



# FY 2021 CSBG Annual Reporting Webinar Series

## OLDC Refresher

Office of Community Services (OCS)

Division of Community Assistance (DCA)

February 17, 2022

# OLDC - Agenda

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- Reporting Requirements
- OLDC Accounts
- Accessing OLDC
- Submitting Module 1
- Submitting Module 3
- Submitting Modules 2 and 4
- Contacts
- Resources
- Q&A

# REPORTING REQUIREMENTS

# Fiscal Year (FY) 2021 CSBG Annual Reports

- A **Complete Submission** includes:
  - CSBG Annual Report
  - CSBG CARES Annual Report
  - CSBG Disaster Supplemental Annual Report (as applicable)
- Referred to collectively as the CSBG Annual Reports
- **ALL REPORTS** Due March 31, 2022

***Note: The Reporting Requirements remain the same as last year.***

Reference: [CSBG-Action Transmittal \(AT\)-2022-02, Submission of FY 2021 Annual Reports](#)

# Annual Report Review Timeline

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- **SmartForms Released:** January 21, 2022 – February 22, 2022 (M2 – M4)
- **OLDC Availability for all Modules:** January 31, 2022
- **CSBG Annual Reports due:** March 31, 2022
- **Review Start:** Anticipated April 4, 2022\*
- **Initial Feedback to States:** Anticipated July 3, 2022\*



The Quality Assurance Review for M2 & M4 will start upon OCS receiving at least 25% of **Complete Submissions**.  
Initial Feedback is dependent on the Review Start.

# OLDC Accounts

# OLDC Overview

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- Allows secure submission
- Permits different roles for different functions
- Certification is not required



**Annual Reports Do Not Need to  
be Certified by the Authorized  
Official**

# OLDC Accounts cont.

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- Links to Login.gov account
- Mandates Separate Account for All Individuals
- Add CSBG to each account
- Assign to State Personnel Only
- Recommend each state has at least one user per role
  - Data Entry
  - Grant Administrator
  - Authorized Official



# OLDC Roles – Data Entry

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Initialize New Reports (i.e. Module 1)

- Edit Reports
- Enter and Revise Data
- Review Reports



Certify Reports

- Submit Reports
- Unsubmit Reports

# OLDC Roles – Grant Administrator

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- Initialize New Reports
- Edit Reports
- Enter and Revise Data
- Review Reports
- Certify Reports
- Submit Reports
- Unsubmit Reports



Not Applicable

# OLDC Roles – Authorized Official

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- Review Reports (Read-Only)
- Certify Reports



- Initialize New Reports
- Edit and Revise Data
- Cannot Submit Reports
- Cannot Unsubmit Reports

# Existing Users

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- Link to Login.gov
- Verify your account and access
  - Access to correct all reports
- Contact Niki Frazier and Jacinta Mutonga

# New Users

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- Submit [OLDC Access Form](#) to Niki Frazier and Jacinta Mutonga
- Receive Username and Passwords via two emails from:
  - [notifications@grantsolutions.gov](mailto:notifications@grantsolutions.gov)
- Contact Support If Either Email not Received
  - 1-866-577-0771
  - [help@grantsolutions.gov](mailto:help@grantsolutions.gov)
- Link Account to Login.gov

# Accessing OLDC

# Logging In

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- Access via GrantSolutions: <https://home.grantsolutions.gov/home/>
- Accessible through:
  - Chrome (preferred browser)
  - Firefox
  - Microsoft Edge
  - Internet Explorer
- **Save as Favorite**

# GrantSolutions Homepage

<https://home.grantsolutions.gov/home/>

Partnering to better serve the grants community

GrantSolutions  
PARTNERS IN INNOVATION

ABOUT BENEFITS SERVICES PARTNERS NEWS **LOGIN** FAQS CONTACT US

## 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**

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# Login Page – Login.gov

- New Feature!
- Link Your Login.gov Account

Login using any of the following services

GrantSolutions Username:

GrantSolutions Password:

[Submit](#)

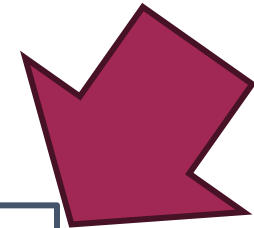
OR

[LOGIN.GOV](#)  
for Recipients & Grantors

[AMS](#) for Grantors

[Forgot username or password?](#)

[Dont have a GrantSolutions account? Request new user account.](#)



# Login Issues

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Contact Niki Frazier and Jacinta Mutonga

Please copy  
[CSBGStates@acf.hhs.gov](mailto:CSBGStates@acf.hhs.gov)  
on all emails



# Access OLDC

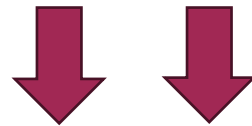
- Next Window: GrantSolutions Portal
- Select OLDC from Menu Bar



The screenshot shows the GrantSolutions Portal interface. The top navigation bar includes the GrantSolutions logo, the text "PARTNERS IN INNOVATION", and a menu bar with "OLDC" highlighted, "INSIGHT", "csbgmsp3", and "v2.2.8 (2/20/2021)". Below the menu bar are links for "Configure View" and "Add Widget". The main content area is titled "TASK LIST" and contains a table with the following columns: Task Description, Sub Tasks, Reassigned By, Task Status, Module, Grant Number, Application #, Budget Period, and Reporting Period. The table is currently empty. At the bottom left, a message states "You currently do not have any tasks assigned." with a green status indicator.

# OLDC Home Tabs

- My Recent Activity: Displays all forms recently accessed by user.
- Activity Report: Search for Initialized, Submitted, and Approved forms
- 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  
Privacy  
Accessibility  
Help / FAQ  
News & Tips  
End OLDC

Activity Report | Report Due | My Recent Activity

Program Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
Community Services Block Grant	VA [1 540959533 A2 ] Virginia - No. 01(Capital Area Partnership Uplifting People)	N/A	Module 4 - CSBG(196)	10/01/2018 - 09/30/2019	05/14/2020 02:05:31 PM	Submitted (Revision #3)	Actions
Community Services Block Grant	MO [1 480898636 A2 ] Missouri - No. 01(North East Community Action Corporation (NECAC))	N/A	Module 4 - CSBG(196)	10/01/2018 - 09/30/2019	05/14/2020 02:05:10 PM	Submitted (Revision #2)	Actions
Community Services Block Grant	MO [1 480898636 A2 ] Missouri - No. 01	N/A	Module 4 - CSBG(196)	10/01/2018 - 09/30/2019	05/14/2020 02:05:11 PM	Saved	Actions

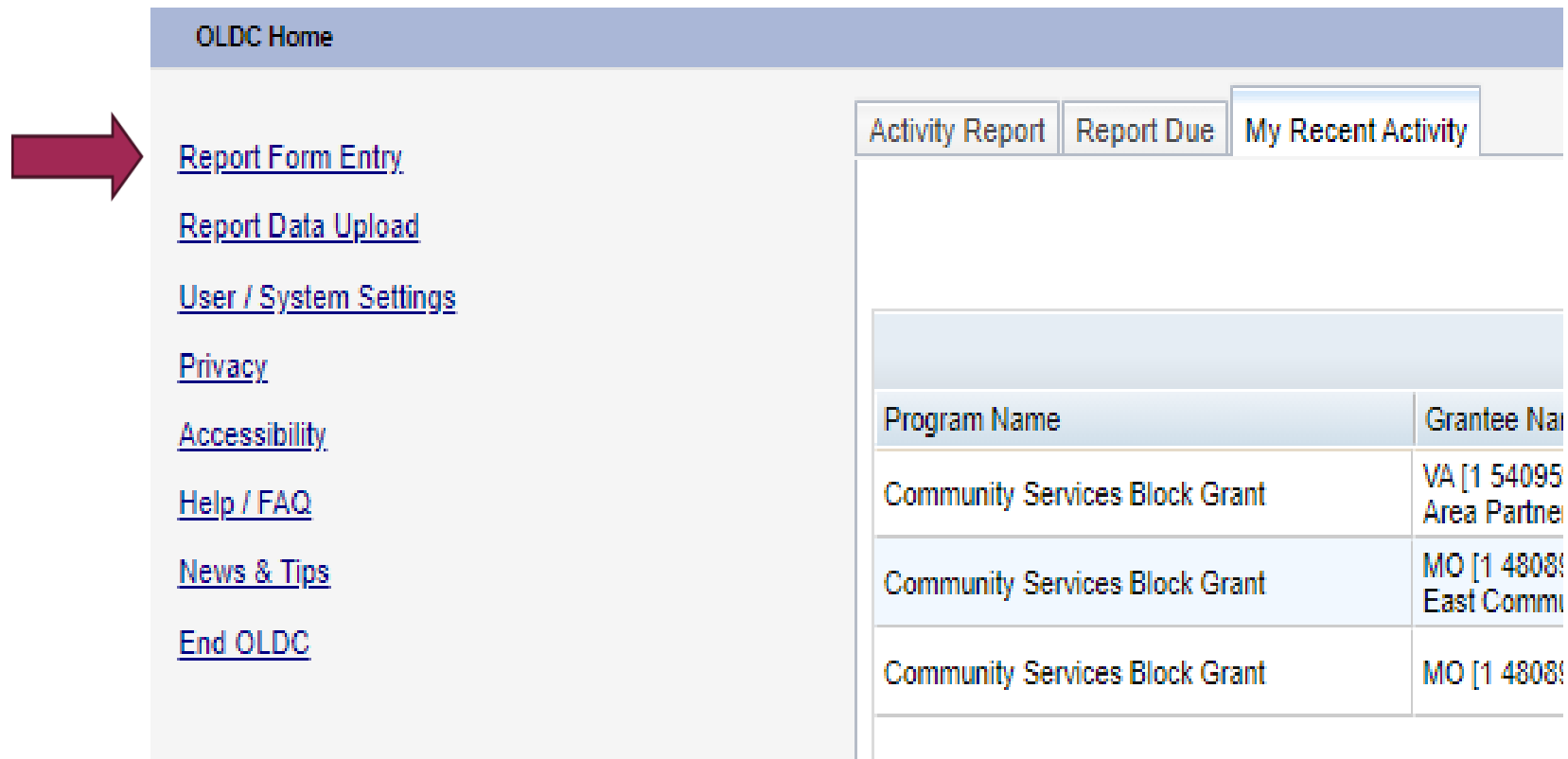
Search Box [X] Export Print

Page Help

# Accessing Modules

# Accessing Modules cont.

- Select Report Form Entry [left side of OLDC homepage]



The screenshot displays the OLDC Home interface. On the left, a vertical menu contains several links: [Report Form Entry](#), [Report Data Upload](#), [User / System Settings](#), [Privacy](#), [Accessibility](#), [Help / FAQ](#), [News & Tips](#), and [End OLDC](#). A red arrow points to the 'Report Form Entry' link. On the right, there are three tabs: 'Activity Report', 'Report Due', and 'My Recent Activity'. Below the tabs is a table with two columns: 'Program Name' and 'Grantee Name'. The table contains three rows of data.

Program Name	Grantee Name
Community Services Block Grant	VA [1 54095 Area Partne
Community Services Block Grant	MO [1 4808 East Commu
Community Services Block Grant	MO [1 4808

# Form Selection

- **Program Name:** Select Applicable Program Name
  - Community Services Block Grant
  - Community Services Block Grant CARES Act
  - Community Services Block Grant Disaster Supplemental
- **Grantee Name:** Select your state (Only option)
- **Report Name:** Select Applicable Report
  - Annual Progress (Module – 1)
  - Module 2 (CSBG Module 2)
  - Module 3 (CSBG Module 3)
  - Module 4 (CSBG Module 4)

Form Selection	
Program Name:	Community Services Block Grant
Grantee Name:	AK [1 936001185 A1] (2002-2022) ALASKA - No. 01
Report Name:	Annual Progress (Module - 1)

# Submitting Module 1



# Module 1 Key Functions

- Initialize
- Edit
  - Direct Data Entry
  - Pre-Populations
  - Auto-Populations
  - Auto-Calculations
  - Cell-Level Attachments
  - Skip Logic
- Clear Errors
- Validate
- Submit

# Initializing Module 1

- Report Period: Click the + sign
- Federal Reporting Period: 10/01/2020 – 09/30/2021

Form Selection

Program Name:

Grantee Name:

Report Name:

Show  entries

Search:

Reporting Period	Report Status	Actions
10/01/2021 - 09/30/2022		<a href="#">+</a>
10/01/2020 - 09/30/2021		<a href="#">+</a>
10/01/2019 - 09/30/2020	Submission Accepted by CO	<a href="#">📄</a> <a href="#">📊</a> <a href="#">📄</a> <a href="#">👁</a>
10/01/2018 - 09/30/2019	Submission Accepted by CO	<a href="#">📄</a> <a href="#">📊</a> <a href="#">📄</a> <a href="#">👁</a>
10/01/2017 - 09/30/2018	Submission Accepted by CO (Revision #1)	<a href="#">📄</a> <a href="#">📊</a> <a href="#">📄</a> <a href="#">👁</a>

**Pre-populates with  
FY2021 data:**

- ✓ Year 2 of your  
FFY2020 CSBG State  
Plan
- ✓ Year 1 of your  
FFY2021 CSBG State  
Plan

# Report Sections Homepage

- Edit Sections
  - Clear Section Data - Deletes all data saved for that section.
  - 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.
- ✓ Able to print sections individually or entire module

Report Sections

[Program Name:](#) Community Services Block Grant  
[Grantee Name:](#) ALASKA - No. 01  
[Report Name:](#) CSBG Annual Report  
[Report Period:](#) 10/01/2018 - 09/30/2019

Return to this screen to Validate, Certify, or Submit.

and creates a new blank section.

print-friendly version.

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

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

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

# Begin Editing

- Select dropdown arrow under Perform Action
- Select Edit Section
- Select Go

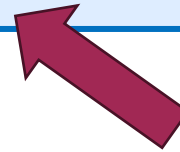
<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Section A - Module 1 - State Administration	Select Action: ▼ <b>Go</b>	Initialized
Section B - Statewide Goals and Accomplishments	Select Action: Clear Section Data <b>Go</b>	Initialized
Section C - CSBG Eligible Entity Update	Edit Section <b>Go</b>	Initialized

# Direct Data Entry - Narratives

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- Editable Narratives: White Text Field

**A1d. Authorized official of the lead agency :**  
**Instructional note: The authorized official could be the director, secretary, commissioner etc. as assigned in the designation letter (attached under item 1.3). The authorized official is the person indicated as authorized representative on the SF-424M.**



# Direct Data Entry – Radio Buttons

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- Radio Button: Circular
  - Allows for a singular response
  - To change response, select a new radio button

A1.b. Cabinet or administrative department of this lead agency
<input type="radio"/> Community Services Department
<input type="radio"/> Human Services Department
<input type="radio"/> Social Services Department
<input type="radio"/> Governors Office
<input type="radio"/> Community Affairs Department
<input type="radio"/> Other, describe



# Direct Data Entry – Checkboxes

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- Checkboxes: Square
  - Allows for multiple responses
  - Able to select and unselect as needed

<b>A.2. Please check additional programs administered by the State CSBG Lead Agency during the reporting year (FFY)</b>
<input type="checkbox"/> Weatherization Assistance Program (WAP)
<input type="checkbox"/> Low Income Home Energy Assistance Program (LIHEAP)
<input type="checkbox"/> U.S. Department of Agriculture Programs
<input type="checkbox"/> U.S. Department of Housing and Urban Development (HUD) Programs
<input type="checkbox"/> Other, Describe

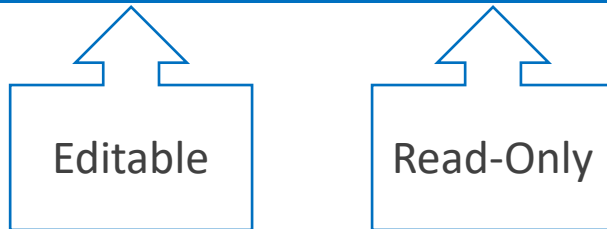


# Pre-Populations

- Pre-Populations: Data populated from FFY2020 CSBG State Plan
  - Read-Only (Blue background) – not able to edit
  - Editable (White background) – editable
- Applicable to All Direct Data Entry Options

period (FFY). The target set in the CSBG State Plan is provided in the left-hand column. For more information on the CSBG Organizational Standards, see [CSBG Information Memorandum # 138](#).

Target vs. Actual Performance on the Organizational Standards					
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met <u>All</u> (100%) State Standards	Actual Percentage Meeting <u>All</u> (100%) of State Standards	Delete
2019	100			0.00%	<input type="checkbox"/>



**Upon initializing Module 1 first check whether your CSBG eligible entity list (Section C) pre-populated!  
If not, contact Monique and Niki immediately**



# Auto-populations

- Auto-populations: Data populated from current CSBG Annual Report
- All Read-Only (Blue background) – not able to edit
- Must validate to take effect

Target vs. Actual Performance on the Organization			
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number of Entities
2019	100		
Add Section D - D2: 1 <span>Add</span> <span>Delete Main</span>			
Progress Indicators			
<i>Indicate the number of entities that met the following percentages</i>			
Note - While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, <u>and</u> 70% progress indicators.	Number of Entities Assessed		
	Number of Entities Assessed		
Number of Entities Assessed			

Target vs. Actual Performance on the Organization			
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number of Entities
2019	100	10	
Add Section D - D2: 1 <span>Add</span> <span>Delete Main</span>			
Progress Indicators			
<i>Indicate the number of entities that met the following percentages</i>			
Note - While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, <u>and</u> 70% progress indicators.	Number of Entities Assessed		
	10		
	Number of Entities Assessed		
	10		
	Number of Entities Assessed		

Completing above field will auto-populate these fields after **VALIDATE**.

# Auto-Calculations

- Section D and Section E
- Read-only
- Percentages and Totals Calculate Automatically
- Must validate to take effect

## BEFORE

Target vs. Actual Performance on the Organizational Standards					
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met <u>All</u> (100%) State Standards	Actual Percentage Meeting <u>All</u> (100%) of State Standards	Delete
2019	100			0.00%	<input type="checkbox"/>



## AFTER

Target vs. Actual Performance on the Organizational Standards					
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met <u>All</u> (100%) State Standards	Actual Percentage Meeting <u>All</u> (100%) of State Standards	Delete
2019	100	10	9	90.00%	<input type="checkbox"/>

# Cell Level 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



OCS only accepts  
**Cell Level Attachments** for Module 1

# Review Sections for Errors

- From the Report Sections screen verify that there are no sections that are showing as “Saved – with Errors”
- If so, you must edit that Section to clear the errors

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

Show  entries

Search:

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

# Clearing Errors

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- Errors are at the top of each section in **RED**
- Errors mean that you missed a question that requires a response
- The **RED** text shows the question that needs a response
- **Goto Error** takes you to the error if it is a narrative
  - For other questions, it will jump to that part of the Section
- **Long Description** explains what you need to do to clear the error
- Once you provide a response, click validate and the error will clear

**Error #1: [19415] Item B.1. Progress on State Plan Goals - All Goals Accomplished.**  
[\[Goto Error\]](#) [\[Long Description\]](#)

# Review Sections for Warnings

- From the Report Sections screen review whether there are Sections showing as “Validated – with Warnings”
- It is A-OK to submit with Warnings! 

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

Show  entries

Search:

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

# Reviewing Warnings

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- Warnings are at the top of each section and are shown in **ORANGE**
- Warning means that you **MIGHT** have missed a question, but there is no requirement to provide a response
- The **ORANGE** text shows the question that needs a response
- **Goto Error** takes you to the warning if it is a narrative
  - For other questions, it will jump to that part of the Section
- **Long Description** explains what you need to do to clear the error
- Upon review, if there is no response required proceed to submitting

**Warning #1: [22125] Item E.4. State Administrative Funds - Zero Obligation.**  
[\[Goto Error\]](#) [\[Long Description\]](#)

# Validate & Submit

- Once all sections are successfully validated, the Submit option appears.



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

Show  entries Search:

Section Name:	Perform Action:	Section Status:
Section A - Module 1 - State Administration	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section B - Statewide Goals and Accomplishments	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section C - CSBG Eligible Entity Update	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section D - Organizational Standards for Eligible Entities	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section E - State Use of Funds	Select Action: <input type="text"/> <a href="#">Go</a>	Validated - with Warnings
Section F - State Training and Technical Assistance	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section G - State Linkages and Communication	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section H - Monitoring, Corrective Action, and Fiscal Controls	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated
Section I - Results Oriented Management and Accountability (ROMA) System	Select Action: <input type="text"/> <a href="#">Go</a>	Saved -- Validated



# Submitting Module 3



# Module 3 Key Functions

- Initialize
- Form-Level Attachments
- Validate
- Submit

# Initializing Module 3 Report

- **Report Period:** Click the + sign
- **Federal Reporting Period:** 10/01/2020 – 09/30/2021

Form Selection

**Program Name:**

**Grantee Name:**

**Report Name:**

Show  entries

Search:

◀ ◀ 1 ▶ ▶ ▶

Reporting Period ⚡	Type ⚡	Report Status ⚡	Actions ⚡
10/01/2020 - 09/30/2021	Annual		+
10/01/2019 - 09/30/2020	Annual		+
10/01/2018 - 09/30/2019	Annual		+

# Form Level Attachments

- Attachments allow you to add additional information
- Click **View/Add Attachments** to attach a document
- Attach one at a time

OLDC Home Form Selection **Report** Report Form Status

[Program Name:](#) Community Services Block Grant  
[Grantee Name:](#) Alaska - No. 01  
[Report Name:](#) Module 3 - CSBG  
[Report Period:](#) 10/01/2019 - 09/30/2020  
[Report Status:](#) Initialized

Report Progress

Initialized  Edit-Saved  Validated  Submitted

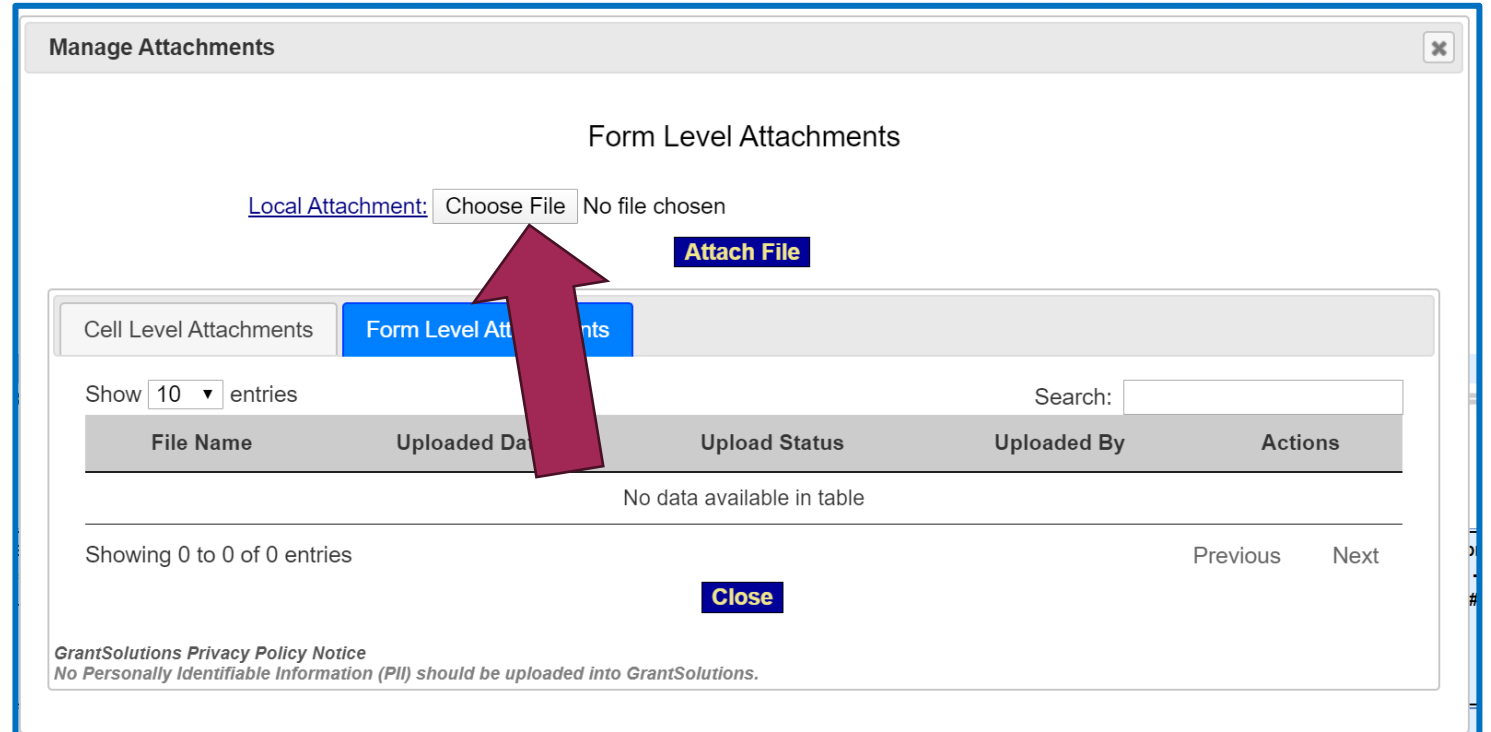
[Save](#) [View/Add Attachments](#) [Validate](#) [Print](#)

OCS only accepts  
**Form Level Attachments**  
for Module 3



# Attaching Module 3 SmartForms

- Form Level Attachments
  - Select Choose File
  - Add files one at a time



The screenshot displays the 'Manage Attachments' window. At the top, it says 'Form Level Attachments'. Below this, there is a 'Local Attachment:' label followed by a 'Choose File' button and the text 'No file chosen'. To the right of this is an 'Attach File' button. Below these elements are two tabs: 'Cell Level Attachments' and 'Form Level Attachments', with the latter being selected. Under the tabs, there is a 'Show 10 entries' dropdown and a 'Search:' input field. Below this is a table with the following columns: 'File Name', 'Uploaded Date', 'Upload Status', 'Uploaded By', and 'Actions'. The table is currently empty, with the text 'No data available in table' centered below it. At the bottom of the table area, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' navigation links. A 'Close' button is located at the bottom center of the window. At the very bottom, there is a 'GrantSolutions Privacy Policy Notice' stating: 'No Personally Identifiable Information (PII) should be uploaded into GrantSolutions.'

# Attaching Module 3 SmartForms (continued)

- Attach File
- File appears under Form Level Attachments
- Repeat until all files attached

Form Level Attachments

[Local Attachment:](#)  No file chosen

Cell Level Attachments

Show  entries Search:

File Name	Uploaded Date	Upload Status	Uploaded By	Actions
FY18_AK_M3_Rural_Alaska_CA P_Inc_02024720_1of10.docx	06/09/2020	Pending	Melania Alcantara1	<input type="button" value="✖"/>

Showing 1 to 1 of 1 entries Previous  Next

**File Appears Here.**

GrantSolutions Privacy Policy Notice  
No Personally Identifiable Information (PII) should be uploaded into GrantSolutions.

# Attachments – M3 Filename

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- Filename:

FY\_STATE ABBREVIATION\_M3\_ELIGIBLE ENTITY NAME\_EE DUNs\_NumberofTotal

- Use abbreviations/acronyms if possible

**Example:**

FY20\_AK\_M3\_Rural\_Alaska\_CAP\_Inc\_02024720\_1of10

# Submitting Module 3 cont.

- Validate – No errors will appear

Report Form Status

Program Name: Community Services Block Grant  
Grantee Name: Alaska - No. 01  
Report Name: Module 3 - CSBG  
Report Period: 10/01/2019 - 09/30/2020  
Report Status: Initialized

Report Progress

Initialized  Edit-Saved  Validated

Save View/Add Attachments Validate Print

A red arrow points to the 'Validate' button in the bottom right corner of the interface.

- Submit

Report Progress

Initialized  Edit-Saved  Validated  Submitted

Save View/Add Attachments Validate Submit Print

A red arrow points to the 'Submit' button in the bottom right corner of the interface.



# Submitting Modules 2 & 4

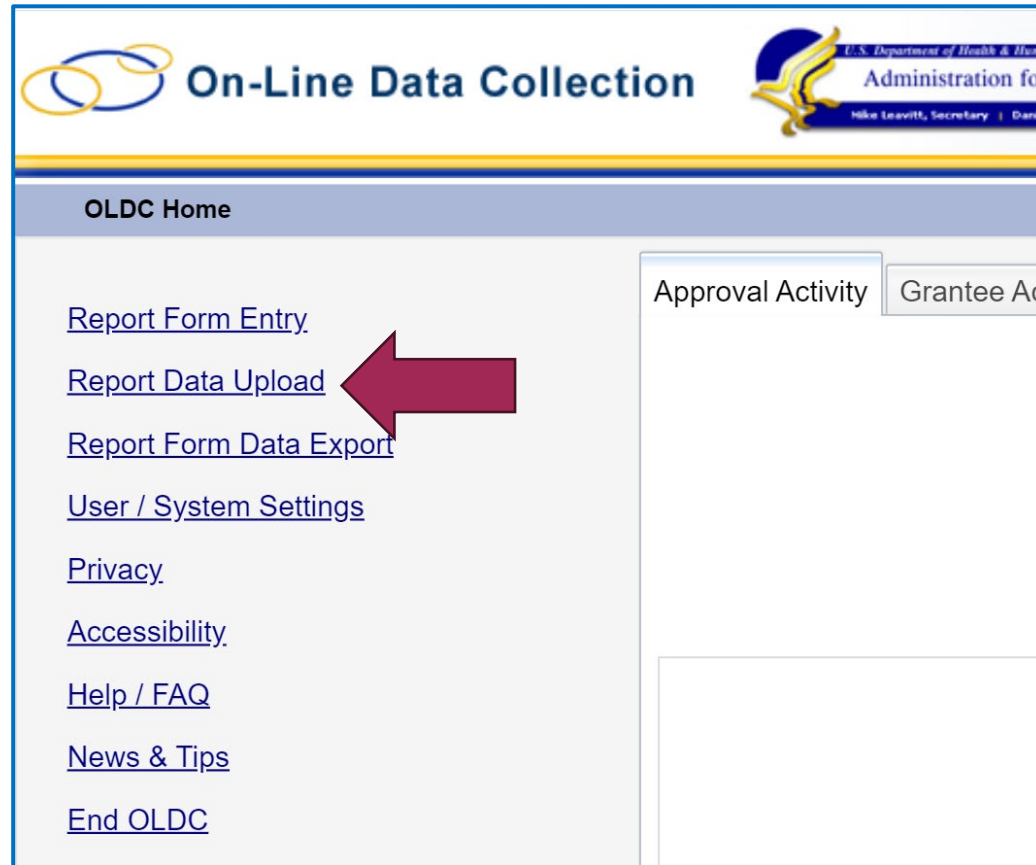


# Module 4 Key Functions

- Export XMLs
- Upload XMLs
- Save XMLs (automated)
- Validate State-Level Form
- Submit State-Level Form

# Report Data Upload

- Select Report Data Upload [left side of OLDC homepage]



The screenshot displays the OLDC (On-Line Data Collection) homepage. At the top, there is a header with the OLDC logo and the text "On-Line Data Collection" on the left, and the U.S. Department of Health & Human Services logo and "Administration for Children & Families" on the right. Below the header is a navigation bar with the text "OLDC Home". The main content area is divided into two columns. The left column contains a list of links: "Report Form Entry", "Report Data Upload", "Report Form Data Export", "User / System Settings", "Privacy", "Accessibility", "Help / FAQ", "News & Tips", and "End OLDC". A large red arrow points to the "Report Data Upload" link. The right column contains two tabs: "Approval Activity" and "Grantee Ac".

# Report Data Upload – Program and Grantee Name

- **Program Name:** Select applicable program
  - Reports must be uploaded separately
- **Grantee Name:** Select your state [Only option]

Report Data Upload

**Program Name:**

**Grantee Name:**

**Report Name:**

---

My Upload Status +

---

Program and Grantee Uploads +

# Report Data Upload – Report Name

- **Report Name:** Select the appropriate Module
  - Modules must be uploaded separately
    - ✓ All SmartForms for the Module can be uploaded at one time

Report Data Upload

**Program Name:**

**Grantee Name:**

**Report Name:**

# Report Data Upload – Report Period

- **Report Period:** Select 10/01/2020 – 09/30/2021
- Option to Add Files Appears


Report Data Upload

**Program Name:**

**Grantee Name:**

**Report Name:**

**Report Period:**

 Drag a file or click [here](#) to upload

Supported Format : .xml

*GrantSolutions Privacy Policy Notice  
No Personally Identifiable Information (PII) should be uploaded into GrantSolutions.*

My Upload Status +

Program and Grantee Uploads +

# File Upload – Drag and Drop

- Open the folder containing the XMLs
- Select the Files
- Drag to the File Upload box

The screenshot shows a web application interface for "Report Data Upload". The interface includes several dropdown menus for selecting data, such as "Community Services Block Grant", "[1 610600439 M1] (1993-2019) Kentucky - No. 01", "Module 2 (CSBG Module 2)", and "01/2017 - 09/30/2018". A central dashed box contains an upload icon and the text "Drag a file or click [here](#) to upload" and "Supported Format : .xml". Below this is a "GrantSolutions Privacy Policy Notice" stating "No Personally Identifiable Information (PII) should be uploaded into GrantSolutions." An overlaid Windows File Explorer window shows a folder named "Test XMLs and SmartForms" containing several XML files, with three files selected: "FY19\_KY\_M2\_Audubon\_Area\_Community\_Services\_Inc\_092567346.xml", "FY19\_KY\_M2\_Bell\_Whitley\_Community\_Action\_Agency\_Inc\_020440632.xml", and "FY19\_KY\_M2\_Big\_Sandy\_Community\_Action\_Program\_Inc\_098956121.xml". Three red arrows point from the selected files in the File Explorer to the upload area in the web application.

# File Upload – Successful Upload

- File Upload box shows as Uploading in Progress
- Confirmation once complete – “Successfully Uploaded [X] files”
- Click Ok

The screenshot displays the Grantsolutions.gov user interface. At the top, a navigation bar includes the U.S. Department of Health & Human Services logo and the Administration for Children & Families logo. The user's name, 'Melania Alcantara', and last login date, '06/10/2020', are visible. A modal dialog box is centered on the screen, displaying the message: 'www.grantsolutions.gov says Successfully uploaded [3] files'. Below the message is an 'OK' button. In the background, the 'Report Data Upload' form is visible, with the following fields: 'Program Name' set to 'Community Services Block Grant', 'Grantee Name' set to 'KY [1 610600439 M1] (1993-2019) Kentucky - No. 01', 'Report Name' set to 'Module 2 (CSBG Module 2)', and 'Report Period' set to '10/01/2018 - 09/30/2019'. At the bottom of the form, there is a dashed box containing a loading icon and the text 'Uploading in progress' with a blue 'Cancel' link and the word 'Upload'.



# File Upload – Upload Complete

- File Upload box shows as Upload Complete


Report Data Upload

**Program Name:**

**Grantee Name:**

**Report Name:**

**Report Period:**



**Upload complete**  
[Upload](#) a new file



This signifies that you uploaded a correct file and that the system accepted it.

# Review Upload Status

- My Upload Status – Select Plus Sign
- Reveals all uploaded XMLs


Report Data Upload

**Program Name:**

**Grantee Name:**


**Report Name:**


**Report Period:**



**Upload complete**  
[Upload a new file](#)

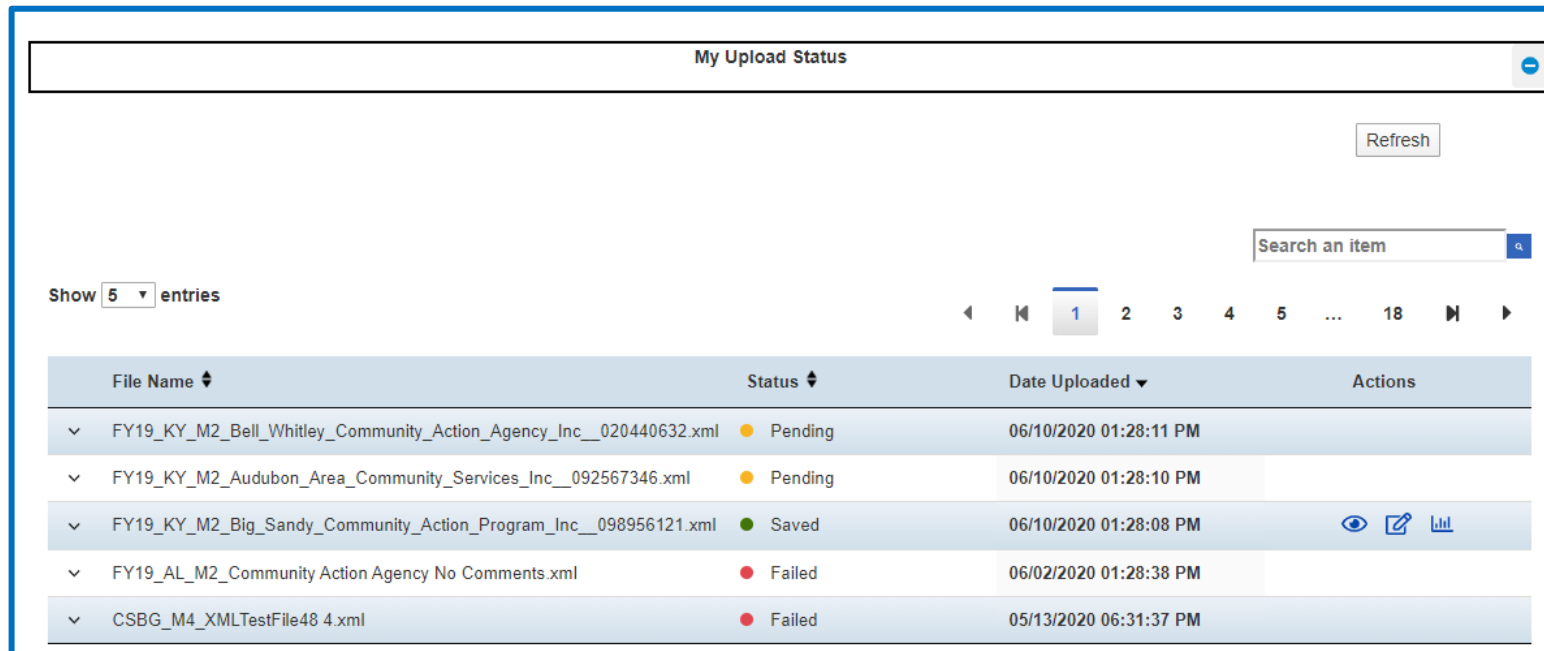
*GrantSolutions Privacy Policy Notice  
No Personally Identifiable Information (PII) should be uploaded into GrantSolutions.*

My Upload Status



# Upload Status

- **File Name:** Name of file
- **Status:** Provides the status of the document: pending, saved, failed
- **Date Uploaded:** Provides the date and time of upload
- **Actions:** Allows you to view the form and the status of that form



The screenshot displays a web interface titled "My Upload Status". At the top right, there is a "Refresh" button and a search bar labeled "Search an item". Below the search bar, it says "Show 5 entries". A pagination control shows page 1 of 18. The main content is a table with the following data:

File Name	Status	Date Uploaded	Actions
FY19_KY_M2_Bell_Whitley_Community_Action_Agency_Inc__020440632.xml	Pending	06/10/2020 01:28:11 PM	
FY19_KY_M2_Audubon_Area_Community_Services_Inc__092567346.xml	Pending	06/10/2020 01:28:10 PM	
FY19_KY_M2_Big_Sandy_Community_Action_Program_Inc__098956121.xml	Saved	06/10/2020 01:28:08 PM	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Download</a>
FY19_AL_M2_Community Action Agency No Comments.xml	Failed	06/02/2020 01:28:38 PM	
CSBG_M4_XMLTestFile48 4.xml	Failed	05/13/2020 06:31:37 PM	

# Upload Status - Statuses

- **Pending:** System is “reading” document to check the correctness of the form and completing a virus scan!
  - This step may take a few minutes
- **Saved:** Confirms that the form is correct and saved
  - After all forms are in **Saved** status for a particular Module, proceed to submitting
- **Failed:** The form failed – contact Monique Alcantara and Joey Lim immediately
















File Name	Status
▼ FY19_KY_M2_Bell_Whitley_Community_Action_Agency_Inc__020440632.xml	● Pending
▼ FY19_KY_M2_Audubon_Area_Community_Services_Inc__092567346.xml	● Pending
▼ FY19_KY_M2_Big_Sandy_Community_Action_Program_Inc__098956121.xml	● Saved
▼ FY19_AL_M2_Community Action Agency No Comments.xml	● Failed

# State-Level and Eligible Entity-Level Forms

- The State-Level form is the first one listed
  - A roll-up of the eligible entities submissions into a State-Level Form
- Eligible Entity forms are the individual forms for each entity

State-level form will initially be in **Saved** status

State-level Form

Grantee Name	Report Status	Revisions	Grantee Type	Actions
Arkansas	Saved	Original	Grantee	   
Mid-Delta Community Services, Inc.	Submitted	Original	SubGrantee	  
Mississippi County, Arkansas Economic Opportunity Commission, Inc.	Submitted	Original	SubGrantee	  
Ozark Opportunities, Inc.	Submitted	Original	SubGrantee	  













Eligible Entity-level Forms

Eligible Entity-level forms should all show as submitted

# Editing the State-Level Form

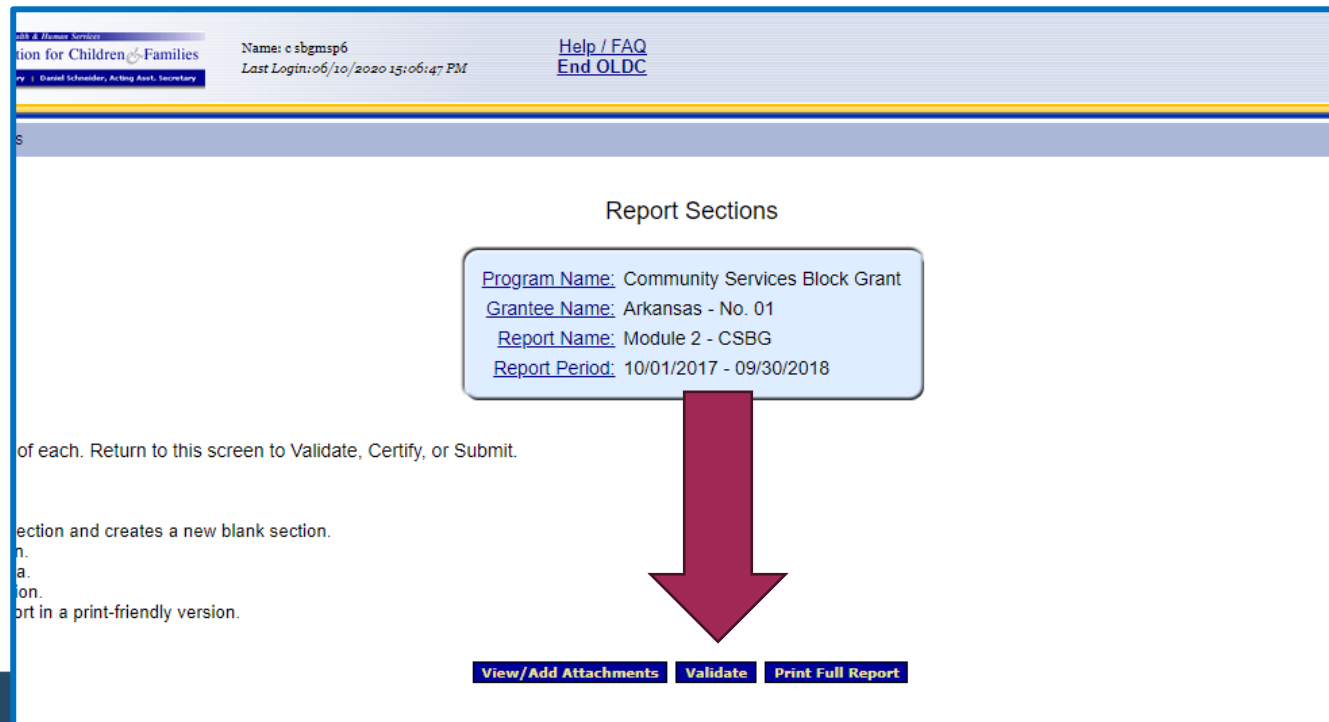
- Select the **Pencil and Paper Icon** to “Edit” state-level form



Grantee Name ▾	Report Status ▾	Revisions ▾	Grantee Type ▾	Actions ▾
Arkansas	Saved	Original ▾	Grantee	   
Mid-Delta Community Services, Inc.	Submitted	Original	SubGrantee	  
Mississippi County, Arkansas Economic Opportunity Commission, Inc.	Submitted	Original	SubGrantee	  
Ozark Opportunities, Inc.	Submitted	Original	SubGrantee	  

# Attachments and Validate

- **View/Add Attachments** to attach state comments (as applicable)
- **Validate**
  - No errors will appear



The screenshot shows a web application interface. At the top, there is a header bar with the following information: "Name: c\_sbgmsp6", "Last Login: 06/10/2020 15:06:47 PM", and links for "Help / FAQ" and "End OLDC". Below the header, the main content area is titled "Report Sections". A central box contains the following details: "Program Name: Community Services Block Grant", "Grantee Name: Arkansas - No. 01", "Report Name: Module 2 - CSBG", and "Report Period: 10/01/2017 - 09/30/2018". A large red arrow points downwards from this box to a row of three buttons: "View/Add Attachments", "Validate", and "Print Full Report".

# Complete Submission

- **Submit** state-level form to complete submission


Report Sections

Program Name: Community Services Block Grant  
Grantee Name: Arkansas - No. 01  
Report Name: Module 2 - CSBG  
Report Period: 10/01/2017 - 09/30/2018

screen to Validate, Certify, or Submit.

blank section.


on.



View/Add Attachments Validate Submit Print Full Report



# Completing Your Modules 2 and 4 Submission

- Upload XMLs for all Reporting Eligible Entities
  - Upload Blank XMLs if:
    - **CSBG:** if de-designated after October 1, 2020 
    - **CARES & Disaster:** if entity did not expend funds or declined funds
- Submit the state-level form for each Module once all XMLs are Uploaded

*If an entity is reported in the State Plan/Application – they must be reflected in the Annual Report*


# How to Report if No CARES and/or Disaster Funds were Expended?

- **States:**
  - **CARES:** Describe the challenges within **Module 1, Section B** under the progress update of your Goals (B.1) and/or under Lessons Learned (B.3)
  - **Disaster Supplemental:** All states should have obligated all Stage 1 and Stage 2 funds by September 30
- **Eligible Entities:**
  - If an eligible entity declined CARES funds and/or returned Disaster funds:
    - Please note this information in **Module 2, A.6** and upload
    - Upload a blank Module 4 XML

*Uploading a Blank XML is the state and eligible entity confirming that they did not expend funds*

# What is a Complete Module 2 & Module 4

- Submission of all XMLs for **all** reporting eligible entities
- Submission of the state-level form within GrantSolutions
- Comments clarifying your data (Optional)




CSBG Eligible Entities  
**Submit Data**  
(and comments)  
to States

- Via state database or **SmartForms**




States  
Review &  
**Export to XMLs**



States  
**Upload XMLs** to the  
On-Line Data  
Collection  
system  
(OLDC)



XMLs Save  
(OLDC auto-  
function)



States  
**Submit State-Level Form**  
(including **attaching**  
comments)  
in OLDC

# Submissions – Reporting Periods

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- Each Module must be submitted separately
  - Annual Report does not require certifications
- Module 1 is based on the Federal Fiscal Year
  - October 1, 2021 – September 30, 2022
  - Submit based on work completed during FFY2021 with FFY2021 funds
- Modules 2 – 4 is based on the State Reporting Period
- Submit based on work and funds spent during that time

# Contacts



*In partnership with the*  
**National Association for State  
Community Services Programs (NASCSPP)**

# OCS Program Specialists Contacts

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**Please send all TA questions to Monique  
and Niki!**

Please copy [CSBGStates@acf.hhs.gov](mailto:CSBGStates@acf.hhs.gov)  
on all emails





# NASCSP Contacts

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**Please send all SmartForms TA questions to Muska and Paige!**

Please copy  
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on all emails



# RESOURCES



# CSBG Grantee Toolkits

U.S. Department of Health & Human Services & Administration for Children & Families Select an ACF Office

**OFFICE OF COMMUNITY SERVICES**  
*An Office of the Administration for Children & Families*

About Get Help Programs Grants Resources

[Home](#) > [Office of Community Services \(OCS\)](#) > [OCS Programs](#) > [Community Services Block Grant \(CSBG\)](#) > CSBG Grantee Toolkits [PRINT](#)

## CSBG Grantee Toolkits

To make resources easier to access on the CSBG website, OCS has created grantee toolkits that include all subject-relevant content for CSBG CARES Act and Disaster Relief Supplemental funds. These toolkits highlight information pertinent to funding, reporting, monitoring, and guidance.

[CARES Act Resources](#)

[CSBG Disaster Supplemental Resources](#)



# OCS Webinars

U.S. Department of Health & Human Services Administration for Children & Families Select an ACF Office

**OFFICE OF COMMUNITY SERVICES**  
*An Office of the Administration for Children & Families*

Search Select Language

About Get Help Programs Grants Resources

Home > Office of Community Services (OCS) > FY 2022 CSBG Webinars

PRINT

## FY 2022 CSBG Webinars

Listen

View FY 2021 CSBG Webinars

### FY2021 CSBG Annual Reporting Kick-Off



January 26, 2022 3:00 — 4:00PM ET

This session is the kick off to the FY2021 CSBG Annual Reporting. OCS will provide general updates and the timeline.

Click [HERE](#) to view the PowerPoint Presentation.

### FY2021 CSBG Annual Report Module 1



February 1, 2022 3:00 — 4:15PM ET

DCA will provide information about submitting Module 1 for CSBG, CARES, and Disaster and answer FAQs.

Click [HERE](#) to view the PowerPoint Presentation.



# QUESTIONS

# Upcoming Webinars

Date	Webinar	Subject
<b>February 23, 3:00p – 4:15pm</b>	FY2020 Annual Report Reading and Responding to the Review	The Office of Community Services (OCS), Division of Community Assistance (DCA) will provide information to states on how to read their review memos and how to respond.
<b>March 8, 3:00pm – 4:00pm</b>	CSBG and Workforce Innovation and Opportunity Act: How to Partner	The Office of Community Services (OCS), Division of Community Assistance (DCA) will provide CSBG State Grant Recipients with information on the Workforce Innovation and Opportunity Act (WIOA) and the WIOA Combined State Plans, to share the process and benefits of including CSBG as a partner program, and to provide the opportunity to ask questions.



# THANK YOU

