

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

Community Services Block Grant
Action Transmittal
Transmittal No. CSBG-AT-2018-01

U.S. Department of Health and Human Services
Administration for Children and Families
Office of Community Services
330 C Street, S.W., 5th Floor
Washington, DC 20201
<https://www.acf.hhs.gov/programs/ocs/programs/csbg>
Date: July 27, 2018

TO: Community Services Block Grant (CSBG) States and U.S. Territories Grantees

GUIDANCE INTENDED FOR: ☒ STATES
☐ TRIBES/TRIBAL ORGANIZATIONS
☐ TERRITORIES

SUBJECT: Application for Fiscal Year (FY) 2019 Community Services Block Grant (CSBG) Funds Based on the Availability of CSBG Funds

RELATED REFERENCES: Community Services Block Grant Act, Title VI, Subtitle B, of the Omnibus Budget Reconciliation Act of 1981, Public Law 97-35, as amended; Human Services Amendments of 1994, P.L. 103-252; the FY 1996 CSBG Appropriation Legislation, P.L. 104-134; CFR Title 45, Part 96; Coats Human Services Reauthorization Act of 1998, P.L. 105-285; Department of Health and Human Services Block Grant Regulations and Current Poverty Income Guidelines.

PURPOSE: To inform states and U.S. territories of the CSBG application requirements for FY 2019. To qualify for FY 2019 CSBG funding, states must submit their state plan applications to the Office of Community Services (OCS) by September 1, 2018 using the approved online CSBG State Plan format. States shall submit their information electronically through the Administration for Children and Families' (ACF) On-Line Data Collection (OLDC) system.

BACKGROUND: According to Section 676(b) of the Community Services Block Grant (CSBG) Act, states, including territories, must prepare and submit a State Plan for CSBG funding. The Office of Community Services (OCS) provides funds to CSBG grantees based on the determination that their State Plan, which also serves as an application, is complete and in accordance with all requirements of the CSBG Act.

The CSBG State Plan is a critical document for both state and federal oversight of CSBG. The CSBG State Plan – submitted through the Administration for Children and Families (ACF) On-Line Data Collection system (OLDC) – integrates and aligns requirements from the CSBG Act with elements of the overall CSBG Performance Management and Accountability Framework, which includes 1) organizational standards for CSBG eligible entities, 2) accountability measures for states and OCS, and 3) Results Oriented Management and Accountability (ROMA). Ultimately, this

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

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

XML Export

Module2Instructions

Section A. Local CSBG Expen

Section B. Local Agency Capacit

Section C. Local CSBG Resources

Outstanding Errors and Warnings



XML Export

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Smart Form Export Created



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

OK

Module2Instructions

Section A. Local CSBG Expen

Section B. Local Agency Capacit

Section C. Local CSBG Resources

Outstanding Errors

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**



Username 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

GrantSolutions Homepage

www.grantsolutions.gov

Partnering to better serve the grants community.

FAQS CONTACT US Q



ABOUT BENEFITS SERVICES PARTNERS NEWS

LOGIN

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”

THE GRANTS CENTER of EXCELLENCE **GRANTSOLUTIONS.GOV**
Linking Services, Solutions, Communities

Unauthorized Access Warning

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes all devices/storage media attached to this system. This system is provided for Government-authorized use only. Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties. At any time, and for any lawful Government purpose, the government may monitor, record, and audit your system usage and/or intercept, search and seize any communication or data transiting or stored on this system. Therefore, you have no reasonable expectation of privacy. Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

[IMPORTANT BROWSER SECURITY SETTINGS INFORMATION](#)
[GMM PRIORITY KNOWN ISSUES - last updated 07/26/2017](#)
[SYSTEM STATUS - AVAILABLE](#)
[Planned Maintenance Schedule - updated 08/04/2017](#)
[Grants.gov Planned Maintenance Schedule](#)

Login to

Before logging in please read the Warning Notice

Username:

Password:

[LOGIN](#) [HHS PIV](#)

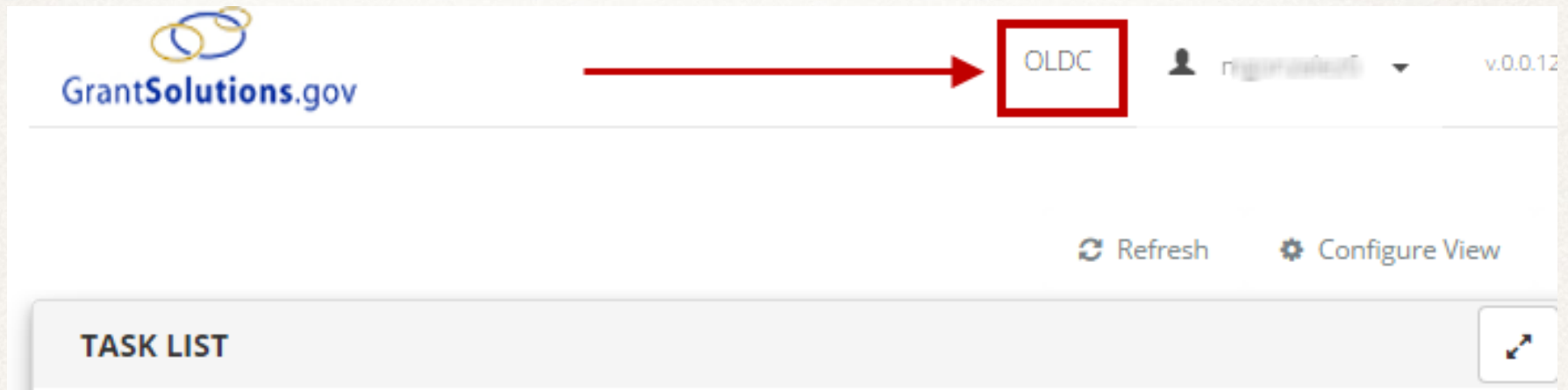
[Having trouble logging in?](#)
[Forgot Password/Unlock Account](#)

[Register New Organization](#)
[Request a User Account](#)

- 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



LIVE DEMO 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 [Switch Home Page \(Regular\)](#)

[Report Form Entry](#)
[Report Data Upload](#)
[User / System Settings](#)
[End OLDC](#)
[Privacy](#)
[Accessibility](#)
[Help / FAQ](#)
[News & Tips](#)

My Recent Activity

Activity Report

Report Due

Project Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
Community Services Block Grant	NM [1 856000570 A5] New Mexico - No. 01(Southeast New Mexico Community Action Corporation)	N/A	Module 2 - CSBG	10/01/2017 - 09/30/2018	02/14/2019 04:02:20 PM	Submitted	Actions
Community Services Block Grant	NM [1 856000570 A5] New Mexico - No. 01(Mid-West New Mexico Community Action Program)	N/A	Module 2 - CSBG	10/01/2017 - 09/30/2018	02/14/2019 04:02:05 PM	Submitted	Actions

Search Box [Export](#) [Print](#) [Page Help](#)



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

OLDC Home

Switch Home Page (Regular)

[Report Form Entry](#)
[Report Data Upload](#)
[User / System Settings](#)
[End OLDC](#)
[Privacy](#)
[Accessibility](#)
[Help / FAQ](#)
[News & Tips](#)

My Recent Activity | Activity Report | **Report Due**

Program :

Community Services Block Grant

Grantee :

KS [1 710950729 A1] Kansas Housing Resources - No. 01

Enter

Search Box

Export

Print

This report was generated on: 02/28/2019 08:55:49

Refresh

Grantee Name	Grant	Report Name	Reporting Period	Due Date	Report Status
KS [1 710950729 A1] Kansas Housing Resources	N/A	Application SF-424M	10/01/2019 - 09/30/2020	09/30/2021 (944 days)	
KS [1 710950729 A1] Kansas Housing Resources	N/A	CSBG Annual Report	10/01/2018 - 09/30/2019	04/06/2020 (402 days)	

Submitting Module 1: Direct Data Entry



Accessing Module 1

- Select **Report Form Entry** left side of the screen

OLDC Home

[Report Form Entry](#)
[Report Data Upload](#)
[User / System Settings](#)
[End OLDC](#)
[Privacy](#)
[Accessibility](#)
[Help / FAQ](#)
[News & Tips](#)

My Recent Activity | **Activity Report** | Report Due

Program Name	Grantee Name	Grant	Report Name
Community Services Block Grant	NM [1 856000570 A5] New Mexico - No. 01(Southeast New Mexico Community Action Corporation)	N/A	Module 2 - CSE
Community Services Block Grant	NM [1 856000570 A5] New Mexico - No. 01(Mid-West New Mexico Community Action Program)	N/A	Module 2 - CSE
Community Services Block Grant	NM [1 856000570 A5] New Mexico - No. 01(Southeast New Mexico Community Action Corporation)	N/A	Module 2 - CSE

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

Program Name:	<input type="text" value="Community Services Block Grant"/>
Grantee Name:	<input type="text" value="HI [1 990266120 B4] (2014-2019) HAWAII - No. 01"/>
Report Name:	<input type="text" value="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*

Form Selection

Program Name:









Grantee Name:

Report Name:

Show entries

Search:

◀ ◀ 1 ▶ ▶

Reporting Period ⚙	Type ⚙	Report Status ⚙	Actions
10/01/2018 - 09/30/2019	Annual		+
10/01/2017 - 09/30/2018	Annual		+
10/01/2016 - 09/30/2017	Annual	Submitted (Revision #1)	   
10/01/2015 - 09/30/2016	Annual	Submitted	   

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.

[View/Add Attachments](#) [Validate](#) [Print Full Report](#)

Show

30

 entries

Search:

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

Report Sections Homepage

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

Show entries

Section Name:	Perform Action:
Section A - Module 1 - State Administration	<div> <div>Select Action: ▼</div> <div>Go</div> </div>
Section B - Statewide Goals and Accomplishments	<div> <div>Select Action:</div> <div>Go</div> </div>
Section C - CSBG Eligible Entity Update	<div> <div>Clear Section Data</div> <div>Go</div> </div>
Section D - Organizational Standards for Eligible Entities	<div> <div>Edit Section</div> <div>Go</div> </div>
Section E - State Use of Funds	<div> <div>Select Action: ▼</div> <div>Go</div> </div>
Section F - State Training and Technical Assistance	<div> <div>Select Action: ▼</div> <div>Go</div> </div>
Section G - State Linkages and Communication	<div> <div>Select Action: ▼</div> <div>Go</div> </div>
Section H - Monitoring, Corrective Action, and Fiscal Controls	<div> <div>Select Action: ▼</div> <div>Go</div> </div>
Section I - Results Oriented Management and Accountability (ROMA) System	<div> <div>Select Action: ▼</div> <div>Go</div> </div>

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, OCS, public hearings, and other sources, and/o 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

B.2. CSBG Eligible Entity Overall Satisfaction Targets:
In the table below, provide the State's most recent target for CSBG Eligible Entity

Prior Year Target
0

- Editable: Editable and characterized by a white background

C.1a. CSBG Eligible Entity	C.1b. Public or Non Profit	C.1c. Type of Entity (Choose all that apply)	C.1d. Geographical Area Served by County (Provide all counties)
Honolulu Community Action Program	Nonprofit	Community Action Agency (CAA) Limited Purpose Agency Local Government Agency Migrant or Seasonal Farmworker Organization	City and County of Honolulu

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) organizational standards
- ☐ 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

D.1a. How did the State assess CSBG Eligible Entities against organizational standards, as described in IM 138?

- ☐ Peer to Peer review (with validation by the State or State-authorized third party)
- ☒ Self-assessment (with validation by the State or State-authorized third party)
- ☐ Self-assessment / Peer review with State risk analysis
- ☐ State - authorized third party validation
- ☒ Regular, on-site CSBG monitoring
- ☐ Other

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 Act and the Hawaii OCS. 3. Improve State administration of CSBG by implementing CSBG policy and procedures to be developed in conjunction with the CSBG Act.

☐ All Goals Accomplished

☐ Goals Partially Accomplished

☐ Not Accomplished

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 Act and the Hawaii OCS. 3. Improve State administration of CSBG by implementing CSBG policy and procedures to be developed in conjunction with the CSBG Act.

☐ All Goals Accomplished

☒ Goals Partially 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

G.1a. Describe the linkages and coordination at the State level that the State created or maintained to ensure increased access to CSBG services by communities and people with low-income people and communities under the CSBG State Plan and avoid duplication of services (as required by the assurance under Section 676(b)(5)) and identified in the CSBG State Plan. Describe or attach additional information as needed and provide a narrative describing activities, including an explanation of any changes from the original CSBG State Plan.

G.1a.
Attachments

G.1a.
Attachments



Auto-calculations

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

Percentage Meeting Organizational Standards by Category			
Category	Number of Entities Assessed	Number that Met all Standards in Category	Actual Percentage
1. Consumer Input and Involvement	6	<input type="text" value="6"/>	100.00%
2. Community Engagement	6	<input type="text" value="5"/>	83.33%
3. Community Assessment	6	<input type="text" value="4"/>	66.67%
4. Organizational Leadership	6	<input type="text" value="3"/>	50.00%
5. Board Governance	6	<input type="text" value="2"/>	33.33%
6. Strategic Planning	6	<input type="text" value="1"/>	16.67%
7. Human Resource Management	6	<input type="text" value="4"/>	66.67%
8. Financial Operations & Oversight	6	<input type="text" value="3"/>	50.00%
9. Data & Analysis	6	<input type="text" value="2"/>	33.33%

Action Buttons

Previous Section

Save

View/Add Attachments

Validate

Next Section

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**
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 - **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?

