Today’s Focus

- Online Data Collection (OLDC) system Refresher
- Completing and submitting the SF-424M – Live Demo
The following states are **required** to submit a SF-424M for FFY2020:

- If you plan to revise/update your accepted plan, please refer to the August 13 webinar.
- If your state is not listed below, you are required to submit a complete CSBG State Plan; please refer to the webinar on August 13.

<table>
<thead>
<tr>
<th>Alabama</th>
<th>Maryland</th>
<th>New Jersey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona</td>
<td>Massachusetts</td>
<td>Oregon</td>
</tr>
<tr>
<td>Connecticut</td>
<td>Michigan</td>
<td>South Dakota</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>Nebraska</td>
<td>Virginia</td>
</tr>
<tr>
<td>Indiana</td>
<td>New Hampshire</td>
<td>Washington</td>
</tr>
</tbody>
</table>
OCS Guidance

- Action Transmittal 2019–05: Application for FFY2020 Funds for States and Territories (based on the availability of CSBG funds)
  - Released July 30, 2019

- Action Transmittal 2019–03: Application for FFY2020 Funds for Tribes and Tribal Organizations (based on the availability of CSBG funds)
  - Released June 13, 2019

- SF-424M due September 1, 2019

- Grant Administrator certifies and submits the SF-424M
FY2019 Annual Report Requirements

- As of this year, submitted separately as the CSBG Annual Report
  - States: Due March 31, 2020
  - Tribes: Due December 30, 2019

- States no longer required to send a submission plan to OCS

- Tribes no longer required to submit on September 1

- Additional information forthcoming
New OGM Requirement

- Office of Grants Management will issue the official Notice of Grant Award via email to the “Authorized Official”

- States are required to verify that the Authorized Official contact information is correct no later than September 1, 2019

- OCS will continue to send a copy of the Notice of Grant Award to the CSBG Program Contact
OLDC Refresher
OLDC Overview and Roles

- Official ACF website to submit forms
- Allows forms to be submitted quickly and securely
- OLDC roles are based on Grantee Job Types
  - Authorized Official (states only) – Reviews and certifies forms
    - Must match the designee within the designation letter
    - OGM will use this information for Award Letters
  - Grant Administrator – Ability to enter data (complete form), submit, and un-submit reports
  - Data Entry (Optional) – Only able to enter data (complete form)
OLDC Accounts

- States should have **at least one** individual per job type:
  - Grant Administrator
  - Authorized Official
  - Data Entry Person (Optional)

- Tribes should have **at least one**:
  - Grant Administrator
  - Authorized Official (Optional)
  - Data Entry Person (Optional)

- Individuals must have their own accounts:
  - Individuals must be from the state lead agency (not state associations, contractors, or eligible entities) or tribe or tribal organization
  - Individuals should not share their passwords
  - Individuals must have CSBG assigned to their account
Usernames and Passwords

- **Current users** should verify that you have an account and the right role

- **New users** must submit an OLDC Access Form
  - Form is available in AT 2018-02 and AT 2019-03 or request via email
  - Submit form no later than August 23, 2019 to Niki

- **New Users** will receive two separate emails with their username and password from notifications@grantsolutions.gov
  - Contact the Monique and Niki if you do not receive the email:
    - melania.alcantara@acf.hhs.gov
    - nikita.frazier@acf.hhs.gov
Live Demo
All users will access the Online Data Collection (OLDC) system via GrantSolutions. (https://home.grantsolutions.gov/home/)

Users are encouraged to use Google Chrome as the web browser.

Grantees with access to OLDC will continue to use their current OLDC login credentials in GrantSolutions.
Log In

- The GrantSolutions homepage displays.
- Click **Login**.
Log In

➢ From the GrantSolutions Login screen, enter your username and password.
➢ Click the Log In button.

Tip: Save the GrantSolutions login screen as a Bookmark or Favorite in your browser.
Accessing OLDC

- The “GrantSolutions – Portal” screen appears.
- From the menu bar, select **OLDC**.
Accessing OLDC

- The “OLDC Home” screen opens in a new window.
Regular Vs Enhanced Version

For most users, this is the first step in the process of locating and working with your specific reports. The following screens present a series of questions to help you select the appropriate report form. This same process is used to check the status of any current or submitted report.

Do you want to keep the enhanced OLDC home page as your default home page?

Yes  No
OLDC Home

OLDC Main Menu

- Report Form Entry
  - Initiate report
  - Enter data
  - Retrieve previous or current reports

- User/System Settings
  - Customize the way OLDC is used

- News & Tips
  - OLDC Documentation
OLDC Home: Tabs

➤ **My Recent Activity**: Displays all reports recently accessed by the user. 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 Image](image-url)
OLDC Home: Tabs

➢ **Activity Report:** Search for reports 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:** Access reports that are currently available for submission. Once a report 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 report in read-only mode
  - **Create:** Start a new report 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
SF-424M
Background: The SF-424M

- On October 1, 2013, ACF directed its program offices, including OCS, to require all mandatory grantees to submit applications electronically. *(See 78 FR 60285-60286, October 1, 2013.)* OCS requires state and tribal grantees to use the OLDC system to submit data on the Application for Federal Assistance SF-424 Mandatory (SF-424M).

- CSBG grantees must submit an electronic application (SF-424M) annually to receive CSBG funds.
Accessing the SF-424M

- From the enhanced Home page, click the **Report Entry Form** tab on the left.
- From the Form Selection screen, complete each field:
  1. Program Name: Community Services Block Grant
  2. Grantee Name: Your Tribe
  3. Report Name: Mandatory Grant Application (SF-424-M)
  4. Click on the + sign (Create) under Actions to the right of the correct Reporting Period: (October 1 – September 30)
Completing the SF-424M Items 1.a.-1.d.

- Complete all sections that have an asterisk “*”
- Since you are submitting for the second year of a two-year plan, select “Plan”, “Other” and “Update”. Enter “Year 2 of 2-year plan” in the text box.
Completing the SF-424M
Items 7-13

- Complete Items 7, 8, 9, and 13.
- You may enter state abbreviation for Item #13 if you do not have a congressional district.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Information</td>
<td>MACHIS LOWER CREEK</td>
</tr>
<tr>
<td>Employer/Taxpayer Identification Number</td>
<td>1630368550A1</td>
</tr>
<tr>
<td>Organizational DUNS</td>
<td>136795639</td>
</tr>
<tr>
<td>Street 1</td>
<td>64 PRIVATE ROAD 1312</td>
</tr>
<tr>
<td>City</td>
<td>ELBA</td>
</tr>
<tr>
<td>State</td>
<td>AL</td>
</tr>
<tr>
<td>Country</td>
<td>Select</td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>Department Name:</td>
</tr>
<tr>
<td>- Department Name</td>
<td></td>
</tr>
<tr>
<td>- Division Name</td>
<td></td>
</tr>
<tr>
<td>Name and contact information</td>
<td></td>
</tr>
<tr>
<td>Prefix</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td></td>
</tr>
<tr>
<td>Fax Number</td>
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<tr>
<td>TYPE OF APPLICANT</td>
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<tr>
<td>Additional Description</td>
<td></td>
</tr>
<tr>
<td>Name of Federal Agency</td>
<td>Administration for Children and Families, Office of Community Services</td>
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<tr>
<td>CFDA Numbers and Titles</td>
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<tr>
<td>Descriptive Title of Applicant’s Project</td>
<td></td>
</tr>
<tr>
<td>Areas Affected by Funding</td>
<td></td>
</tr>
<tr>
<td>CONGRESSIONAL DISTRICTS OF</td>
<td></td>
</tr>
<tr>
<td>- Applicant</td>
<td></td>
</tr>
</tbody>
</table>

Add an additional list of Program/Project Congressional Districts if needed.
Completing the SF-424M Items 14-18

- Item # 16 does not allow a response.
- Select Yes or No under Item #17; if yes, provide an explanation in the text box.
- Click “I agree” under Item #18 (Note: 18a-e fields are auto-filled once the report is certified.)
Report Entry: Attachments

- No attachments are needed for the September 1 submission
- Tribes will be given instructions on how to submit their FY 2019 annual report at a later date.
Reports: Validate

- From the Report Progress screen, click the Validate button.
Reports: Validate

- **Saved -- Validated**: There are no errors and the form is ready to be certified.

- **Validated -- with Warnings**: The report form is saved and validated and there are some errors on the saved form. However, these errors are allowable and the report may still be submitted.

- **Saved with Errors**: An error message appears at the top of the form. Reports with errors cannot be certified and have the status “Saved with Errors”. Errors must be corrected.
Reports with warnings or errors display a message with a short description of the issue just below the Action buttons.

- Click the **Go to Error** link to jump to the field on the screen in question.
- Click the **Long Description** link for more detailed information about the issue.
Reports: Validate

- Resolve the error on the screen and then re-validate the Report Form.
After a report form has been successfully saved and validated, a person with the appropriate role can Certify the report form with a digital signature.

- When clicking the Certify button, the following message appears: “Changes made after saving this form will be lost. You have the ability to sign in the signature area by pressing the Click to Sign button. This will complete your Certify process and officially sign this form.”

- Click OK.
The screen jumps to the Certification section. Click the Click to Sign button.

Attach supporting documents as specified in agency instructions.
When the form is electronically signed, it displays a Certified status.

An **UnCertify** button is available in case there is a need to return to the report for editing.

The report form is now ready to be submitted. Only a person with the role “Submit” has the Submit button. Click **Submit** to officially send the report to ACF.
The "This will officially submit your report to ACF. Do you wish to continue" message displays. Click **OK**.

After submitting a report form, the "Report Form Status" screen appears.

✓ The message "We have received your report. This page shows all reports we have received along with attachments" displays. Click **OK**.
The “Report Form Status” page shows the status of the report:

- **Report Form Status Section**: Contains button to View Original report or any Revisions, the Report Status, Status Date, Report Action, and Print option.
Reports: Status Page

- **Report Status History Section**: History of all the actions taken on the report form, including Report Action, Date and Time, User Name, and Change.

<table>
<thead>
<tr>
<th>Report Submissions</th>
<th>Report Action</th>
<th>Date/Time</th>
<th>User Name</th>
<th>Change (if known)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original</td>
<td>Submitted</td>
<td>05/31/2013 04:23:38 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>Certified</td>
<td>05/31/2013 04:17:51 PM</td>
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<tr>
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<td>Saved -- Validated</td>
<td>05/31/2013 04:15:01 PM</td>
<td>Oldc Test5</td>
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</tr>
<tr>
<td>Original</td>
<td>Saved -- with Errors</td>
<td>05/31/2013 04:11:18 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>Saved</td>
<td>05/31/2013 04:09:30 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>Saved -- with Errors</td>
<td>05/31/2013 04:09:28 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>Saved</td>
<td>05/31/2013 04:09:18 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
<tr>
<td>Original</td>
<td>Saved -- Validated</td>
<td>05/31/2013 04:09:15 PM</td>
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<tr>
<td>Original</td>
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</tr>
<tr>
<td>Original</td>
<td>Saved -- Validated</td>
<td>05/31/2013 04:02:54 PM</td>
<td>Oldc Test5</td>
<td></td>
</tr>
</tbody>
</table>
Reports: Submitting

Submit -- official submission to ACF

Certify -- applies electronic signature

Validate - mathematical and rules checks; saves data

Save - retains information

To edit a form, it must be Unsubmitted and Uncertified
It is important to save often. After 30 minutes of inactivity from your computer to the OLDC server, a warning message appears stating that you will be logged out in 20 minutes.

- Click **OK** to continue working, otherwise any information not saved is lost.
- Activity includes **Saving, Printing, Validating, Certifying, Submitting**, etc.
Reports: End OLDC

- After each use, **End OLDC**.
  - A report form is locked or unavailable for 30 minutes when someone working on a form exits OLDC without clicking End OLDC.
  - When the person who locked the form logs back into OLDC and re-opens the form, it is then unlocked.
Questions