reporting form
5. Q&A

### [Link to folder with Invoicing and Reporting Materials](#)

**NOTE: If you are having trouble accessing any of the documents linked in this document, send a request to [madeline@nmhealthcouncils.org](mailto:madeline@nmhealthcouncils.org)**

### Minutes

#### **Procedure Form**

1. Access the procedure [form for invoicing and reporting here](#)

#### **Invoicing**

1. Send your monthly invoice to Madeline Bremel, NMAHC Executive Assistant, [madeline@nmhealthcouncils.org](mailto:madeline@nmhealthcouncils.org)
2. Madeline will make sure most of the boxes in your invoice form are pre-filled (dates, monthly reporting period amount, fiscal agent name and address)
  - a. You should check to make sure they are correct
3. There may be additional reports that you will need to submit in some months (in addition to your Monthly Report). If this is the case, you will be sent these forms in advance, and they will be listed on your invoice for the respective month.
4. Invoice checklist - the following items should be completed on your invoice in order to have it approved:
  - a. Signed
  - b. Dated
  - c. Correct invoicing period
  - d. Listed fiscal agent
  - e. Listed fiscal agent address
  - f. Monthly Reporting Form completed

#### **Monthly Reporting Form**

1. Access a pdf copy of the [Monthly Reporting Form here](#)
2. Please submit your Monthly Reporting Form using the [Google Forms link](#), unless you do not have access to Google Forms.
  - a. If you do not have access to Google Forms, please request a Word Document version of the form from [susie@nmhealthcouncils.org](mailto:susie@nmhealthcouncils.org)

3. Susie will check-in with Health Councils monthly to discuss reporting, goals and progress. Any information that needs clarification from your reporting forms can be discussed at these meetings
  - a. Susie will follow up with health councils individually to ask what format they would like their check-ins.

## Q&A

1. How will payment be received: check or direct deposit?
  - a. You will be paid via check
2. Can you bill for more than 2 months?
  - a. You can. But you can only bill for previous months. You cannot bill in advance.
  - b. Please submit your invoices and reports for a single month whenever possible. We need the information for reporting.
  - c. If you are still waiting for an approved contract, and are not able to submit your invoice, it would be very helpful to still submit your reporting forms anyway.
3. How does the frequency of committee meetings affect invoicing and reporting?
  - a. You can still submit your invoices and reports regardless of when your meetings happen, how frequently, and which committees are meeting
4. When will invoice materials be sent out each month?
  - a. Madeline will send materials with at least 1 week's notice before they are due on the 5th of each month
5. Can I still fill out my monthly reporting form if I haven't completed my contract yet and can't submit an invoice?
  - a. Yes. We would strongly encourage you to do this, although it is not required.
  - b. Note: you cannot submit multiple months of work in one Monthly Reporting Form. If you are submitting more than one month worth of work at one time, please fill out a different Monthly Reporting Form for each month
6. What activities should councils report on in the Monthly Reporting Form?
  - a. This will change month-by-month. Right now all health councils have been asked to do is contract, attend orientation, attend the hiring workshop and the invoice workshop
  - b. You can also use the scope of work for your health council tier as a guide ([tier 1 summary](#), [tier 2 summary](#), [tier 3 summary](#))
7. What if I don't have activities to report in some categories of the Monthly Reporting Form?
  - a. That is okay and expected. You will have the opportunity to discuss this with Susie in your monthly check-ins
8. Do I have to use a Gmail account to access the monthly reporting form?
  - a. No, you can access the form from any email account. We would prefer you use the email associated with your health council.
9. How should we avoid "double dipping" with respect to reporting activities on our Monthly Reporting Form.
  - a. There may be some overlap, but it shouldn't be perceived as double dipping. Report the things that are connected with the activities for vaccine equity and community rebuilding

10. Request from DOH Health Promotion Program Managers: When you submit your Monthly Reporting Form, please also forward this form to your DOH Health Promotion team member for your region. This will streamline reporting.
  - a. Perhaps it would be easier for NMAHC to forward all completed forms together to DOH Program Managers?
11. Will health councils see the reports of their work quarterly or bi-annually?
  - a. Perhaps, Susie will work on a way to make this possible. Please stay tuned.
  - b. It would also be helpful for health councils to see the progress of other health councils, so they can learn from each other.
  - c. This will be very helpful for health councils to use in any other annually reporting they need to do.
12. What is the deadline for turning in a W-9 to be able to submit an invoice for October?
  - a. Contact Marissa Tecca ([mtecca@chi-phi.org](mailto:mtecca@chi-phi.org)) and Lucinda Tecca ([ltecca@chi-phi.org](mailto:ltecca@chi-phi.org)). They may be able to get you in on time.

[Link to chat](#)