CSBG Annual Report
Online Submission FY2019

Office of Community Services (OCS)
Division of Community Assistance (DCA)
Community Services Block Grant (CSBG)
February 28, 2019
Welcome!
OCS Guidance

- Action Transmittal (AT) 2019-01: Submission of FY2018 Annual Report – Released December 20, 2018
- Dear Colleague Letter: CSBG Annual Report – Module 3 Stage Implementation – Released April 6, 2018
Today’s Focus

- Online Data Collection (OLDC) system Refresher
- Submitting Module 1
- Submitting Module 2 and 4
- Submitting Module 3
Timeline

• Module 1 available for submission, December 1
• Modules 2 and 3 available for submission, February 19
• Module 4 available for submission, March 11
• CSBG Annual Report due April 30, 2019
Convert Smartform to XML
**XML Export**

Note: The list of errors and warnings will refresh every time the user saves the SmartForm

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Error/Warning Message Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.1 CSBG Eligible Entry Reporting Period</td>
<td>ERROR: Select only one CSBG Eligible Entry Reporting Period</td>
</tr>
<tr>
<td>A.2a. CSBG Expenditures Domains - Employment</td>
<td>WARNING: The value entered for the current year is either more than double or less than half of the value reported last year.</td>
</tr>
<tr>
<td>A.2b. CSBG Expenditures Domains - Education and Cognitive Development</td>
<td>WARNING: The value entered for the current year is either more than double or less than half of the value reported last year.</td>
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<tr>
<td>A.2c. CSBG Expenditures Domains - Income, Infrastructure, and Asset Building</td>
<td>WARNING: The value entered for the current year is either more than double or less than half of the value reported last year.</td>
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<tr>
<td>A.2d. CSBG Expenditures Domains - Housing</td>
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<tr>
<td>A.2h. CSBG Expenditures Domains - Linkages</td>
<td>WARNING: The value entered for the current year is either more than double or less than half of the value reported last year.</td>
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<tr>
<td>B.2a. Hours of Agency Capacity Building - Board Members</td>
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<tr>
<td>B.2b. Hours of Agency Capacity Building - Agency Staff</td>
<td>WARNING: The value entered for the current year is either more than double or less than half of the value reported last year.</td>
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<tr>
<td>B.3a. Volunteer Hours of Agency Capacity Building - Total Hours</td>
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# XML Export

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## Module 2 Errors and Warnings

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**Smart Form Export Created**

The XML Export file was created:
C:\Users\kkujawski\Desktop\Copy of FY18_AR_M2_Central_Arkansas_Development_Council_Inc_07567 3648 (002).xml

[OK]
CSBG OLDC Refresher
OLDC Overview

• Allows quick and secure submission
• Permits different roles for different functions:
  – Job Types
    • Data Entry – Creates, edits, and enters data
    • Grant Administrator – All of the above PLUS submitting and unsubmitting
    • Authorized Official – ONLY reviews and certifies

Annual Reports Do Not Need to be Certified
Register OLDC Accounts

• Mandates each individual have their own account
• Recommends each state have at least one user per job type
  – Grant Administrator
  – Data Entry Person (Optional)
  – Authorized Official (Not Required for the Annual Report)
• Requires CSBG is assigned to each account
• Verify that you have an account and the right role
  – Email Niki Frazier and Monique Alcantara for OLDC form
  – Submit completed forms as soon as possible
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
Accessing OLDC
Logging into OLDC Tips

• Access via GrantSolutions
  – www.grantsolutions.gov

• Accessible through:
  – Chrome (preferred browser)
  – Firefox
  – Internet Explorer

• Save as a Favorite
Collaborating to better serve the grants community

GrantSolutions works with Partners, other government agencies, and private sector collaborators to develop national grant management solutions.

LEARN MORE
Logging into 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

- “GrantSolutions – Portal” screen appears
- Select OLDC from Menu Bar
OLDC Home Tabs:
My Recent Activity and Activity Report

- **My Recent Activity**: Displays all forms recently accessed by the user.
- **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 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: 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

![Image of OLDC Home Tabs: Report Due](image)
Submitting Module 1:
Direct Data Entry
Accessing Module 1

• Select **Report Form Entry** left side of the screen
Form Selection: Steps 1 - 3

- **Program Name**: Select *Community Services Block Grant*
- **Grantee Name**: Select *your state* (Only option)
- **Report Name**: Select *Annual Progress (Module – 1)*
Form Selection: Reporting Period

- **Reporting Period**: Click the + sign of the Federal Reporting Period of 10/01/2017 – 09/30/2018
  - *This will populate data from your FFY2018 CSBG State Plan*
## Report Sections Homepage

- Able to edit all sections from here

### Report Sections

**Program Name:** Community Services Block Grant  
**Grantee Name:** HAWAII - No. 01  
**Report Name:** CSBG Annual Report  
**Report Period:** 10/01/2017 - 09/30/2018

This table displays the sections of the report form and the status of each. Return to this screen to Validate, Certify, or Submit.

Selections in the dropdown lists may include:
- Create Section - Indicated by an asterisk (*), copies that section and creates a new blank section.
- Clear Section Data - Deletes all data saved for that section.
- Delete Section - Permanently deletes that section and data.
- Edit Section - Opens the form section in a data-entry version.
- Print Section - Opens a new browser window with the report in a print-friendly version.

<table>
<thead>
<tr>
<th>Section Name</th>
<th>Perform Action</th>
<th>Section Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section A - Module 1 - State Administration</td>
<td>Select Action:</td>
<td>Initialized</td>
</tr>
<tr>
<td>Section B - Statewide Goals and Accomplishments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section C - CSBG Eligible Entity Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section D - Organizational Standards for Eligible Entities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section E - State Use of Funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section F - State Training and Technical Assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section G - State Linkages and Communication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section H - Monitoring, Corrective Action, and Fiscal Controls</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section I - Results Oriented Management and Accountability (ROMA) System</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Report Sections Homepage

To begin, select the dropdown arrow under Perform Action
Select Edit Section from the dropdown list
Select Go
Response Options

- Auto-populated and New Responses allow for:
  - Narratives (Text Boxes)
  - Radio Buttons (Circular)
  - Checkboxes (Square)
  - Attachments
  - Auto-calculations
  - Skip Logic
Narratives - New Response

• New Response: Characterized by white background

B.3. CSBG Eligibility Entity Feedback and Involvement:
How has the State considered feedback from CSBG Eligible Entities, OGS, public hearings, and other sources, and/or this feedback?

Insert text here.
Narratives – Auto-Populated

• Auto-population means that a response was carried over from your State Plan
• Non-editable: Read-only and characterized by a blue background

- Editable: Editable and characterized by a white background
Radio Buttons

• Circular
• Allows for a singular response
• If State Plan Response is populated, and you need to change it – just select the new radio button

D.1. Assessment of Organizational Standards:
The CSBG State Plan indicated that the State would use the following organizational standards:

- The State will use the CSBG Organizational Standards Center of Excellence (COE) organization
- The State will use an alternative set of organizational standards
Checkboxes

- Square
- Allows for multiple responses
- If State Plan Response is populated, and you need to change it – select and unselect checkboxes as applicable

<table>
<thead>
<tr>
<th>D.1a. How did the State assess CSBG Eligible Entities against organizational standards, as described in IM 138?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Peer to Peer review (with validation by the State or State-authorized third party)</td>
</tr>
<tr>
<td>☑ Self-assessment (with validation by the State or State-authorized third party)</td>
</tr>
<tr>
<td>☐ Self-assessment / Peer review with State risk analysis</td>
</tr>
<tr>
<td>☐ State - authorized third party validation</td>
</tr>
<tr>
<td>☑ Regular, on-site CSBG monitoring</td>
</tr>
<tr>
<td>☐ Other</td>
</tr>
</tbody>
</table>
Skip Logic

- Occurs when selecting one response requires an additional response to another question

B.1. Progress on State Plan Goals:
Describe progress in meeting the State's CSBG-specific goals for State administration of CSBG under this State Plan.

Goals: The State’s CSBG specific goals are as follows: 1. Ensure that the eligible entities meet or maintain compliance with the CSBG Hawaii OCS. 3. Improve State administration of CSBG by implementing CSBG policy and procedures to be developed in conjunction.

- All Goals Accomplished
- Goals Partially Accomplished
- Not Accomplished

Describe Progress

Insert text here.
Attachments

- Attachments do not transfer over
- Attachments allow you to add additional information
- Click the paperclip in order to attach a document
- Filenames should include the question number
Auto-calculations

- Some questions have auto-calculations
- After completing the fields and clicking *Validate*, the responses will calculate

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Entities Assessed</th>
<th>Number that Met all Standards in Category</th>
<th>Actual Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Consumer Input and Involvement</td>
<td>6</td>
<td>6</td>
<td>100.00%</td>
</tr>
<tr>
<td>2. Community Engagement</td>
<td>6</td>
<td>5</td>
<td>83.33%</td>
</tr>
<tr>
<td>3. Community Assessment</td>
<td>6</td>
<td>4</td>
<td>66.67%</td>
</tr>
<tr>
<td>4. Organizational Leadership</td>
<td>6</td>
<td>3</td>
<td>50.00%</td>
</tr>
<tr>
<td>5. Board Governance</td>
<td>6</td>
<td>2</td>
<td>33.33%</td>
</tr>
<tr>
<td>6. Strategic Planning</td>
<td>6</td>
<td>1</td>
<td>16.67%</td>
</tr>
<tr>
<td>7. Human Resource Management</td>
<td>6</td>
<td>4</td>
<td>66.67%</td>
</tr>
<tr>
<td>8. Financial Operations &amp; Oversight</td>
<td>6</td>
<td>3</td>
<td>50.00%</td>
</tr>
<tr>
<td>9. Data &amp; Analysis</td>
<td>6</td>
<td>2</td>
<td>33.33%</td>
</tr>
</tbody>
</table>
Action Buttons

- **Previous Section**: Will take you back to the previous section
- **Save**: Will save any changes that you have made so far
- **View/Add Attachments**: Will open the attachment window
- **Validate**: Will check whether there are any errors throughout the report
- **Next Section**: Will take you forward to the next section
Submitting Modules 2 & 4: Upload SmartForms
Submitting Module 3: Attach SmartForms
Final Tips

• Each Module must be submitted separately
  – Annual Report does not require certifications
• Module 1 is based on the Federal Fiscal Year (October 1, 2017 – September 30, 2018)
  – Data submitted should be based on what was done during FFY2018 with FFY2018 funds
• Modules 2 – 4 is based on the State Reporting Period and the funds spent during that time
CSBG Federal Staff Contacts

- **Program Questions**, contact your 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?