CSBG State Plan Online Data Application Submission

Office of Community Services (OCS)
Division of Community Assistance (DCA)
Community Services Block Grant (CSBG)
August 15, 2018
Welcome!
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
Overview and Reminders
Today’s Focus

• Online Data Collection (OLDC) system Refresher
• Completing the CSBG State Plan (CSP) – Live Demo
• Submitting the CSP
Reminder...

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

• Received OMB Clearance July 2, 2018
• 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 Submission Groups

**GROUP A**

*The following states are required to submit a one- or two-year plan for FY2019*

<table>
<thead>
<tr>
<th>Alabama</th>
<th>Alaska</th>
<th>Arizona</th>
<th>Connecticut</th>
<th>Delaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>District of Columbia</td>
<td>Florida</td>
<td>Georgia</td>
<td>Kansas</td>
<td>Maryland</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>Michigan</td>
<td>Mississippi</td>
<td>Nebraska</td>
<td>New Hampshire</td>
</tr>
<tr>
<td>New Jersey</td>
<td>Oregon</td>
<td>Puerto Rico</td>
<td>South Carolina</td>
<td>South Dakota</td>
</tr>
<tr>
<td>Utah</td>
<td>Vermont</td>
<td>Virginia</td>
<td>Washington state</td>
<td>Wyoming</td>
</tr>
</tbody>
</table>

**GROUP B**

*The following states are solely required to submit a SF-424M for FY2019, but may submit updates to their accepted plans*

<table>
<thead>
<tr>
<th>Arkansas</th>
<th>California</th>
<th>Colorado</th>
<th>Hawaii</th>
<th>Idaho</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illinois</td>
<td>Indiana</td>
<td>Iowa</td>
<td>Kentucky</td>
<td>Louisiana</td>
</tr>
<tr>
<td>Maine</td>
<td>Minnesota</td>
<td>Missouri</td>
<td>Montana</td>
<td>Nevada</td>
</tr>
<tr>
<td>New Mexico</td>
<td>New York</td>
<td>North Carolina</td>
<td>North Dakota</td>
<td>Ohio</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>Pennsylvania</td>
<td>Rhode Island</td>
<td>Tennessee</td>
<td>Texas</td>
</tr>
<tr>
<td>West Virginia</td>
<td>Wisconsin</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## CSBG State Plan Webinar Series

<table>
<thead>
<tr>
<th>Webinar Title</th>
<th>Description</th>
<th>Date</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changes to CSP</td>
<td>A one-time webinar focused on the revisions made to the CSP</td>
<td>January 9</td>
<td>All states</td>
</tr>
<tr>
<td>State Plan Prep!</td>
<td>An annual webinar focused on refreshers to help you in completing your state plan</td>
<td>March 15</td>
<td>Group A</td>
</tr>
<tr>
<td>Button Down: Designation Letter(s), Authorizing Officials, Certifications</td>
<td>An annual webinar focused on requirements around the designation letter, authorizing officials, and certifications</td>
<td>April 17</td>
<td>Group A</td>
</tr>
<tr>
<td>CSBG Eligible Entity Master List</td>
<td>A one-time webinar on how to complete the new CSBG Eligible Entity Master List</td>
<td>July 30</td>
<td>All States</td>
</tr>
<tr>
<td>Submitting the SF-424M!</td>
<td>An annual webinar focused on refreshers for submitting the SF-424M</td>
<td>August 6</td>
<td>Group B</td>
</tr>
<tr>
<td>Great! We Made It!</td>
<td>A one-time webinar focused on the final changes made to the CSBG State Plan</td>
<td>August 14</td>
<td>All states</td>
</tr>
<tr>
<td>Submitting the Plan!</td>
<td>An annual webinar focused on refreshers for submitting the CSBG State Plan in OLDC</td>
<td>August 15</td>
<td>Group A</td>
</tr>
</tbody>
</table>

All recorded webinars can be found on the NASCSP website.
OLDC Refresher
OLDC Overview

- Allows for forms to be submitted quickly and securely
- OLDC roles are based on Grantee Job Types
  - Data Entry – Create, edit and enter data into forms
  - Authorized Official – Reviews and certifies forms
  - Grant Administrator – Perform all actions of Data Entry and Authorized Official, as well as submitting and unsubmitting forms

If the roles from last year remain the same, there is no need to submit a new form!
Register OLDC Accounts

- Individuals must have their own account
- Each state should have **at least one** user per job type
  - Grant Administrator
  - Authorized Official
  - Data Entry Person (Optional)
- Each person must have CSBG assigned to their account
- Verify that you have an account and the right role
  - Link to OLDC Access Form is available in AT 2018-02
  - Submit completed forms by **August 17, 2018**
  - Niki Frazier, nikita.frazier@acf.hhs.gov
Usernames and Passwords

- **New users** will receive their username and passwords via two emails
  - Received from: **notifications@grantsolutions.gov**
  - Contact support if either email is not received

Phone: 1-866-577-0771
help@grantsolutions.gov
Logging into OLDC

• All users will access the Online Data Collection (OLDC) system via GrantSolutions (https://www.grantsolutions.gov) – Chrome, Firefox or Internet Explorer
Accessing OLDC

- Enter your username and password, then click “Login”

- If you are unable to log into OLDC, contact the GrantSolutions helpdesk at help@grantsolutions.gov
Accessing OLDC continued

- The “GrantSolutions – Portal” screen appears. From the menu bar, select **OLDC**.
OLDC Home Tabs: My Recent Activity

- **My Recent Activity**: Displays all forms recently accessed by the user. Possible *Actions* include:
  - **View**: View a form in read-only mode
  - **Edit**: Access the *Report Sections* screen in edit mode
  - **Report Status**: Navigate to the *Report Form Status* page
OLDC Home Tabs: Activity Report

- **Activity Report**: Search for forms in progress, submitted, or approved over the past two years. To access historical data, use the *Report Form Entry* link from the main menu. Possible *Actions* include:
  - **View**: View a report in read-only mode
  - **Edit**: Access the *Report* screen in edit mode
  - **Report Status**: Navigate to the *Report Form Status* page
OLDC Home Tabs: Report Due

- **Report Due**: Access plans that are currently available for submission. Once a plan is submitted, it is removed from this tab but can still be accessed from *My Recent Activity*, *Activity Report*, and from the *Report Form Entry* menu
  - **View**: View a plan in read-only mode
  - **Create**: Start a new plan by navigating to the *Report* screen in edit mode
  - **Edit**: Access an existing report in edit mode
  - **Report Status**: Navigate to the *Report Form Status* page
Submitting New CSBG State Plans
CSBG Eligible Entity Master List

- First **Submit** CSBG Master List
Step 1: Program Name: Select Community Services Block Grant

Step 2: Grantee Name: Select Your state

Step 3: Report Name: Select State Plan

Step 5: Select Action: Select New / Edit / Revise Report
LIVE DEMO

Accessing Reports

- “Report Sections” contains 16 sections (including the cover page)
- Each section’s data is entered separately and sections may be saved individually
Form Entry: Report Sections

• Report Section actions
  - **Clear Section Data**: To delete all data previously saved for a section, click the drop-down arrow next to a section, select **Clear Section Data**, and click **Go**
  - **Edit Section**: To begin entering data for a section, click the drop-down arrow next to a section, select **Edit Section**, and click **Go**
  - **Print**: To print a section, click the drop-down arrow next to a section, select **Print Section**, and click **Go**

You **must** complete Section 1 prior to completing other sections for validation purposes!

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**Table: Section Actions**

<table>
<thead>
<tr>
<th>Section Name</th>
<th>Perform Action</th>
<th>Section Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSBG Cover page (SF-424M)</td>
<td>Select Action: Go</td>
<td>Initialized</td>
</tr>
<tr>
<td>Section 1: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact, and Official State Designation Letter</td>
<td>Select Action: Go</td>
<td>Initialized</td>
</tr>
<tr>
<td>Section 2: State Legislation and Regulation</td>
<td>Select Action: Go</td>
<td>Initialized</td>
</tr>
<tr>
<td>Section 3: State Plan Development and Statewide Goals</td>
<td>Select Action: Go</td>
<td>Initialized</td>
</tr>
</tbody>
</table>
Cover Page (SF-424m)

- If submitting a one-year plan, select:
  1.a. Type of Submission: Plan
  1.b. Frequency: Annual
  1.d. Version: Initial

- If submitting a two-year plan, select:
  1.a. Type of Submission: Plan
  1.b. Frequency: Other (2 Year)
  1.d. Version: Initial
Form Entry: Enter Data

• Data Entry Types
  – **Text boxes**: Enter free text. The character limitations vary for each text box. Text may be copied and pasted from MS Word.
  – **Radio buttons**: Circular; signifies that you can only select one option.
  – **Checkboxes**: Square; signifies that you can select all that apply.
  – **Add rows and select drop-downs**: Enter data, select items from a pre-populated drop-down list, and add additional rows when necessary.
Form Entry: Action Buttons

- **View/Add Attachments**: Allows you to view attachments from this button
  - **Do not attach files** using this button - all allowable attachments are attached to specific cells within the sections

- **Validate**: Checks the Plan for errors or missing data
  - If there are no issues, the Plan is validated and ready to be certified by the Authorized Official

- **Print Full Report**: Prints all sections as one complete report
Report Entry: Attachments

- **Attachments**: Only attach files at the cell level
  - View all attachments from the “Report Form status” page or using the View/Add Attachments button
- Click the **paper clip icon** within a cell to attach one or more files
- **Naming attachments**:
  - Question Number and Header/Descriptive words (*ex. 1.3. Designation Letter*)
  - No special characters (except for the period)
- Attachments should be PDF format and not password protected

1.3. Designation Letter:
Attach the State’s official [CSBG designation letter]. A new designation letter is required if the chief executive officer of the state and/or the designated agency has changed.
Report Entry: Adding Attachment

• The “Cell Level Attachments” screen pops-up
• Click Browse
• In Windows Explorer window, select the correct file
• Click Open
Report Entry: Adding Attachments – Success!

- The “Cell Level Attachments” will pop-up
- Click Attach File

Success Message pops-up once complete!
Report Entry: Attachments continued

- The “Cell Level Attachments” screen refreshes and the document is attached.
- The Attachments table contains the following columns:
  - **Cell Location**: Cell to which the document was attached
  - **File Name**: Document name link. Click the link to open the attachment
  - **Uploaded Date**: Shows date of upload
  - **Upload Status**: Should show as “Saved”
  - **Uploaded By**: Shows the username of the uploader
  - **Actions**: This allows you to Delete the attachment(s)
- Repeat the previous steps to add additional attachments.
- Click **Close** when finished.
Allowable Attachments

- Attachments minimized
  - Character Limit Updated

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Item Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3.</td>
<td>Designation Letter [Required]</td>
</tr>
<tr>
<td>2.3.</td>
<td>Legislation/Regulation</td>
</tr>
<tr>
<td>4.4.</td>
<td>Public Hearing Documentation [Required]</td>
</tr>
<tr>
<td>6.1b.</td>
<td>Alternative Organizational Standards [Required, as applicable]</td>
</tr>
<tr>
<td>10.2.</td>
<td>Monitoring Policies</td>
</tr>
<tr>
<td>15.1.</td>
<td>Lobby Certification</td>
</tr>
<tr>
<td>15.2.</td>
<td>Drug-free Workplace Certification</td>
</tr>
<tr>
<td>15.3.</td>
<td>Debarment Certification</td>
</tr>
<tr>
<td>15.4.</td>
<td>Environmental Tobacco Smoke</td>
</tr>
</tbody>
</table>
Report Entry: Skip Logic

• Hides questions that are dependent on the response to a previous question
  – Hidden questions do not change the number order

**EXAMPLE**

Item 3.3a. requests narratives if you select “Other”

If you choose either of the “Other” options a narrative field will appear
Section 1 – 1.1 and 1.1a.

- CSBG Administrative Information
- 1.1 and 1.1a. Length of Plan and Time Period

<table>
<thead>
<tr>
<th>1.1 Identify whether this is One-Year or a Two-Year Plan</th>
<th>One-Year ☐ Two-Year ☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1a Provide the Federal Fiscal Years this plan covers:</td>
<td>Year One 2019 ☑ Year Two 2020 ☑</td>
</tr>
</tbody>
</table>

Your response will impact the following questions:

<table>
<thead>
<tr>
<th>3.5.</th>
<th>6.5.</th>
<th>7.2.</th>
<th>7.6.</th>
<th>7.7.</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.8.</td>
<td>7.9.</td>
<td>8.1.</td>
<td>8.1a.</td>
<td>10.1.</td>
</tr>
</tbody>
</table>
# Section 1 – 1.2 - 1.5

## Pre-populations, Updates and Pre-populations

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2. and 1.4.</td>
<td>Pre-populates</td>
</tr>
<tr>
<td></td>
<td>- Identify if there are any changes</td>
</tr>
<tr>
<td></td>
<td>- Update those specific items</td>
</tr>
<tr>
<td>1.2b, 1.2d., &amp; 1.4b.</td>
<td>Require new responses</td>
</tr>
<tr>
<td>1.5.</td>
<td>New Question</td>
</tr>
</tbody>
</table>

### 1.2. Lead Agency
Update the following information in relation to the lead agency designated to administer CSBG in the state, as required by Section 676(a) of the CSBG Act.

Information should reflect the responses provided in the Application for Federal Assistance, SF-424M.

Has information in regards to the state lead agency has changed since the last submission of the state plan?  ○ Yes ☐ No

### 1.3. Designation Letter:
Attach the State’s official [CSBG designation letter](#). If either the governor or designated agency has changed, update the letter accordingly. ☐

Instructional Note: The letter should be from the chief executive officer of the state and include, at minimum, the designated state CSBG lead agency and title of the authorized official of the lead agency who is to administer the CSBG grant award.

### 1.4. CSBG Point of Contact:
Provide the following information in relation to the designated State CSBG point of contact. The State CSBG point of contact should be the person that will be the main point of contact for CSBG within the State.

Has Information in regards to the state point of contact has changed since the last submission of the state plan?  ○ Yes ☐ No

### 1.5. State Community Action Association
Provide the following information in relation to the State Community Action Association. There is currently a state Community Action Association within the state.  ○ Yes ☐ No

Information in regards to the state Community Action Association has changed since the last submission of the state plan.  ○ Yes ☐ No
Section 5 – 5.1. – 5.2.

5.1. CSBG Eligible Entities:
In the table below, list each eligible entity in the State, and indicate public or private, the type(s) of entity, and the geographical area served by the entity.

Note: Table 5.1 pre-populates the Annual Report, Module 1, Table C.1.

Types of Entities include Community Action Agency, Limited Purpose Agency, Local Government Agency, Migrant or Seasonal Farmworker Organization, Tribe or Tribal Organization, and Other

<table>
<thead>
<tr>
<th>#</th>
<th>CSBG Eligible Entity</th>
<th>Geographical Area Served by county</th>
<th>Public or Nonprofit</th>
<th>Type of Entity [choose all that apply]</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test Eligible Entity 1</td>
<td>Montgomery County</td>
<td></td>
<td>Community Action Agency</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Test Eligible Entity 2</td>
<td>Prince Georges County, Allegany County</td>
<td></td>
<td>Community Action Agency</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Test Eligible Entity 3</td>
<td>Arlington</td>
<td></td>
<td>Community Action Agency</td>
<td>Limited Purpose Agency</td>
</tr>
</tbody>
</table>

- Pre-populates from Eligible Entity Master List
- Read-only
- 5.2. auto-calculates based on number of entities
### Section 5 – 5.3.

**5.3 Changes to Eligible Entities List:**
Within the tables below, describe any changes that have occurred to the Eligible Entities within the state since the last federal fiscal Year (FFY), as applicable.

One or more of the following changes were made to the eligible entity list: [Check all that apply].

- [ ] Designation and/or Re-Designation
- [ ] De-designations and/or Voluntary Relinquishments
- [ ] Mergers
- [✓] No Changes to Eligible Entities List

If there are no changes from your previous submission

Select *No Changes to Eligible Entities List*
Section 5 – 5.3a. – 5.3c.

5.3a Designation and Re-Designation: Identify any new entities that have been designated as eligible entities, as defined under Section 676A of the Act, since the last federal fiscal year. Include any eligible entities designated to serve an area previously not served by CSBG as well as any entities designated to replace another eligible entity that was terminated (de-designated) or that voluntarily relinquished its status as a CSBG eligible entity.

<table>
<thead>
<tr>
<th>CSBG Eligible Entity</th>
<th>Type</th>
<th>Start Date</th>
<th>Geographical Area Served</th>
<th>Delete</th>
</tr>
</thead>
</table>

Add Section 5 - 5.3a Designation and Re-Designation: 1 ![Add](Add) ![Delete Marked Rows](Delete Marked Rows)

5.3b. Designation and Voluntary Relinquishments: Identify any entities that are no longer receiving CSBG funding. Include any eligible entities that have been terminated (de-designated) as defined under Section 676(c) and Section 676C of the Act, or voluntarily relinquished their CSBG eligible entity status since the last Federal Fiscal Year (FFY). Include any eligible entities designated to serve an area previously not served by CSBG as well as any entities designated to replace another eligible entity that was terminated (de-designated).

<table>
<thead>
<tr>
<th>CSBG Eligible Entity</th>
<th>Reason</th>
<th>Delete</th>
</tr>
</thead>
</table>

Add Section 5 - 5.3b De-Designations and Voluntary Relinquishments: 1 ![Add](Add) ![Delete Marked Rows](Delete Marked Rows)

5.3c. Mergers: In the table below, provide information about any mergers or other combinations of two or more eligible entities that were each listed in the prior year state plan.

<table>
<thead>
<tr>
<th>Original CSBG Eligible Entities</th>
<th>Surviving CSBG Eligible Entity</th>
<th>New Name (as applicable)</th>
<th>DUNS No.</th>
<th>Delete</th>
</tr>
</thead>
</table>

Add Section 5 - 5.3c Mergers: 1 ![Add](Add) ![Delete Marked Rows](Delete Marked Rows)

If there are changes - select the type of change and the correlating table will appear.

**ENTER THE ELIGIBLE ENTITY OFFICIAL NAME AS SHOWN IN THE MASTER LIST**
Section 6 – 6.4a.

Auto-calculates # of exempted eligible entities

The description/justification can be repeated.
Section 7 – 7.2, 7.6. and 7.9.

• How are you planning to allocate the 100% of the CSBG funds that you receiving between:
  – Eligible Entities (7.2.)
  – Administrative Funds (7.6.)
  – Remainder/Discretionary Funds (7.9.)

When combined the percentages provided should equal 100%
### Section 9

9.9 Communication with Eligible Entities and the State Community Action Association:
In the table below, detail how the state intends to communicate with eligible entities, the State Community Action Association, and other partners identified under this State Plan on the topics listed below. For any topic that is not applicable, select "Not Applicable" under Expected Frequency.

<table>
<thead>
<tr>
<th>Subject Matter</th>
<th>Expected Frequency</th>
<th>Format</th>
<th>Brief description of &quot;Other&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upcoming Public and/or Legislative Hearings</td>
<td>Select</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Plan Development</td>
<td>Select</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational Standards Progress</td>
<td>Select</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Accountability Measures Progress</td>
<td>Select</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Select the **Expected Frequency**
  - If you choose **Not Applicable** – Format and Brief Description will remain “read-only”
  - Every Other Option will open **Format** and **Brief Description**
  - Brief Description will only remain open if **Other** is chosen under **Format**
• Option to add additional Subject Matters

• Click “Add” to add additional subject matters

• You are not required to add additional subject matters
10.1. Specify the proposed schedule for planned monitoring visits - including full on-site reviews; on-site reviews of newly designated entities; follow-up reviews - including return visits to entities that failed to meet State goals, standards, and requirements; and other reviews as appropriate.

This is an estimated schedule to assist States in planning. States may indicate “no review” for entities the State does not plan to monitor in the performance period.

*Note: This information is associated with [State Accountability Measure 4Sa(f)](https://example.com); this response pre-populates the Annual Report, Module 1, Table H.1.*

<table>
<thead>
<tr>
<th>CSBG Eligible Entity</th>
<th>Monitoring Type</th>
<th>Review Type</th>
<th>Target Quarter</th>
<th>Start Date of Last Full Onsite Review</th>
<th>End Date of Last Full Onsite Review</th>
<th>Brief Description of &quot;Other&quot;</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Test Eligible Entity 1</td>
<td>Select ✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Test Eligible Entity 2</td>
<td>Select ✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Test Eligible Entity 3</td>
<td>Select ✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Only provide details for the entities that you plan to review in the Federal Fiscal Year
- Monitoring Type
  - Select “No Review” if there are not going to be reviewed
  - Fields will remain “Read-Only”
• Brief Description of “Other”
  – No details required unless "Other" is selected under Monitoring Type
  – If "Other" is selected under Monitoring Type, please provide an explanation here
Section 12 – 12.1

12.1. Required Income Eligibility:
Provide the income eligibility threshold for services in the state.

[Check one item below.]

- 125% of the HHS poverty line
- X% of the HHS poverty line (fill in the threshold)
- Varies by eligible entity

- Previously allowed Select All that Applies (Checkboxes)
- Now only allows Select One (Radio Button)
  - Additional details are required if X%... or Varies by... is selected
CSBG State Plan Submission Process Steps

1. Save
   - Retains information

2. Validate
   - Checks rules and saves data

3. Certify
   - Applies electronic signature

4. Submit
   - Official submission to ACF/CSBG
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?