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# **Rural Health Transformation Program**

**Expenditure Report Walkthrough**  
**October 19, 2026**

# Teams Meeting Tips

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## **Use chat to ask questions.**

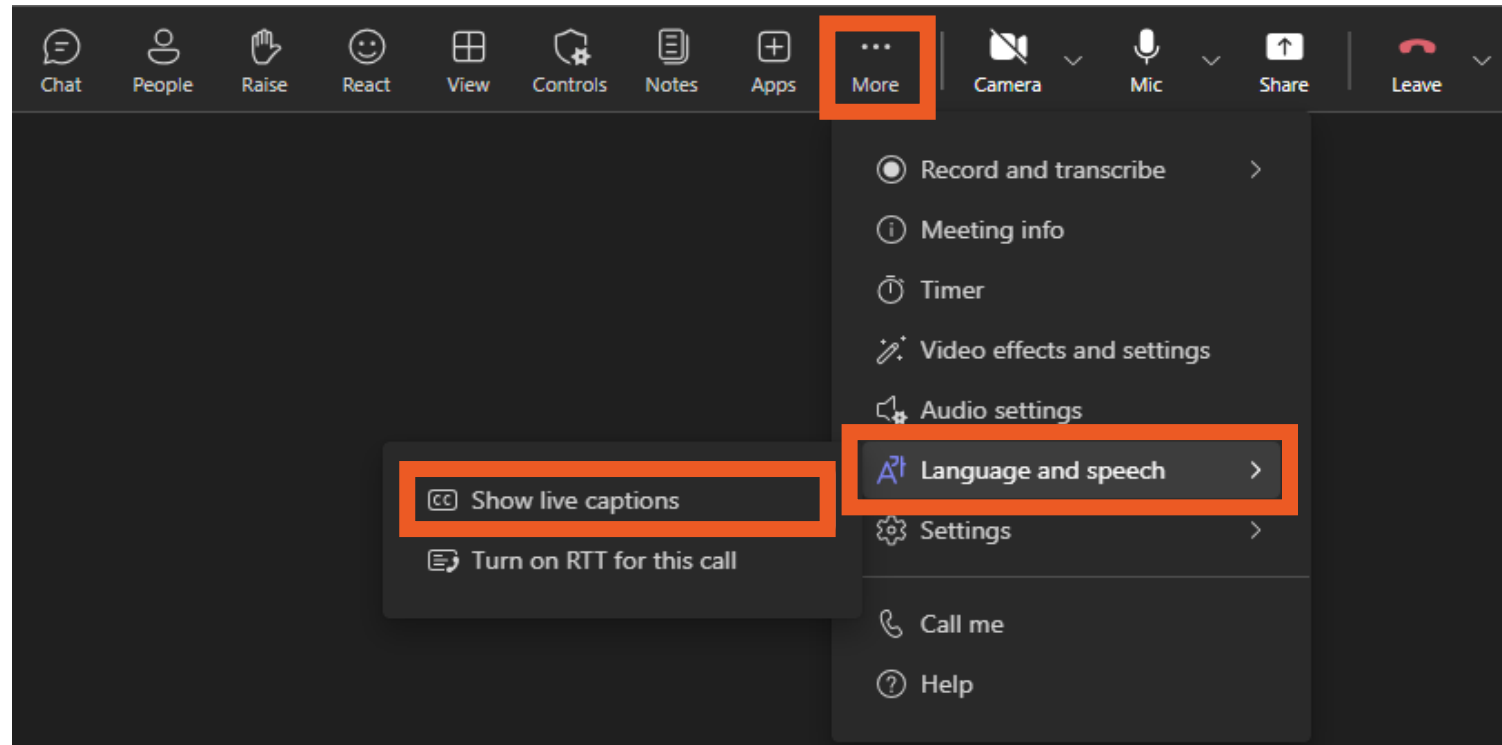
- We'd like this session to be interactive, so we'll be saving the chat.
- If you want to ask a question verbally, feel free to raise your hand.

## **This webinar is being recorded.**

- We'll share it with participants after the presentation.

# Teams Meeting Tips

For live captioning, please click on "More" at the top of your screen, then select "Language and Speech" and "Show live captions"





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### **Disclaimer:**

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# Today's session

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- Smartsheet receipt and submission of your expenditure report demonstration (Claire Schulz, RHTP Project Manager)
- Reporting dates and the templates you will receive (Shelly Huber, RHTP Grant Budget Compliance Lead)
- Expenditure Report demonstration (Shelly Huber, RHTP Grant Budget Compliance Lead)
- Q & A (Shelly Huber, RHTP Grant Budget Compliance Lead & Yudi Liu, RHTP Chief of Staff)

This reporting applies to awardees that receive disbursements, not those that invoice for incurred costs.



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**Receiving & Submitting your  
Expenditure Report with Smartsheet**  
Claire Schulz, RHTP Project Manager

# Expenditure Report Overview

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- Your report will come from an email generated from Smartsheet
- When you are ready to submit, use the Smartsheet link provided in the initial email. This opens a submission form.
- Complete the spreadsheet, save and upload your completed workbook.
- Submit by EOD Friday November 6, 2026.
- Complete this process for each project/budget workbook you receive.
- There is one expenditure report per project. If your agreement has more than one project, you will receive more than one report. Be sure to fill out all reports you receive and submit them.
- You may have more than one tab per report depending on your start date. Be sure to complete ***all*** dated tabs.
- If you have no expenditures to report leave the line blank.
- Do not report an expenditure in more than one place or on more than one tab. Each expenditure should only be reported once in the appropriate tab and workbook.



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# **Completing your Expenditure Report**

Shelly Huber, RHTP Grant Budget

Compliance Lead

# Review your Expenditure Reports

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- Review for completeness: this is your only opportunity to report expenditures in the period of January 1, 2026 to October 30, 2026.
- Be sure you have completed all reporting tabs within your report.
- Approved budget limits: your report includes your approved budget amounts costs should not exceed these without OHA prior approval.
- Be sure your file is saved with your expenditure information so that you upload a completed report.
- Only use templates provided by OHA.

# Next steps

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- Expenditure reports are being sent out through today. All entities will receive their expenditure report template by tomorrow at noon at the latest.
- Your designated contact will receive a customized expenditure-reporting workbook for each project under your organizations award.



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**Questions?**

# Home page and newsletter

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Visit our home page:

<https://www.oregon.gov/oha/hpa/hp/pages/rural-health-transformation.aspx>



- This QR code will take you to the RHTP home page

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- This QR code will take you to the sign-up sheet for the RHTP newsletter



**Thank you**