CSBG Eligible Entity Master List
CSBG State Plan FY2019

Office of Community Services (OCS)
Division of Community Assistance (DCA)
Community Services Block Grant (CSBG)
July 30, 2018
Welcome!
Today’s Focus

• Action Transmittal 02-2018
• CSBG Eligible Entity Master List
Heads up!

The CSBG State Plan Opens: Wednesday, August 15, 2018
Reminder…

All Plans Due:
Saturday, September 1, 2018
CSBG State Plan Background Refresher
CSBG State Plan Overview

• Approved by Office of Management and Budget (OMB) and implemented in FY 2016
• Received new OMB Clearance July 2, 2018 for 3 years
• Revised and automated CSBG State Plan
  – Incorporates the 3 performance management efforts
  – Accessed through ACF’s Online Data Collection System (OLDC)
  – Increases efficiency, improves data analysis
CSBG State Plan Content Areas

1. CSBG Cover Page (SF-424M)
2. Section 1: CSBG Administrative Information
3. Section 2: State Legislation and Regulation
4. Section 3: State Plan Development and Statewide Goals
5. Section 4: CSBG Hearing Requirements
6. Section 5: CSBG Eligible Entities
7. Section 6: Organizational Standards for Eligible Entities
8. Section 7: State Use of Funds
9. Section 8: State Training and Technical Assistance
10. Section 9: State Linkages and Communication
11. Section 10: Monitoring, Corrective Action, and Fiscal Controls
12. Section 11: Eligible Entity Tripartite Board
13. Section 12: Individual and Community Income Eligibility Requirements
14. Section 13: Results Oriented Management and Accountability (ROMA) System
15. Section 14: CSBG Programmatic Assurances and Information Narrative
16. Section 15: Federal Certifications
CSBG State Plan Submission Groups

- All states have submitted a plan at least once.
- Two submission groups this year:

<table>
<thead>
<tr>
<th>GROUP A</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following states are required to submit a one- or two-year plan for FY2019:</td>
</tr>
<tr>
<td>Alaska, District of Columbia, Massachusetts, New Jersey, Utah</td>
</tr>
<tr>
<td>Alabama, Florida, Michigan, Oregon, Vermont</td>
</tr>
<tr>
<td>Arizona, Georgia, Mississippi, Puerto Rico, Virginia</td>
</tr>
<tr>
<td>Connecticut, Kansas, Nebraska, South Carolina, Washington State,</td>
</tr>
<tr>
<td>Delaware, Maryland, New Hampshire, South Dakota, Wyoming</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GROUP B</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following states are required to submit a SF-424M for FY2019, but may submit an update to their currently accepted plan:</td>
</tr>
<tr>
<td>Arkansas, Illinois, Maine, New Mexico, Oklahoma, West Virginia</td>
</tr>
<tr>
<td>California, Indiana, Minnesota, New York, Pennsylvania, Wisconsin</td>
</tr>
<tr>
<td>Colorado, Iowa, Missouri, North Carolina, Rhode Island</td>
</tr>
<tr>
<td>Hawaii, Kentucky, Montana, North Dakota, Tennessee, Idaho</td>
</tr>
<tr>
<td>Louisiana, Nevada, Ohio, Texas</td>
</tr>
</tbody>
</table>
Group A: States with Accepted One- or Two-Year Plans: Ending FY 2018

- States with accepted one- or two-year plans ending September 30, 2018
- States (25) must complete the CSBG Eligible Entity Master List and a new plan
- The plan will be subject to all requirements of the CSBG Act, including the public hearing requirement
Group B: States with Accepted Two-Year Plans: End FY 2019

- States with accepted two-year plans ending September 30, 2019:
  
  - **Option 1**: Solely complete the CSBG Eligible Entity Master List and the SF-424M as separate forms through OLDC.
  
  - **Option 2**: Complete the CSBG Eligible Entity Master List and submit revisions to the CSBG State Plan. Must include the appropriate designee to certify the report.
OCS Guidance

- Action Transmittal (AT) 2018-02, Application for FY2019 Funds for State and Territories (based on the availability of CSBG funds)
  - Released July 27, 2018
Elements of a CSBG State Plan

• A new complete plan includes:
  1. The CSBG Eligible Entity Master List (a new form available in OLDC);
  2. The Standard Form for Federal Assistance (SF-424M) [the cover page of the CSBG State Plan];
  3. CSBG State Plan Sections 1 – 14; and
  4. Certifications as defined by CSBG Statute (Section 15 of the CSBG State Plan).
CSBG Eligible Entity Master List Background
What is the CSBG Eligible Entity Master List?

- CSBG Eligible Entity Master List consists of:
  - Each Eligible Entity
    - Doing Business As Name (if applicable)
  - DUNS number
  - Public or Non-Profit
  - Address
  - Geographical Area Served
How do States Benefit from the CSBG Eligible Entity Master List?

• It allows for…
  – Linkage to State Plan, Section 5
  – Linkage to Module 1, Section C
  – Linkage to Modules 2 and 4
  – A more succinct method for collecting and storing eligible entity information for your state
  – Only requires an update when there is change
Elements of the CSBG Eligible Entity Master List

• All states must complete the Eligible Entity Master List at least once
  – Implementation: FY 2019 CSBG State Plan
  – Submission: CSBG State Plan due date (FY 2019 – September 1, 2018)

• Only requires re-submission when there is a change to eligible entity list

• The form does not require certification
On the bright side…

The CSBG Eligible Entity Master List Opens: Thursday, August 2, 2018
Completing the CSBG Eligible Entity Master List
This training is done from the Enhanced Home Page. If when you log-in your screen looks like this, click Switch Home Page (Enhanced) in order to switch to the Enhance Home Page.
The *Enhanced Home Page* allows easier access to your *Recent Activity*. 
To start: Select **Report Form Entry**
Step 1: Program Name – Select **Community Services Block Grant**

Step 2: Grantee Name – Select **your state** (this will be your only option)

Step 3: Report Name – Select **CSBG Eligible Entity Master List (CSBG-Master List)**
Step 4: Select Action – Select **New** (your only option)

Then click **Enter**
Report Description will pop-up

Enter “Your State – EE Master List”

Then click Create Report
Report Sections

Under **Perform Action** – Select “**Edit Section**”

Then click **Go**
To add a new Entity – Click **Add Eligible Entity**

**NOTE:** Do not Add your eligible entity list as an attachment. This will not be accepted or allow for linkage to the State Plan nor Annual Report.
This message from webpage will pop-up every time you select Add New Eligible Entity

Click OK

*NOTE: No changes can be made from this screen, so there is no need to hit “Save”*
## Community Services Block Grant (CSBG) Model State Plan Eligible Entities Master List

**Notes:** Whether nonprofit or public, entities that receive CSBG funds are generally considered to be Community Action Agencies for the purpose of administering CSBG. The only specific exceptions outlined in the CSBG Act are **Section 677** of the CSBG Act.

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>DUNS #</td>
<td></td>
</tr>
<tr>
<td>CSBG Eligible Entity Official Name</td>
<td></td>
</tr>
<tr>
<td>CSBG Eligible Entity DBA</td>
<td></td>
</tr>
<tr>
<td>Street Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Zip Code</td>
<td></td>
</tr>
<tr>
<td>Geographical Area</td>
<td></td>
</tr>
<tr>
<td>Public or Non-profit</td>
<td>Select</td>
</tr>
<tr>
<td>Type of Entity</td>
<td></td>
</tr>
</tbody>
</table>

### Type of Entity Options
- Community Action Agency
- Limited Purpose Agency
- Migrant or Seasonal Farmworker Organization
- Tribe or Tribal Organization

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**Iterative Form**

Note: each *Data Element* is clickable and will provide more information on what is requested as a response.
The DUNS # refers to the official Data Universal Numbering System and should be the official DUNS # registered to the eligible entity.

**This should be 9 digits.**
CSBG Eligible Entity Official Name

Provide the official eligible entity name as it is associated with the DUNS #.

Do not include any additional information in this text box, this includes but is not limited to an acronym or more commonly known name.

RIGHT: Office of Community Services
WRONG: Office of Community Services (OCS)
CSBG Eligible Entity DBA

Provide ONLY the acronym or more commonly known name.

This is the only field that is **not** required. This field will not link to any other form, but may be useful to your program specialist.

**RIGHT: OCS**

**WRONG: Office of Community Services (OCS)**
Street Address

Provide the official street address for the eligible entity as it is associated with the DUNS #.

Only include the:
- Street Number
- Street Name (no abbreviations)
- Suite/Office/Floor Number (as applicable)
### Note:
Whether nonprofit or public, entities that receive CSBG funds are generally considered to be Community Action Agencies for the purpose of administering CSBG. The only specific exceptions outlined in the CSBG Act are Section 677 of the CSBG Act.

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<tbody>
<tr>
<td>DUNS #</td>
<td>123456789</td>
</tr>
<tr>
<td>CSBG Eligible Entity Official Name</td>
<td>Test Eligible Entity 1</td>
</tr>
<tr>
<td>CSBG Eligible Entity DBA</td>
<td>Test1</td>
</tr>
<tr>
<td>Street Address</td>
<td>123 Main Street</td>
</tr>
<tr>
<td>City</td>
<td>Sacramento</td>
</tr>
<tr>
<td>State</td>
<td>California</td>
</tr>
<tr>
<td>Zip Code</td>
<td>12345</td>
</tr>
<tr>
<td>Geographical Area</td>
<td>Montgomery County</td>
</tr>
<tr>
<td>Public or Non-profit</td>
<td>Public</td>
</tr>
<tr>
<td>Type of Entity</td>
<td>Community Action Agency</td>
</tr>
<tr>
<td></td>
<td>Limited Purpose Agency</td>
</tr>
<tr>
<td></td>
<td>Migrant or Seasonal Farmworker Organization</td>
</tr>
<tr>
<td></td>
<td>Tribe or Tribal Organization</td>
</tr>
</tbody>
</table>

**City**

Provide the official city for the eligible entity as it is associated with the DUNS #.
State

Select the official state for the eligible entity as it is associated with the DUNS #.

This should be your state.
Provide the official zip code for the eligible entity as it is associated with the DUNS #.

This should be 5 digits.
Geographical Area

Provide the Geographical Area(s) served by the eligible entity.
Please provide the accurate name for each area served. Each “area” should be separated by commas or semi-colons.

**RIGHT:** Montgomery County, Prince Georges County

**WRONG:** Counties of: Montgomery and Prince Georges

This is important for the upcoming CSBG Performance Management site
Public or Non-profit

Select whether this is a public or non-profit eligible entity.

Only one option can be selected.
## Type of Entity

Select the type(s) of entity for this eligible entity. Options include:

- Community Action Agency
- Limited Purpose Agency
- Migrant or Seasonal Farmworker Organization
- Tribe or Tribal Organization

*To select multiple options, hold down the CTRL button while making your selections.*
Type of Entity

If the eligible entity does not fit under one of the types listed, select Community Action Agency.

Whether nonprofit or public, entities that receive CSBG funds are generally considered to be CAAs for the purpose of administering CSBG. The only specific exceptions outlined in the CSBG Act are Section 677 of the CSBG Act.

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<td>Test Eligible Entity 1</td>
</tr>
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</tr>
<tr>
<td>State</td>
<td>California</td>
</tr>
<tr>
<td>Zip Code</td>
<td>12345</td>
</tr>
<tr>
<td>Geographical Area</td>
<td>Montgomery County</td>
</tr>
<tr>
<td>Public or Non-profit</td>
<td>Public</td>
</tr>
<tr>
<td>Type of Entity</td>
<td>Community Action Agency, Limited Purpose Agency, Migrant or Seasonal Farmworker Organization, Tribe or Tribal Organization</td>
</tr>
</tbody>
</table>
After you are done with each entity, select **Validate** at the bottom or top of the screen.
If there are no errors, the screen will reload and you will see the Official Name and DUNS Number at the top of the form.

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### Community Services Block Grant (CSBG)
#### Model State Plan
##### Eligible Entities Master List

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<tr>
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<td>123456789</td>
</tr>
</tbody>
</table>
If there are errors, the screen will reload and you will see the errors listed in **RED**. Click on the *Long Description* for additional details. *GoToError* will take you to the question.

**EXAMPLE OF ERROR MESSAGE**
Once you have responded to each error, you must select *Validate* again and the errors will clear.

To add the next eligible entity, select **Go to Main** and start the process again. Repeat until all eligible entities have been entered.
Once you have completed entering all eligible entities, select **Validate** from the Main screen.

<table>
<thead>
<tr>
<th>DUNS #</th>
<th>CSBG Eligible Entity Official Name</th>
<th>Geographical Area</th>
<th>Public or Non-profit</th>
<th>Type of Entity</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>Test Eligible Entity 1</td>
<td>Montgomery County</td>
<td>Public</td>
<td>Community Action Agency</td>
<td>Saved -- Validated</td>
<td><img src="" alt=" " /></td>
</tr>
<tr>
<td>123456789</td>
<td>Test Eligible Entity 2</td>
<td>Prince Georges County, Allegany County</td>
<td>Non-Profit</td>
<td>Community Action Agency</td>
<td>Saved -- Validated</td>
<td><img src="" alt=" " /></td>
</tr>
<tr>
<td>345678901</td>
<td>Test Eligible Entity 1</td>
<td>Arlington</td>
<td>Public</td>
<td>Community Action Agency/Limited Purpose Agency</td>
<td>Saved</td>
<td><img src="" alt=" " /></td>
</tr>
</tbody>
</table>
There are three possible errors.

All Eligible Entities are not validated.
Duplicate DUNS Number.
Duplicate Eligible Entity.
All Eligible Entities are not validated.

This means that one of the eligible entities have not been validated.

To fix:
• Select the correlating DUNS #
• Click Validate within the form specific to that eligible entity
• Then select Go To Main to return
Duplicate DUNS Number.

This means that two or more of the eligible entities have the same DUNS number.

To fix:
- Review the DUNS # of each eligible entity in the first column.
- When you find the duplicate DUNS #, select the correlating DUNS # of the entity that needs to be updated.
- The specific eligible entity form will populate.
- Edit the DUNS #, Validate, and then select Go To Main to return.
Duplicate Eligible Entity

This means that two or more of the eligible entities have the same Official Name.

To fix:
• Review the Official Name of each eligible entity in the second column
• When you find the duplicate eligible entity:

Option 1: If it’s an accidental duplicate, delete by selecting the red X under the Actions column.
Duplicate Eligible Entity

This means that two or more of the eligible entities have the same Official Name.

To fix:

Option 2: If it’s not an accidental duplicate, select the correlating DUNS # of the entity that needs to be updated.

- Edit the Official Name, Validate, and then select Go To Main to return.
Once you have responded to all the errors, re-Validate.

Now you are ready to submit.

Select *Report Sections* towards the top of the screen, and select *Go To Report Sections*. 
This will bring you back to the Report Sections page.

Select **Submit** and the following pop-up will appear. Click **Ok**.
CSBG Federal Staff Contacts

- **Program Questions**, contact your CSBG Program Specialist
  - Crystal Crews
    Regions IV(b), V, VII
    Crystal.crews@acf.hhs.gov
  - Isaac Davis
    Regions III, VI, IX
    isaac.davis@acf.hhs.gov
  - Jamia Furbush
    Regions II, VIII, X
    jamia.furbush@acf.hhs.gov
  - Jonna Holden
    Regions I, IV(a)
    jonna.holden@acf.hhs.gov

- **Technical Questions** and OLDC Access Concerns
  - Monique Alcantara
    melania.alcantara@acf.hhs.gov
  - Niki Frazier
    nikita.frazier@acf.hhs.gov

Also copy, **CSBGStates@acf.hhs.gov** to ensure prompt response
Questions?