Submitting the CSBG Eligible Entity Master List

Introduction
As a reminder, every state must have an up-to-date CSBG Eligible Entity Master List submitted within OLDC. The CSBG Eligible Entity Master List only has be revised when there is an update to the eligible entities within the state. The CSBG Eligible Entity Master List does not require certification by the Authorized Official. Upon completing the CSBG Eligible Entity Master List, be sure to validate, and then click submit. While the Data Entry person is able to do the final validation, only the Grant Administrator is able to submit.

This document primarily focuses on the possible actions for submitting the CSBG Eligible Entity Master List:

- Creating a new CSBG Eligible Entity Master List (not required)
  - Creating a new CSBG Eligible Entity Master List
  - Adding an Eligible Entity
- Revising the CSBG Eligible Entity Master List
  - Un-submitting a previously submitted Master List
  - Revising an Eligible Entity Entry
- Submitting the CSBG Eligible Entity Master List

Please click the links below to jump ahead as necessary.

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Submitting a new CSBG Eligible Entity Master List
All states submitted their original CSBG Eligible Entity Master List in 2018. **No state is required to submit a new form unless their EIN changes, and therefore, they are required to report under a new Grantee Name.**

Creating a New CSBG Eligible Entity Master List

**Step One:** From the OLDC Homepage, select Report Form Entry, and complete the fields as appropriate, selecting CSBG Eligible Entity Master List (CSBG – Master List) for Report Name. Then select Create New Report.

In the example, we used the [state acronym] CSBG ML – ML standing for Master List. However, there is no specific instruction.

**Step Two:** In the Report Description Pop-Up, type in the report description. Then select Create Report.
Adding an Eligible Entity

**Step One:** From the Report Section page, under the Perform Action column, select Edit Section and then Go.

**Step Two:** From the Report Progress, you will have to enter each eligible entity one-by-one. In order to add an eligible entity, select Add Eligible Entity.
**Step Three:** A pop-up warning message will appear, reminding you to save, select ok.

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**Community Services Block Grant (CSBG)**

**Model State Plan**

**Eligible Entities Master List**

The following is a listing of all CSBG Eligible Entities within your state. This should include all eligible entities that receive funding under the "not less than 90% funds" of your CSBG Allocation. This information will be used to complete questions regarding your eligible entities within the State Plan and Annual Report. As well as be used as a tracking tool in the case that the name of an entity changes, there are designations or re-designations, terminations or reductions, or mergers.

Do not include entities that only receive remaining/discretionary funds from the state or tribes/tribal organizations that receive direct funding from OCS under Section 677 of the CSBG Act.

**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 Limited Purpose Agencies, Migrant and Seasonal Farmworker organizations, and Tribes and Tribal Organizations.

<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>
</table>

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**THE PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) Public reporting burden for this collection of information is estimated to average 1.67 hours per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.**

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**U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES**

**ADMINISTRATION FOR CHILDREN AND FAMILIES**

**OMB Clearing No.: 0970-0002**

**Expiration Date: 06/30/2021**
Step Four: Complete the form with the details as they pertain to each eligible entity:

- **DUNS NUMBER** – provide the official Data Universal Numbering System (DUNS) registered to the eligible entity. Note: this number is also used to identify the eligible entity for the CSBG Annual Report Modules 2 – 4.
- **CSBG ELIGIBLE ENTITY OFFICIAL NAME** – provide the official eligible entity name as it is associated with the DUNS number. Do not include any additional information in this text box, including but not limited to acronyms or a more commonly known name.
- **DOING BUSINESS AS NAME (if applicable)** – provide the acronym, doing business as, or more commonly known name. This field is optional.
- **ADDRESS** – provide the official street address, city, state, and zip code as associated with the DUNS number.
- **GEOGRAPHICAL AREA SERVED** – the geographical area(s) served by the eligible entity.
- **PUBLIC OR NON-PROFIT** – identify whether the entity is public or non-profit
- **TYPE OF ENTITY** – identify the type of entity; options include Community Action Agency, Limited Purpose Agency, Migrant or Seasonal Farmworker, Tribe or Tribal Organization.

To select more than one Type of Entity, hold down the CTRL button as you select the multiple options.

Note: If the eligible entity does not fit under one of the types listed, select Community Action Agency. Per the CSBG Act, Section 677, “whether nonprofit or public, entities that receive CSBG funds are generally considered to be CAAs for the purpose of administering CSBG.”

<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>Select</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>Community Action Agency, Limited Purpose Agency, Migrant or Seasonal Farmworker Organization, Tribe or Tribal Organization</td>
</tr>
</tbody>
</table>
**Step Five:** Once you are done completing the fields, click validate at the bottom of the screen. Then click *Go To Main*.

*Note: you must validate each eligible entity form.*

Repeat steps two – five until all eligible entities have been entered. Then proceed to submitting the CSBG Eligible Entity Master List.
Revising the CSBG Eligible Entity Master List

Un-submitting a previously submitted Master List
In order to edit your CSBG Eligible Entity Master List, you must first un-submit the form. **DO NOT CREATE A NEW MASTER LIST IF YOU HAVE PREVIOUSLY SUBMITTED A MASTER LIST.**

Step One: From the OLDC home page, select *Report Form Entry* on the left side of the screen.

Step Two: Complete the form as appropriate, selecting *CSBG Eligible Entity Master List (CSBG – Master List)* as the Report Name. Select the bar graph icon that under *Actions*, which will take you to the Report Status page.

Step Four: You will receive a warning message confirming that you want to un-submit the Master List, click *Ok*. 
**Step Five:** The Report Status will change to *Saved – Validated*. Select *Edit Original* under Report Submissions, which will take you to the *Report Sections page*.

**Revising an Eligible Entity Entry**

**Step One:** From the *Report Section* page, under the *Perform Action* column, select *Edit Section* and then Go.
Step Two: Once you are in the section, you are able to edit or delete an entry using the icons at far right column.

Deleting an Eligible Entity entry
Select the red X in the far right column. You will receive a warning message asking whether you are sure you want to delete. Click okay, and the eligible entity will be deleted.

Note: if you delete an eligible entity this should be reported in 5.3 of the CSBG State Plan.

Editing an Eligible Entity entry
Once you select the edit icon in the far right column, you will be taken to the eligible entity report. Edit the required fields, select validate, and then Go to Main (see steps four and five of Adding an Eligible Entity).
Submitting the CSBG Eligible Entity Master List

**Step One:** Once you are done entering/revising all of the eligible entities within your state, you will have to validate the state-level form.

From the *Report Progress* page, click *Validate*.

**PLEASE NOTE:**

If there are no errors, the *Report Status* and *Section Status* will both show as Saved-Validated.
If there are errors, you will have to clear the errors prior to trying to validate again.

Step Two: Once the state-level form is validated, towards the top of the page, select Report Sections, and then Go to Report Sections.
Step Three: From the Report Sections screen, select Submit

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 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 format.

<table>
<thead>
<tr>
<th>Section Name:</th>
<th>Perform Action:</th>
<th>Section Status:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSBG Model State Plan - Eligible Entities Master List</td>
<td>Select Action:</td>
<td>Saved -- Validated</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries.