FY24 CSBG Annual Report Webinar Series: Accessing the Online Data Collection

Division of Community Assistance (DCA)

Office of Community Services (OCS)

December 9, 2024

WELCOME

ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

CSBG
Community Services Block Grant

Meet the Presenters

Niki Frazier-Curry

Senior Records Specialist

Monique Alcantara

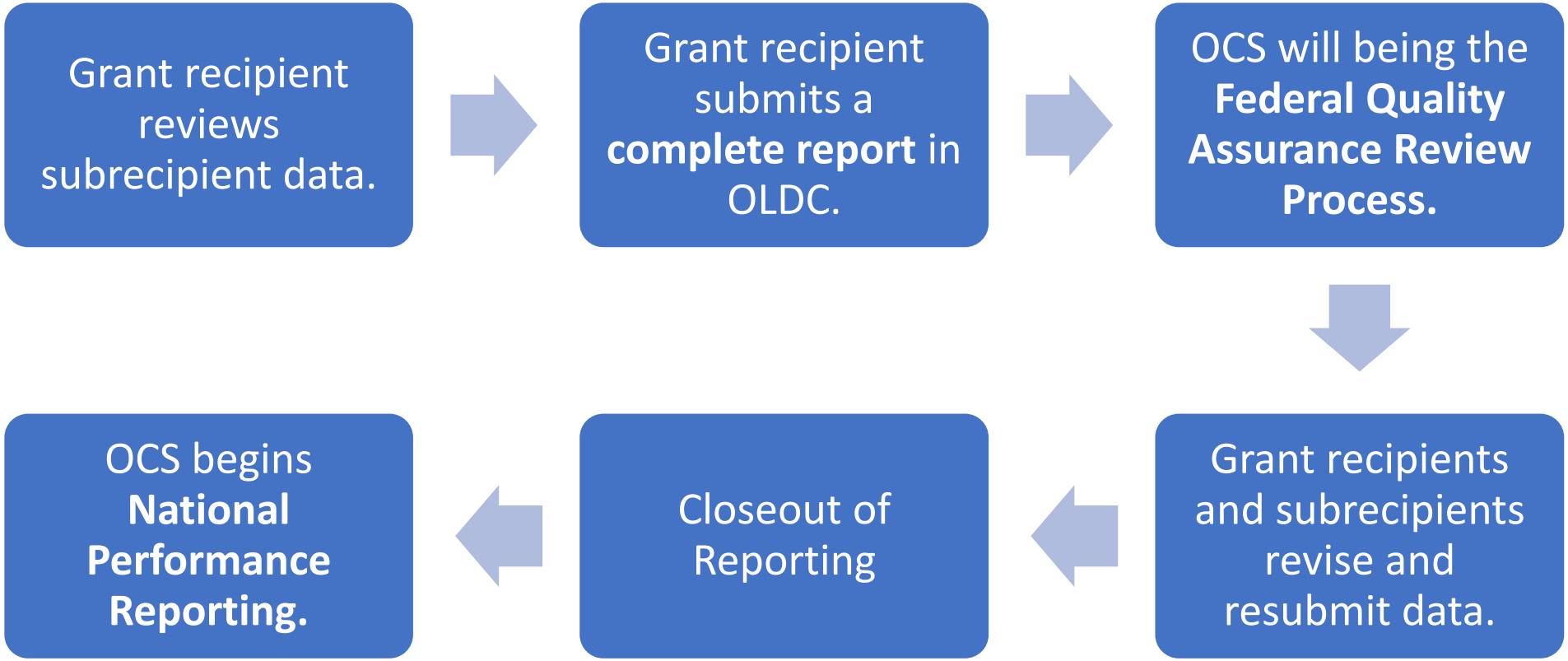
Management Analyst

Webinar Agenda

- Welcome
- Reporting Requirements Review
- OLDC Overview
- Accessing OLDC
- Submitting Annual Report (By Module)
- Resources

Reporting Requirements Review

FY24 CSBG Annual Report Process



ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

CSBG
Community Services Block Grant

Fiscal Year (FY) 2024 CSBG Annual Report

Due Date: March 31, 2025

- The FY24 Annual Report **does not** require reporting for CARES nor Disaster as they are closed.
- The FY24 Annual Report **does not** include the proposed changes of Annual Report 3.0.
- OLDC is available for all 4 Modules.
  - Modules 1, 2, and 4 are required.
  - Module 3 is optional.

ACF-OCS-CSBG-AT-25-01 Annual Report Submission FY24

OLDC is…

On-Line Data Collection Overview

Online Data Collection Key Functions

Online Data Collection (OLDC):

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

OLDC Account Management

Link GrantSolutions to your Login.gov account.

Have separate account for all individuals.

Assign access to state or territory personnel only.

Add CSBG to each account.

Recommend each state has at least one user per role.

- Data Entry Person
- Grant Administrator
- Authorized Official

OLDC Roles and Permissions

Data Entry Person

Initialize New Reports (i.e., Module 1)

Edit Reports

Enter and Revise Data

Review Reports

This role is unable to:

- **Certify Reports**
- **Submit Reports**
- **Un-Submit Reports**

Grant Administrator

Initialize New Reports

Edit Reports

Enter and Revise Data

Review Reports

Certify Reports

Submit

Un-submit Reports

Authorized Official

Review Reports (Read-Only)

Certify Reports

This role is unable to:

- **Initialize New Reports**
- **Edit and Revise Data**
- **Submit Reports**
- **Un-Submit Reports**

Accessing OLDC

Recipient User Account Request Form Part 1

New Users

- Submit Recipient User Account Request Form.
- The new user:
  - Reads Rules of Behavior.
  - Prints full name.
  - Signs and dates.

GrantSolutions
PARTNERS IN INNOVATION

Grant Recipient User Account Request Form: Part 1

Rules of Behavior

As a User granted Grant Recipient access in GrantSolutions, I agree to abide by the following:

- I will not disclose data from the GrantSolutions system to any unauthorized users.
- I will not make any unencrypted electronic copies of data from the GrantSolutions system.
- I will take all reasonable steps to ensure I do not violate the privacy and confidentiality of all data from the GrantSolutions systems as per the Privacy Act of 1974.
- I will ensure the proper disposal of data (in any format) and printed reports.
- I will access the GrantSolutions system only to the extent that my duties require such access.
- I will report inappropriate or malicious use of the GrantSolutions system to the GrantSolutions Help Desk at help@grantsolutions.gov.
- I will immediately notify the GrantSolutions Help Desk of any account changes, including the need to close my account.

User Name (Printed) _____

User Signature _____ Date _____

Recipient User Account Request Form Part 2

New Users

- Select New Account.
- Select Administration for Children and Families.
- Complete text fields.
  - Grant Recipient organization name and address
  - Grant Number(s) and UEI
  - User first and last name
  - Organization work title
  - Phone and email
- Check Assistive Technology box if applicable.

GrantSolutions
PARTNERS IN INNOVATION

Grant Recipient User Account Request Form: Part 2

Request Type: New Account | Account Change | Account Closure

Funding Entity:

Department of Health & Human Services
- Administration for Children and Families
- Administration for Community Living
- Administration for Strategic Preparedness & Response
- Centers for Disease Control and Prevention
- Centers for Medicare & Medicaid Services
- Health Resources & Services Administration
- Indian Health Service
- Office of Head Start
- Office of the Assistant Secretary for Health
- Office of the National Coordinator for Health Information Technology

Department of Homeland Security

Department of Transportation
- Federal Motor Carrier Safety Administration Federal
- Railroad Administration
- Office of the Secretary (AMJP)
- Pipeline and Hazardous Materials Safety Administration
- Federal Highway Administration (FHWA)
- Federal Aviation Administration (FAA)

Department of the Treasury
- Internal Revenue Service
- Office of Grant Community Relations

- Bureau of the Fiscal Service
- Consumer Product Safety Commission Department of Agriculture
- Department of Housing and Urban Development
- Department of the Interior
- Department of Labor
- Electoral Assistance Commission
- Environmental Protection Agency
- Gulf Coast Ecosystem Restoration Council
- Office of National Drug Control Policy (ONDCP)
- Public Health Service
- Small Business Administration
- Social Security Administration
- Treasury – RESTORE Act
- Veterans Affairs
- Other:

Grant Recipient (Organization):
Address 1 (Organization):
Address 2 (Organization):
City: State: ZIP:
Grant Number(s):
UEI:
User First Name: User Last Name:
Title:
Phone:
Email:

Assistive Technology – Assistive Technology, such as JAWS, is used for visual impairment.

I use a Visual Impairment (screen reader/JAWS) Assistive Technology.

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Recipient User Account Request Form Part 2 Cont.

New Users

- Select Role Authority within organization.
- Enter supervisor or Authorized Official's name and title.
- Sign form (new user's supervisor or Authorized Official signs).

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Role Authority:

- Authorizing Official/Authorizing Representative
- Financial Officer
- Financial Officer Support
- Program Director/Principal Investigator
- Support Staff

Supervisor or Authorized Official Name:

Title:

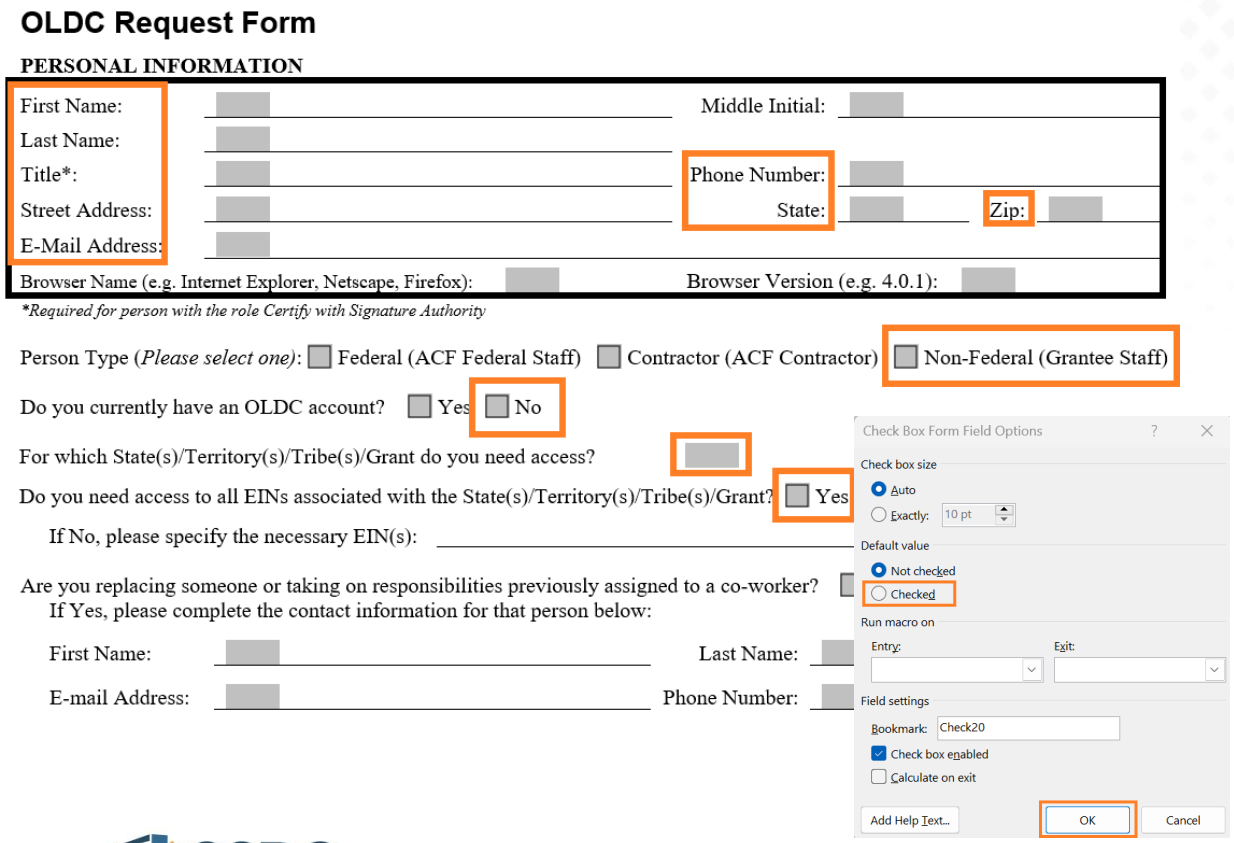
Signature:

Note: The Supervisor or Authorized Official should sign requests.

OLDC Access Form

New Users

- Submit OLDC Access Form.
  - Enter information directly on the form
  - Include the organization's city on the Street Address line.
  - Double-click on the checkbox(es) to select the option to check the box.
  - Do not convert the document to another file type, i.e., PDF.



OLDC Request Form

PERSONAL INFORMATION

First Name: Middle Initial:
Last Name:
Title*: Phone Number:
Street Address: State: Zip:
E-Mail Address:
Browser Name (e.g. Internet Explorer, Netscape, Firefox): Browser Version (e.g. 4.0.1):

**Required for person with the role Certify with Signature Authority*

Person Type (*Please select one*): Federal (ACF Federal Staff) Contractor (ACF Contractor) Non-Federal (Grantee Staff)

Do you currently have an OLDC account? Yes No

For which State(s)/Territory(s)/Tribe(s)/Grant do you need access?

Do you need access to all EINs associated with the State(s)/Territory(s)/Tribe(s)/Grant? Yes

If No, please specify the necessary EIN(s):

Are you replacing someone or taking on responsibilities previously assigned to a co-worker?
If Yes, please complete the contact information for that person below:

First Name: Last Name:

E-mail Address: Phone Number:

Check Box Form Field Options
Check box size
Auto
Exactly: 10 pt
Default value
Not checked
Checked
Run macro on
Entry: Exit:
Field settings
Bookmark: Check20
Check box enabled
Calculate on exit
Add Help Text... OK Cancel

OLDC Access Form Cont.

New Users

- Submit OLDC Access Form.
  - Enter information directly on the form
  - Include the organization's city on the Street Address line.
  - Double-click on the checkbox(es) to select the option to check the box.
  - Do not convert the document to another file type, i.e., PDF.

Programs:	Forms:	Job Type: (One Per Program)	Additional Roles:	Primary * Contact:	E-Mail Notification upon Submit and Unsubmit:
CSBG	☒ All	Grant Administrator		☒ Yes ☐ No	☒ Yes ☐ No
	Specific Forms:				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				
CSBG CARES	☒ All	View Only		☐ Yes ☒ No	☐ Yes ☒ No
	Specific Forms:				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				
CSBG Disaster	☒ All	View Only		☐ Yes ☒ No	☐ Yes ☒ No
	Specific Forms:				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				
	Form Name(s):				

Submitting Access Forms

- Submit Recipient User Account Request Form and OLDC Access Form to the GrantSolutions Support Center:

  help@grantsolutions.gov

- You will receive a ticket number to keep track of your submission.
- If you have any questions after your submission, please contact the GrantSolutions Support Center at help@grantsolutions.gov or toll-free at (866) 577-0771.

Existing OLDC User Checks

Existing Users

- Verify your GrantSolutions email is linked to Login.gov (Required).
- Verify your OLDC account and access.
- For Technical Assistance: Contact your Data and Evaluation Specialist and copy CSBGData@acf.hhs.gov.

Login.gov Help Desk: 844-875-6446

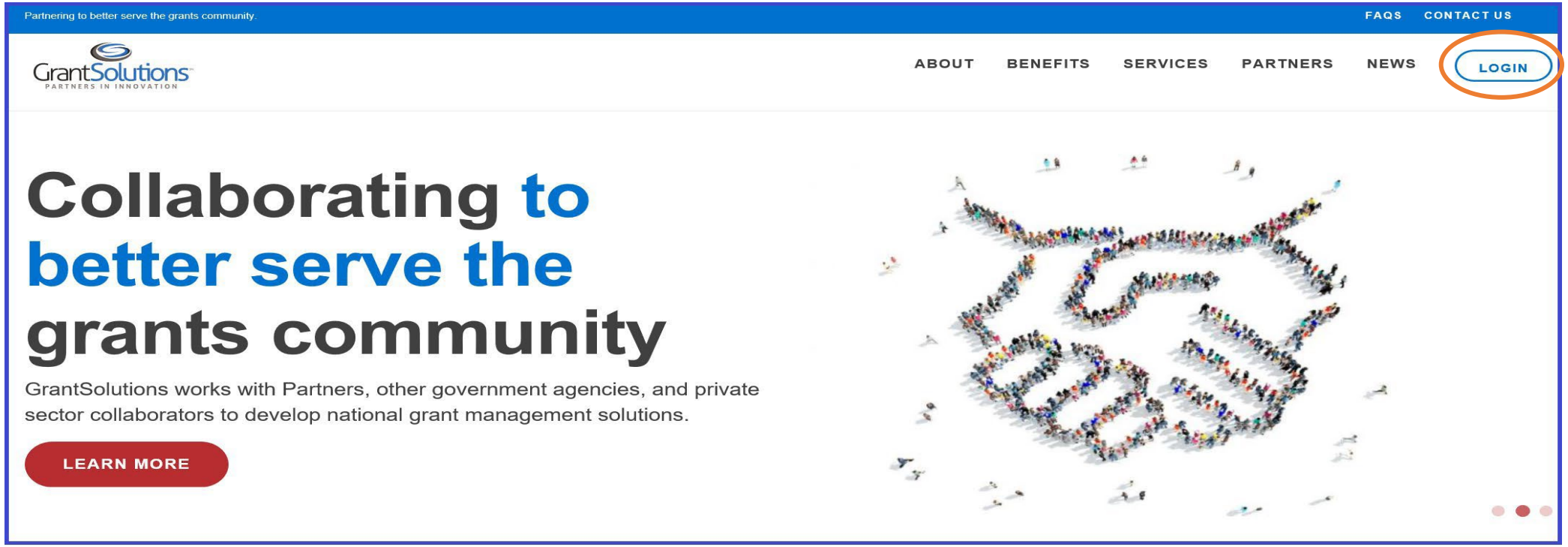
Login.gov Instructions

GrantSolutions offers step-by-step instructions on how to create a Login.gov account or link your GrantSolutions email address to your Login.gov account.

- Creating a Login.gov Account
- Adding a GrantSolutions Email Address to a Login.gov Account

GrantSolutions Homepage

GrantSolutions.gov



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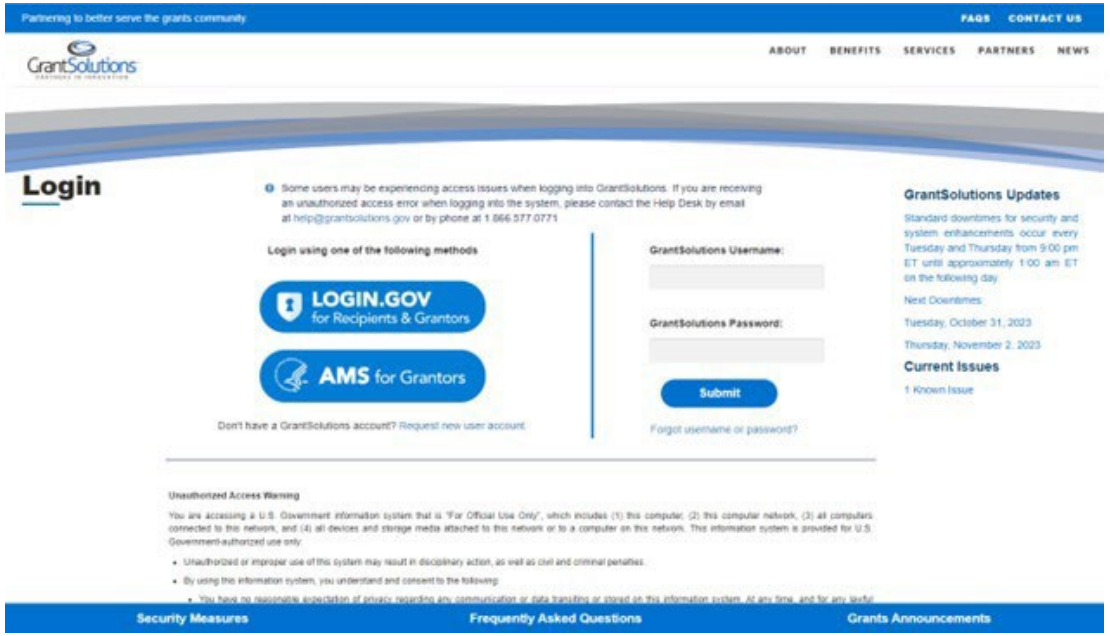
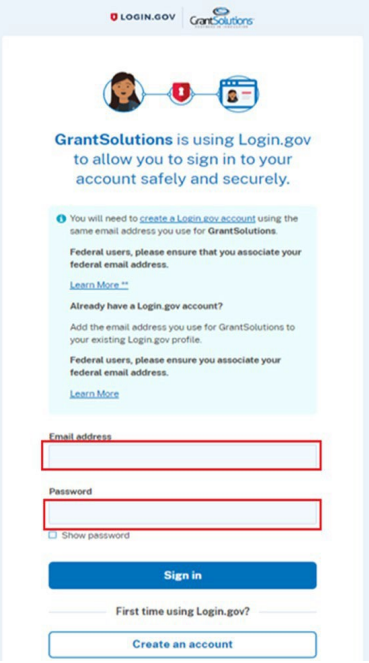
Login Process

- Click Login.gov for Recipients & Grantors

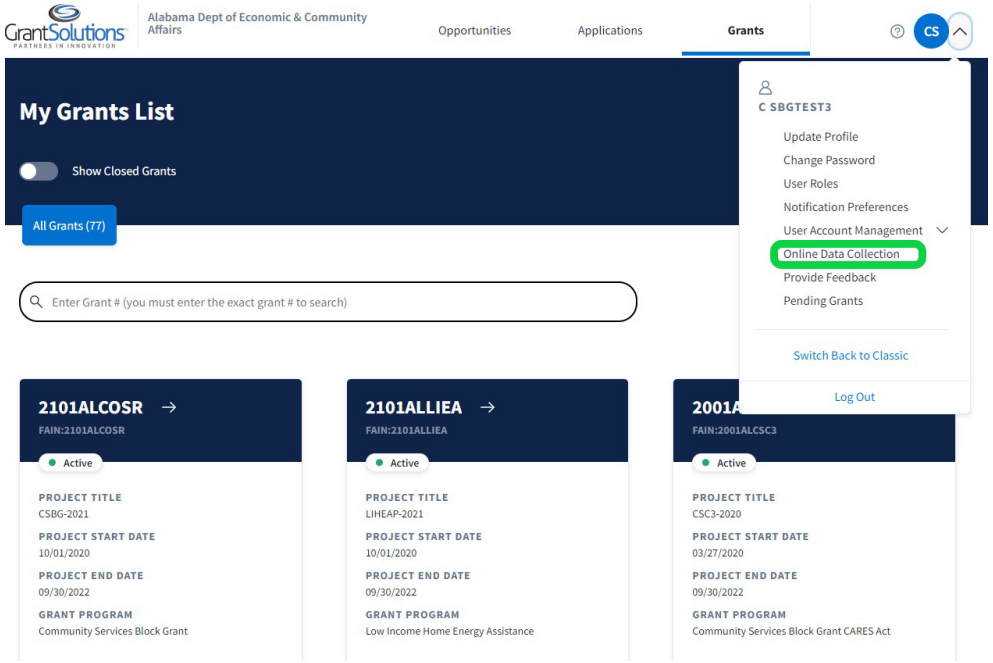


- Enter the email address associated with the GrantSolutions account in the Email address field



Selecting OLDC

- GrantSolutions “My Grants List”
- Select "Online Data Collection" from dropdown next to your initials (top right of screen).



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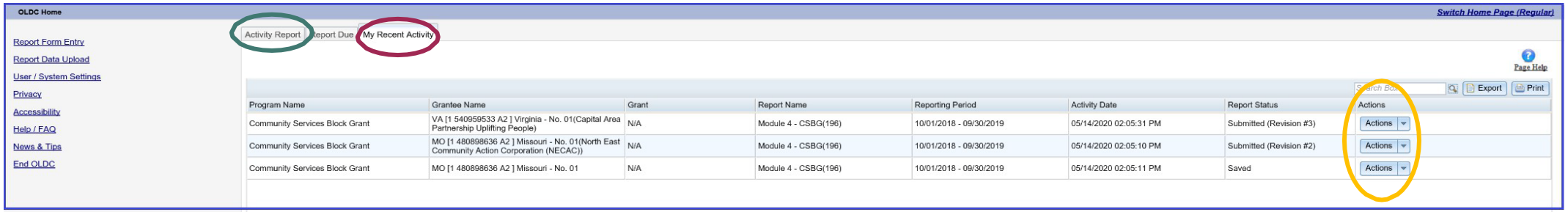
OLDC Home Tabs

- **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



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Answer in the chat…

Where should you send completed GrantSolutions and OLDC new account requests to?

A. Your Data & Evaluation Specialist

B. help@grantsolutions.gov

C. Your Program Specialist

D. NASCSP

Answer in the chat…

Where should you send completed GrantSolutions and OLDC new account requests to?

A. Your Data & Evaluation Specialist

B. help@grantsolutions.gov

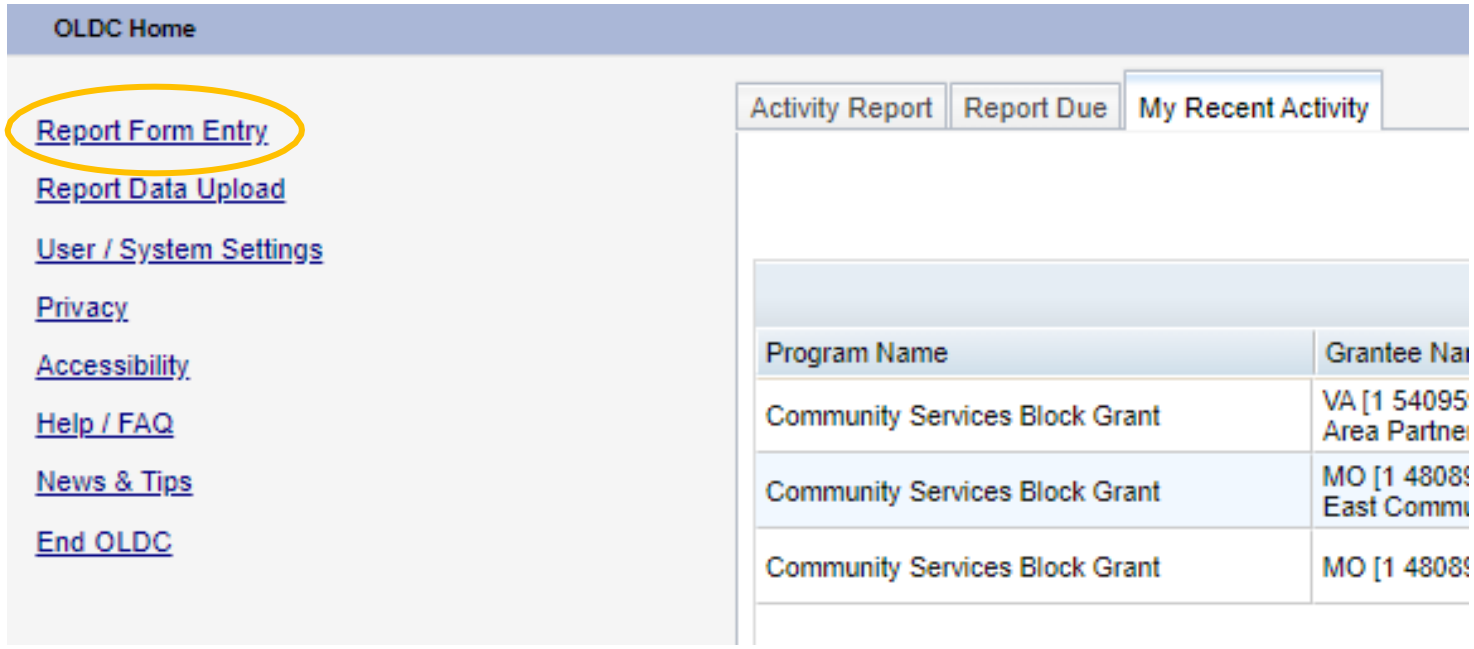
C. Your Program Specialist

D. NASCSP

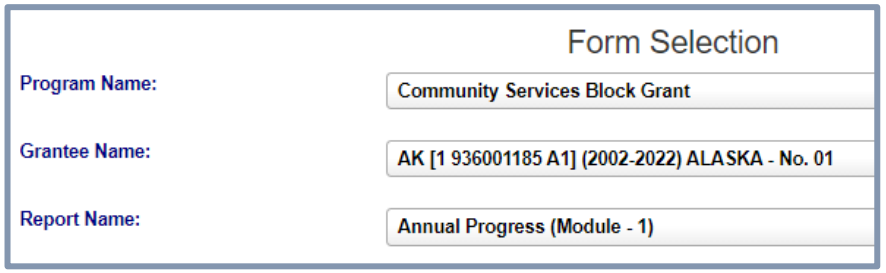
Accessing Annual Report Modules

Accessing Modules

- Select Report Form Entry
  - *Appears on the upper left-hand corner of the page*



Form Selection



- **Program Name**: Select Applicable Program Name
  - Community Services Block Grant
- **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)

Submitting Module 1

State Administration

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 “+”
- Federal Reporting Period: 10/01/2023 – 09/30/2024

Form Selection

Program Name: Community Services Block Grant

Grantee Name: CO [1 840644739 B9] (1993-2026) Colorado - No. 01

Report Name: Annual Progress (Module - 1)

Show 15 entries Search: 1

Reporting Period	Report Status	Actions
10/01/2025 - 09/30/2026		+
10/01/2024 - 09/30/2025		+
10/01/2023 - 09/30/2024		+
10/01/2022 - 09/30/2023	Submission Accepted by CO	
10/01/2021 - 09/30/2022	Submission Accepted by CO	

Pre-populates with FY24 data:

- ✓ **Year 2** of your FFY23 CSBG State Plan
- ✓ **Year 1** of your FFY24 CSBG State Plan

Report Sections

Report Sections

Program Name: Community Services Block Grant
Grantee Name: Colorado - No. 01
Report Name: CSBG Annual Report
Report Period: 10/01/2023 - 09/30/2024

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

on and creates a new blank section.

a print-friendly version.

View/Add Attachments | Validate | Print Full Report

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

View/Add Attachments | Validate | Print Full Report

Begin Editing

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

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

Direct Data Entry: Types of Responses

- 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.

- Radio Buttons: Allows for singular response

A1.b. Cabinet or administrative department of this lead agency

- Community Services Department
- Human Services Department
- Social Services Department
- Governors Office
- Community Affairs Department
- Other, describe

- Checkboxes: Allows for multiple responses

A.2. Please check additional programs administered by the State CSBG Lead Agency during the reporting year (FFY)

- Weatherization Assistance Program (WAP)
- Low Income Home Energy Assistance Program (LIHEAP)
- U.S. Department of Agriculture Programs
- U.S. Department of Housing and Urban Development (HUD) Programs
- Other, Describe

Pre-Populations

- Pre-Populations: Data populated from CSBG State Plan
  - Read-Only (Blue background) – Unable to edit
  - Editable (White background) – Able to edit
- Applicable to all Direct Data Entry options
- Upon initializing Module 1, first check if your CSBG eligible entity list (Section C) is pre-populated, if not, please email CSGBData@acf.hhs.gov

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 All (100%) State Standards	Actual Percentage Meeting All (100%) of State Standards	Delete
2019	100			0.00%	

White background
Able to edit

Blue background
Read-only

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 Organiza

Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Num
2019	100		

Add Section D - D2: 1 Add Delete Ma

Progress Indicators

Indicate the number of entities that met the following percentag

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%, and 70% progress indicators.	Number of Entities Assessed
	Number of Entities Assessed
	Number of Entities Assessed

Target vs. Actual Performance on the Organizat

Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Num
2019	100	10	

Add Section D - D2: 1 Add Delete Ma

Progress Indicators

Indicate the number of entities that met the following percentag

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%, and 70% progress indicators.	Number of Entities Assessed
	10
	Number of Entities Assessed
	10
	Number of Entities Assessed
	10

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

Target vs. Actual Performance on the Organizational Standards

Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met All (100%) State Standards	Actual Percentage Meeting All (100%) of State Standards	Delete
2019	100			0.00%	

BEFORE

Target vs. Actual Performance on the Organizational Standards

Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met All (100%) State Standards	Actual Percentage Meeting All (100%) of State Standards	Delete
2019	100	10	9	90.00%	

AFTER
(Auto-Calculated)

Cell Level Attachments

- Attachments do not transfer over
- Attachments allow you to add additional information
- Select the paperclip to attach documents
- File naming convention should include the annual report question number
- OCS only accepts Cell Level Attachments for Module 1

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

MODULE 1 QUALITY ASSURANCE

Review Sections for Errors

- From the Report Sections screen verify Section Status does not indicate "Saved – with Errors" for sections within the Module
- Review the sections to make the necessary corrections before submitting

View/Add Attachments | Validate | Print Full Report

Show 30 entries Search:

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

Clearing Errors

- Errors are at the top of each section in RED.
- Errors indicate questions which require a response.
- The RED text shows the question that requires a response.
- **[Goto Error] link -** directs page to the narrative.
  - For other questions, it will jump to that part of the Section.
- **[Long Description] link -** explains action required to clear error.
- Once a response is provided, select validate and the error should 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**"
- Report can be submitted with warnings

View/Add Attachments | Validate | Print Full Report

Show 30 entries

Search:

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

Reviewing Warnings

- Warnings are at the top of each section and are shown in ORANGE.
- Warning means that you may 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" link** takes you to the warning if it is a narrative.
  - For other questions, it will jump to that part of the Section.
- **"Long Description" link** explains what you need to do to clear the error.
- Upon review, if there is no response required, proceed to submit report.

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

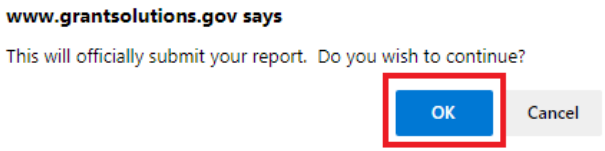
Show 30 entries

Search:

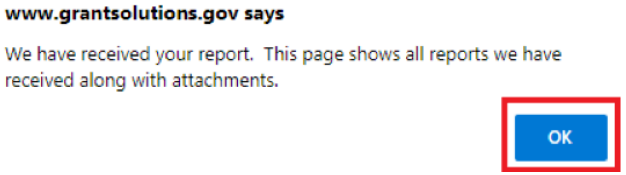
Section Name:	Perform Action:	Section Status:
Section A - Module 1 - State Administration	Select Action: Go	Saved -- Validated
Section B - Statewide Goals and Accomplishments	Select Action: Go	Saved -- Validated
Section C - CSBG Eligible Entity Update	Select Action: Go	Saved -- Validated
Section D -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

Verifying Submission

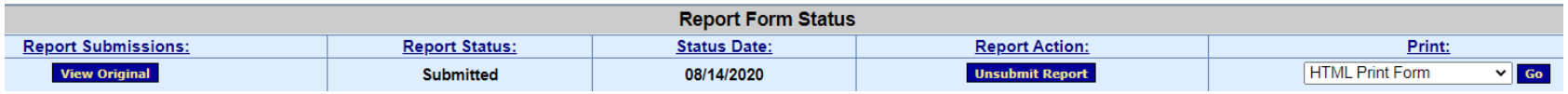
1. A pop-up message will appear saying: "*This will officially submit your report. Do you wish to continue?*" Click "*OK*" to continue.



2. The Report Form Status screen will appear, and a pop-up message will display: "*We have received your report. This page shows all reports we have received along with attachments.*" Click ***OK***.



4. You will see the report now shows as Submitted on the Report Form Status page.



Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submitted	08/14/2020	Unsubmit Report	HTML Print Form Go

Submitting Modules 2 and 4

Modules 2 and 4 Key Functions

Individual and Family

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

Exporting to XML

Go to the Outstanding Errors and Warnings tab to find the "XML Export" button.

XML Export

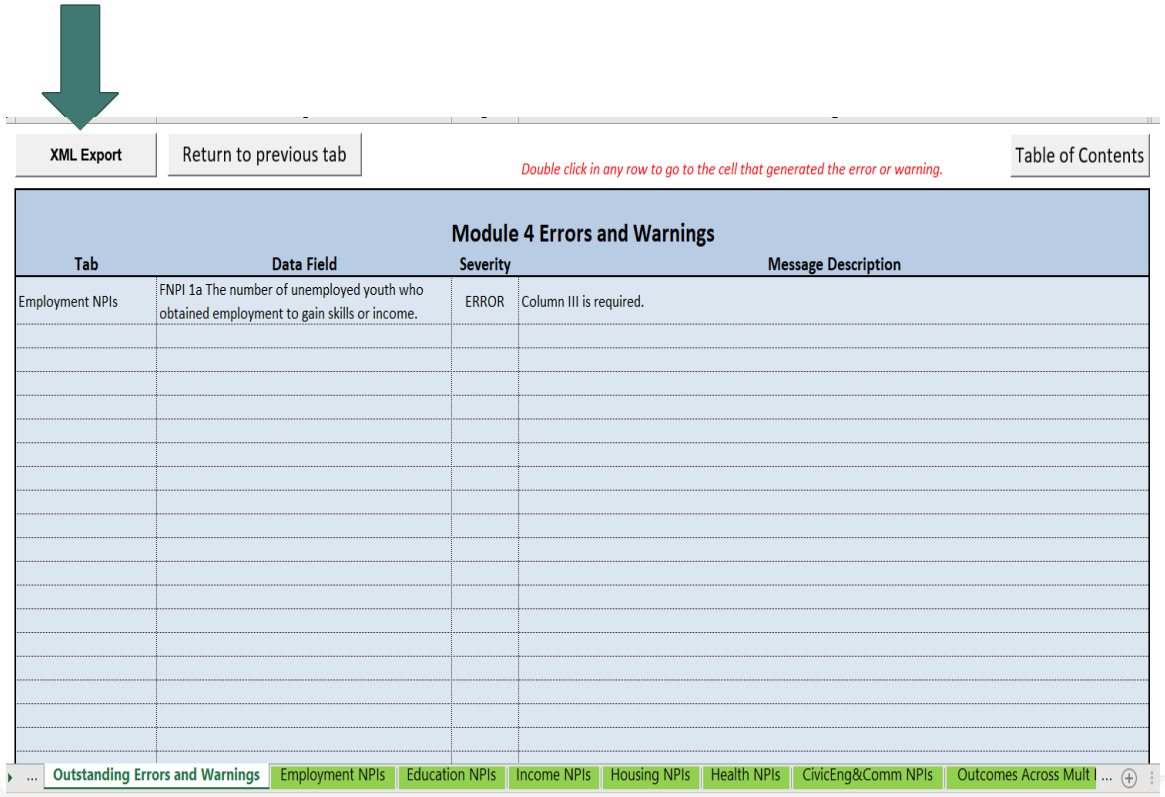
Double click in any row to go to the cell that generated the error or warning.

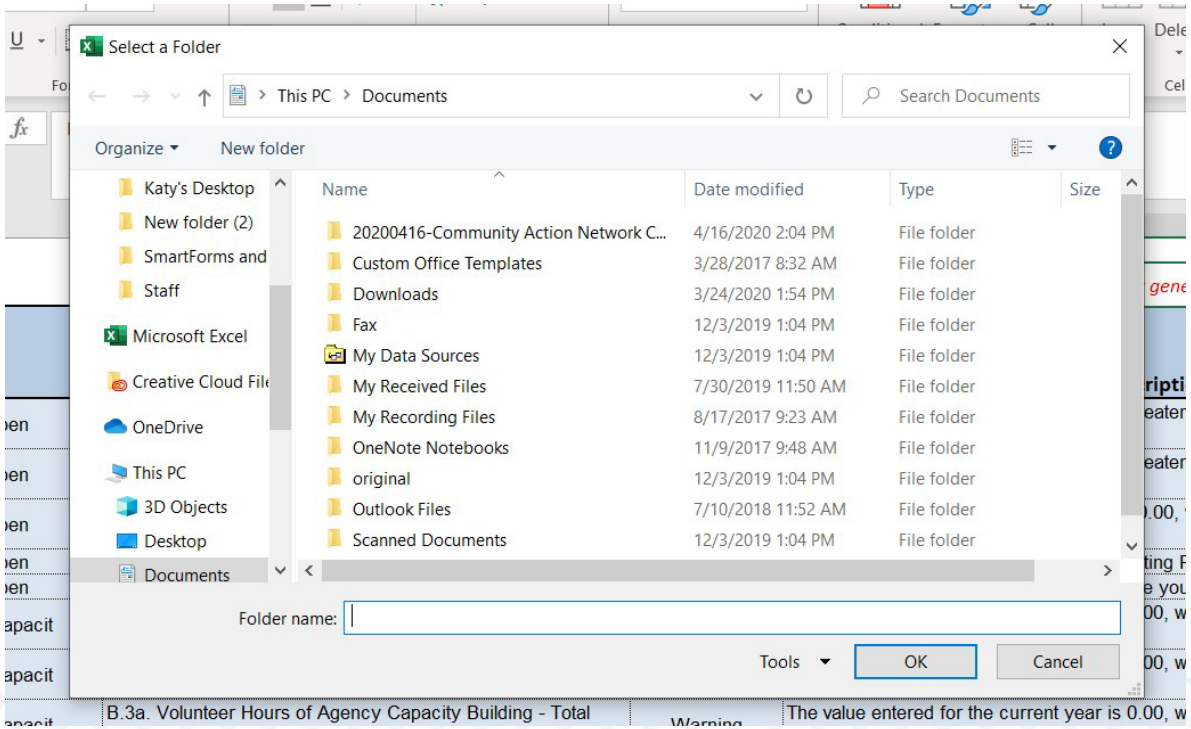
Module 2 Errors and Warnings

Tab	Data Field	Severity	Message Description
Section A. Local CSBG Expen	A.2b. CSBG Expenditures Domains - Education and Cognitive Development	Warning	The value entered for the current year is greater than $0.00, while last year, the value reported here was $0.00.
Section A. Local CSBG Expen	A.2i. CSBG Expenditures Domains - Agency Capacity Building	Warning	The value entered for the current year is greater than $0.00, while last year, the value reported here was $0.00.
Section A. Local CSBG Expen	A.3. CSBG Expenditures Domains - Administration	Warning	The value entered for the current year is $0.00, while last year, the value reported here was greater than $0.00.
Section A. Local CSBG Expen	A.1 CSBG Eligible Entry Reporting Period	ERROR	Select only one CSBG Eligible Entry Reporting Period
Section A. Local CSBG Expen	A.4 - Details on Agency Capacity Building Funded by CSBG	ERROR	You must select at least one checkbox since you reported funds in A.2i.
Section B. Local Agency Capacit	B.2a. Hours of Agency Capacity Building - Board Members	Warning	The value entered for the current year is 0.00, while last year, the value reported here was greater than 0.00.
Section B. Local Agency Capacit	B.2b. Hours of Agency Capacity Building - Agency Staff	Warning	The value entered for the current year is 0.00, while last year, the value reported here was greater than 0.00.
Section B. Local Agency Capacit	B.3a. Volunteer Hours of Agency Capacity Building - Total Hours	Warning	The value entered for the current year is 0.00, while last year, the value reported here was greater than 0.00.
Section B. Local Agency Capacit	B.3a.1. Volunteer Hours of Agency Capacity Building - Low-Income Hours	Warning	The value entered for the current year is 0.00, while last year, the value reported here was greater than 0.00.
Section B. Local Agency Capacit	B.4c. Staff with Certifications - CCAP	Warning	The value entered for the current year is 0, while last year, the value reported here was greater than 0.
Section B. Local Agency Capacit	B.4e. Staff with Certifications - Family Development	Warning	The value entered for the current year is 0, while last year, the value reported here was greater than 0.
Section B. Local Agency Capacit	B.4g. Number of Staff with Home Energy Professional Certifications	Warning	The value entered for the current year is 0, while last year, the value reported here was greater than 0.
Section B. Local Agency Capacit	B.4g.1. Number of Energy Auditors	Warning	The value entered for the current year is 0, while last year, the value reported

Instructions | Outstanding Errors and Warnings | Section A. Local CSBG Expen | Section B. Local Agency Capacit | Section C. Local CSBG Resources

Exporting to XML continued

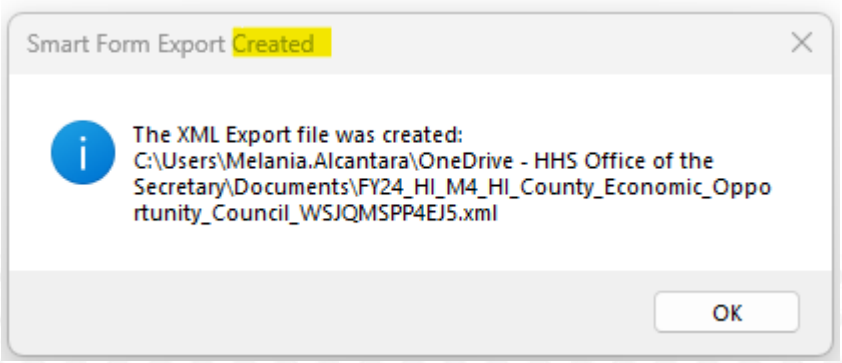


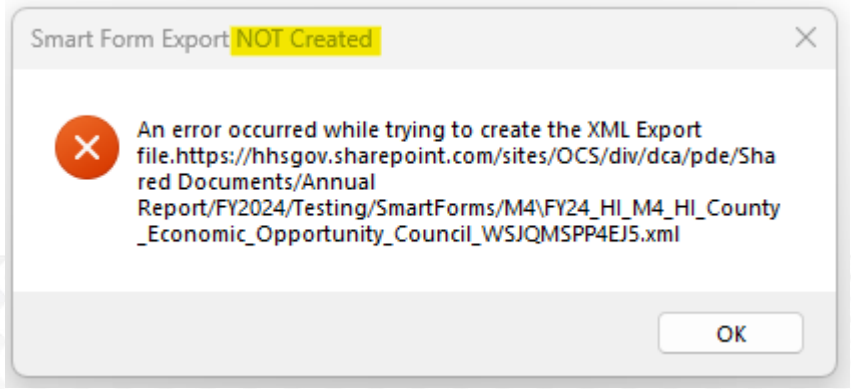


Click on the “XML Export” Button. A pop-up dialogue box should appear. Select the folder you want to drop the XML in. Click “OK.”

Exporting to XML Confirmation

- Verify that the XML exported
- If it does not export correctly, contact your Data and Evaluation Specialist.



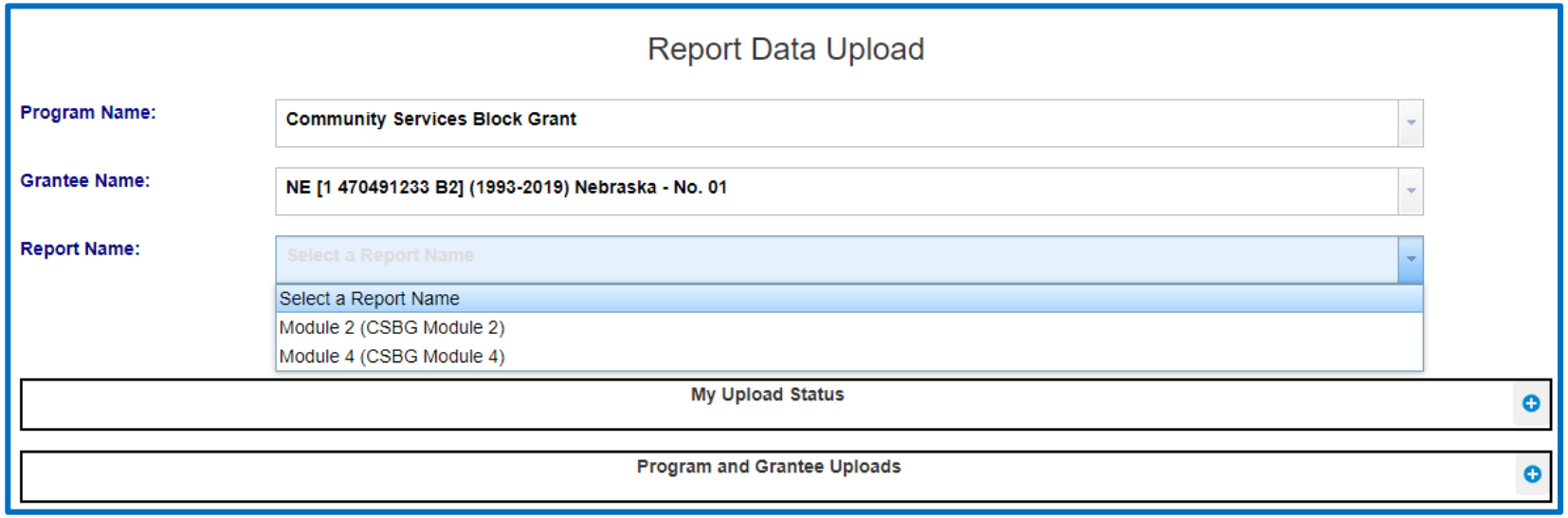


Report Data Upload

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

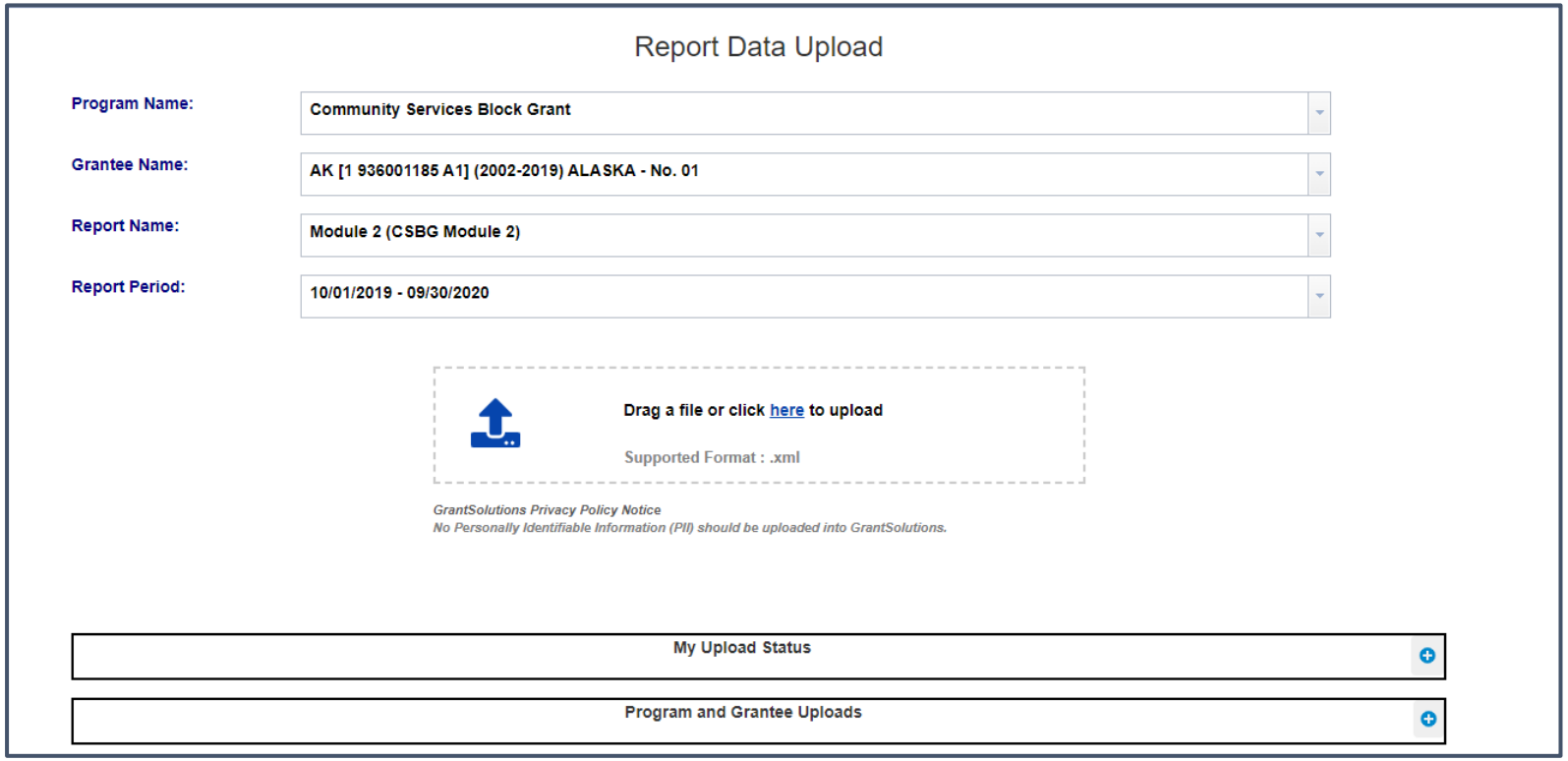
Report Data Upload

- **Program Name:** Select applicable program
  - Reports must be uploaded separately
- **Grantee Name:** Select your state [Only option]
- **Report Name:** Select the appropriate Module
  - Modules must be uploaded separately
  - All XMLs for the Module can be uploaded at one time



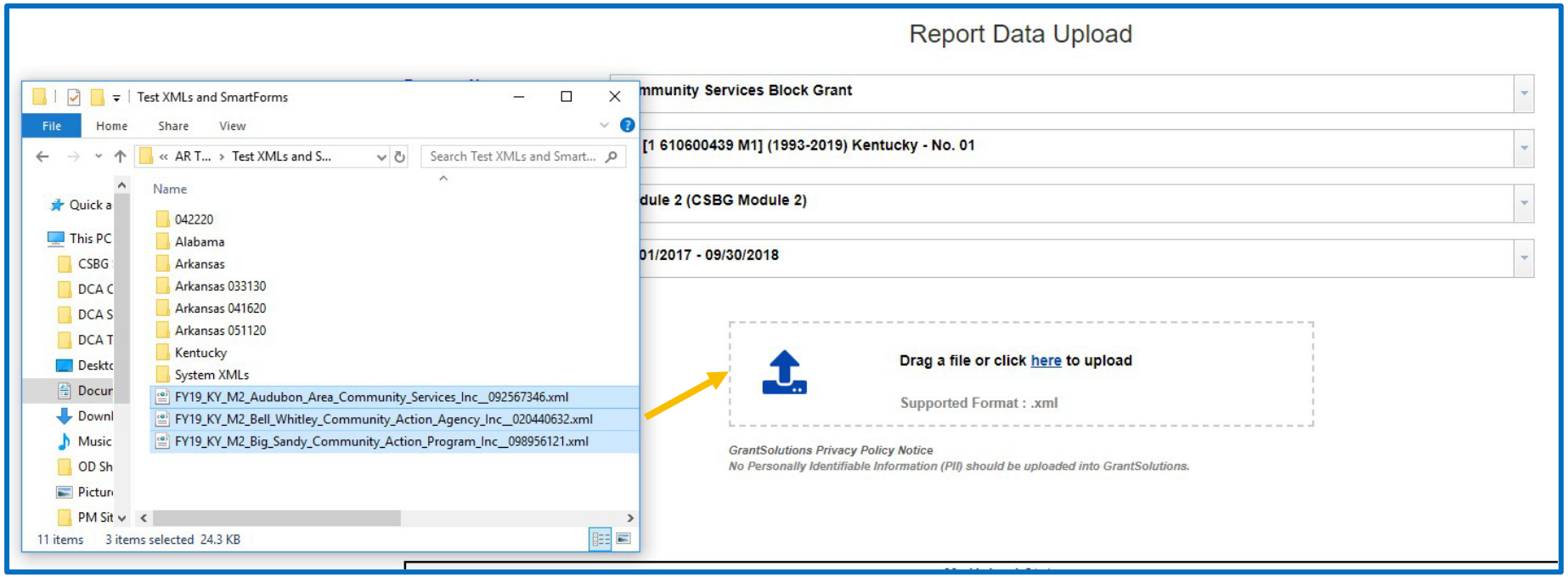
Report Data Upload – Report Period

- **Report Period:** Select 10/01/2023 – 09/30/2024
- Option to Add Files Appears



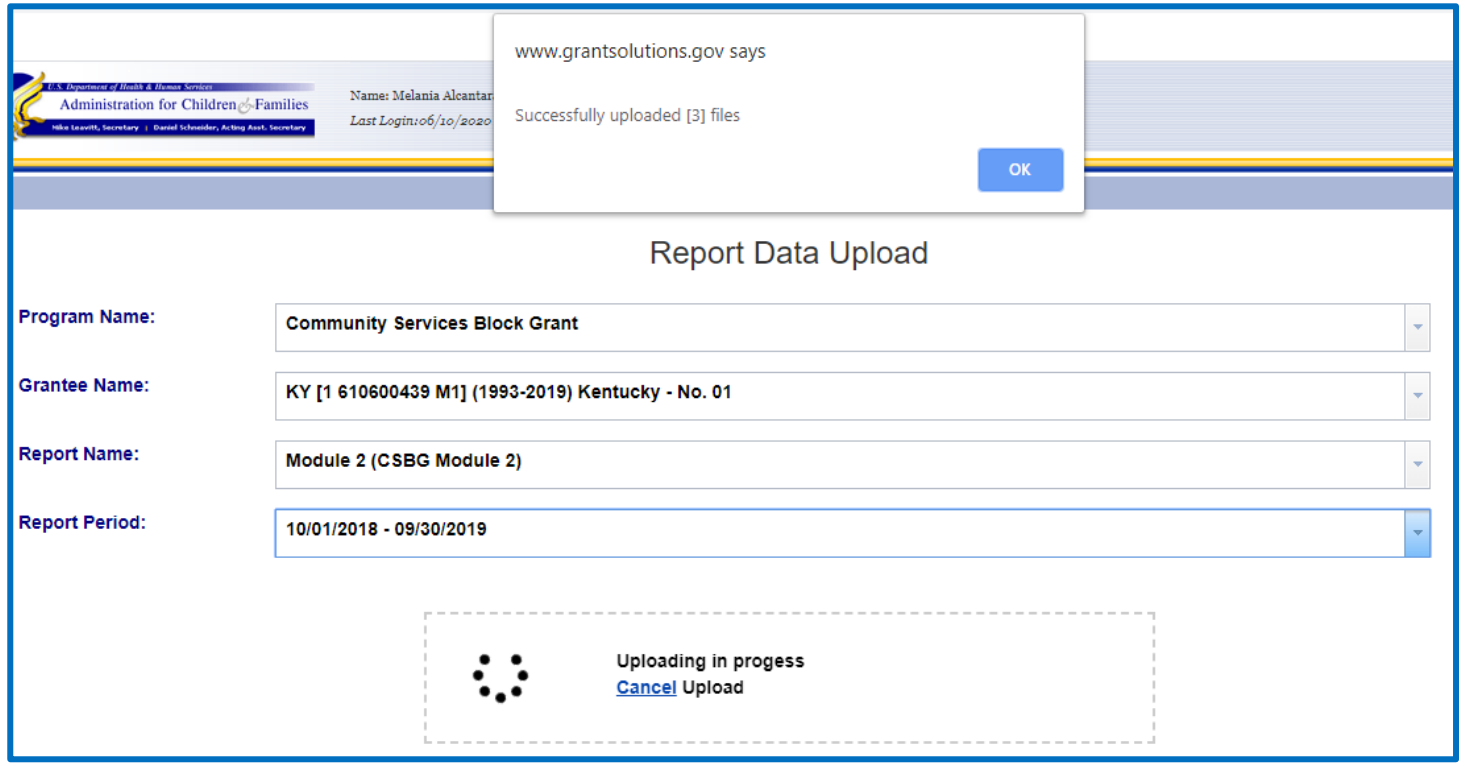
File Upload – Drag and Drop

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



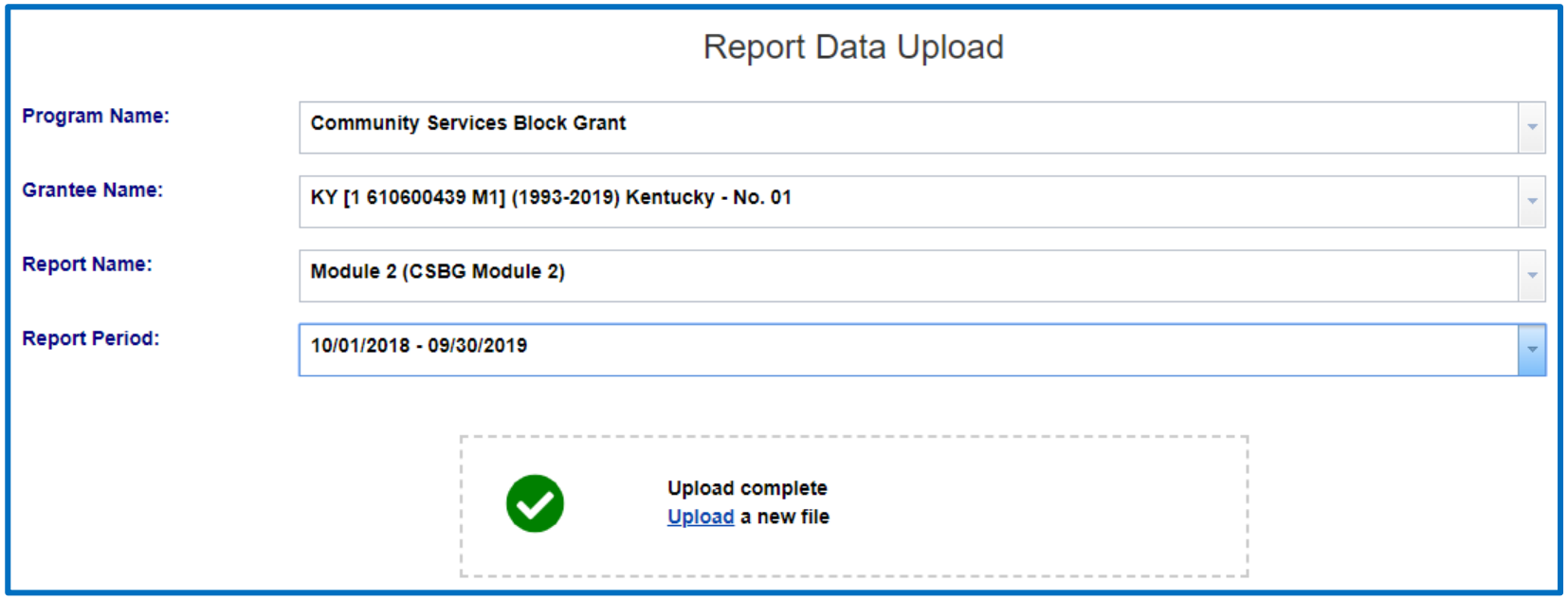
File Upload – Successful Upload

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



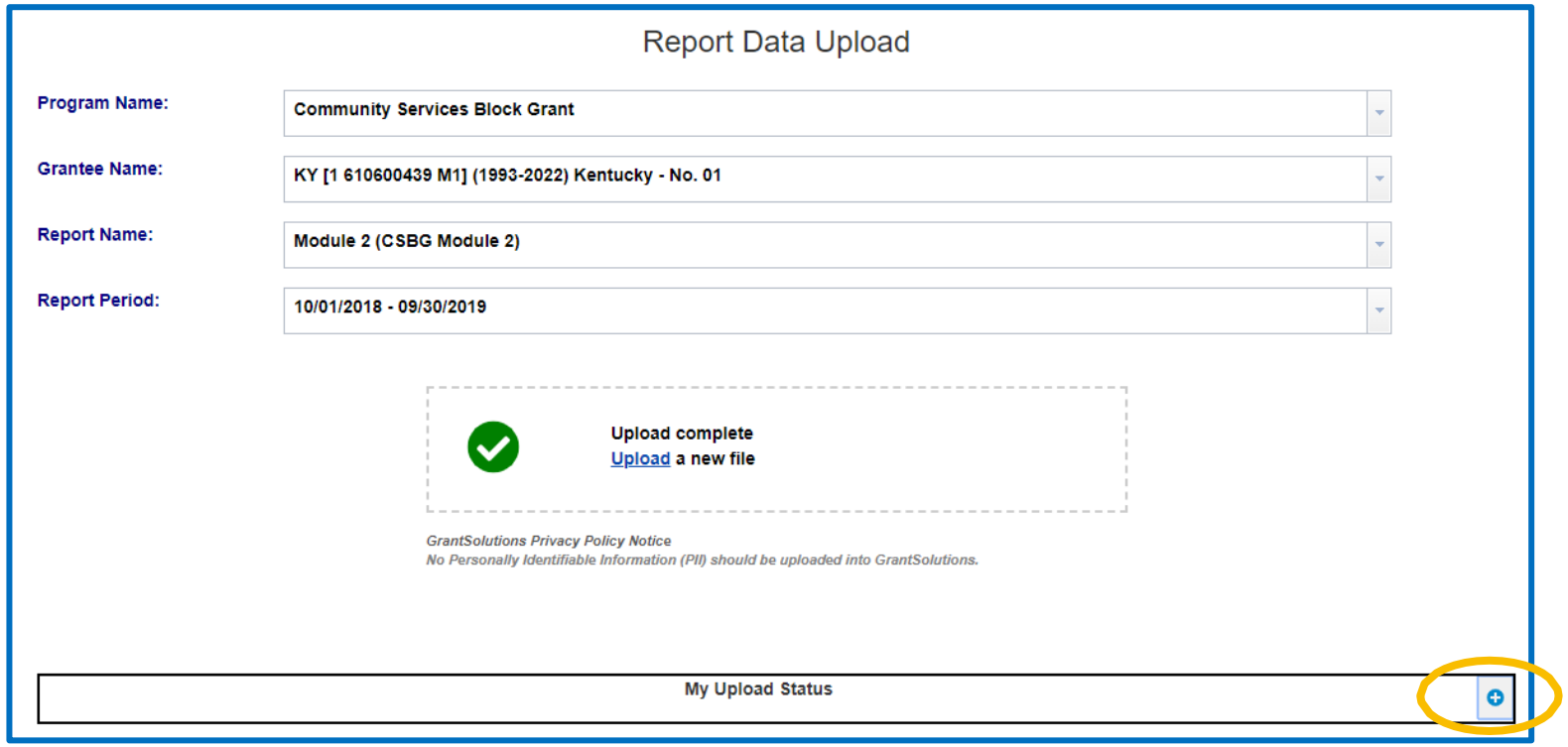
File Upload – Upload Complete

- File Upload box shows as “Upload Complete” with a green check mark signifies that you have uploaded a correct file and the system has accepted.



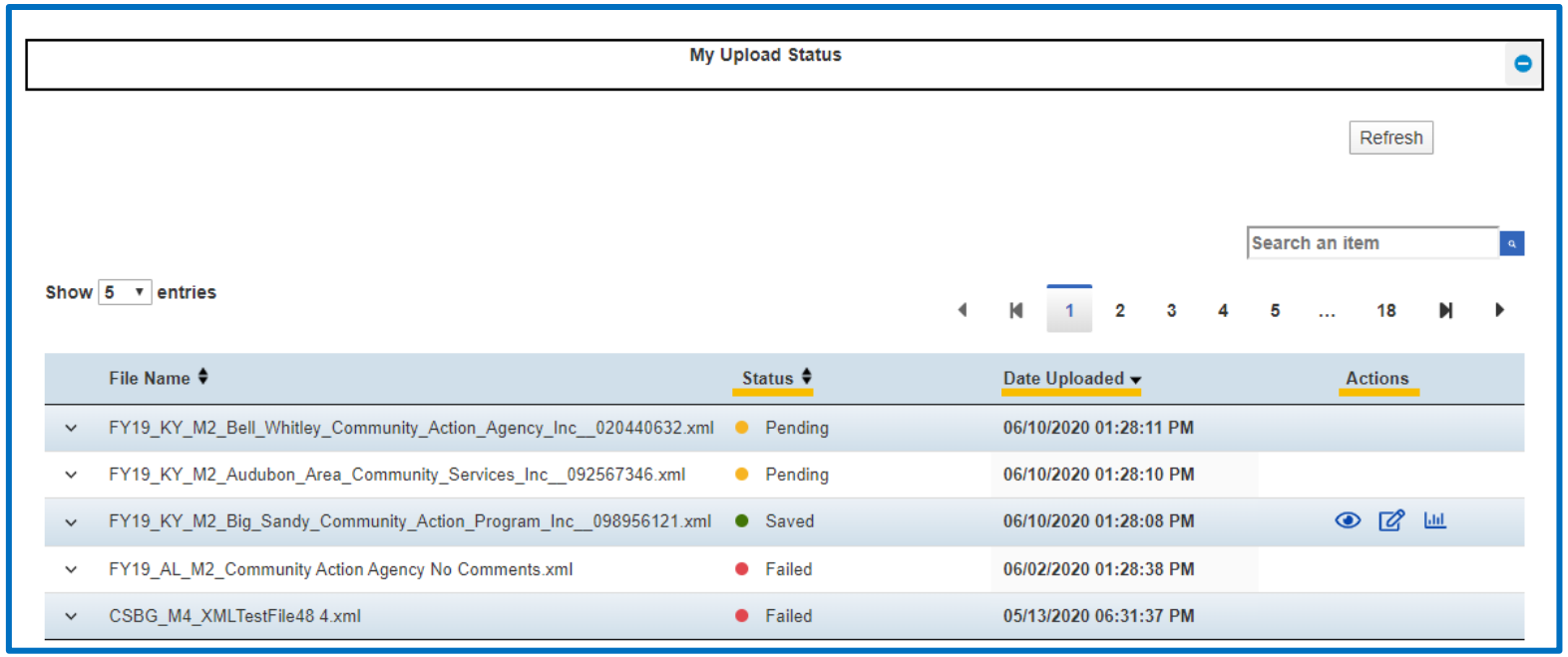
Review Upload Status

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



Upload Status

- **File Name:** Name of file
- **Status:** Provides the status of the document: Pending, Saved, or Failed
- **Date Uploaded:** Provides the date and time of upload
- **Actions:** Allows you to view the form and the status of that form



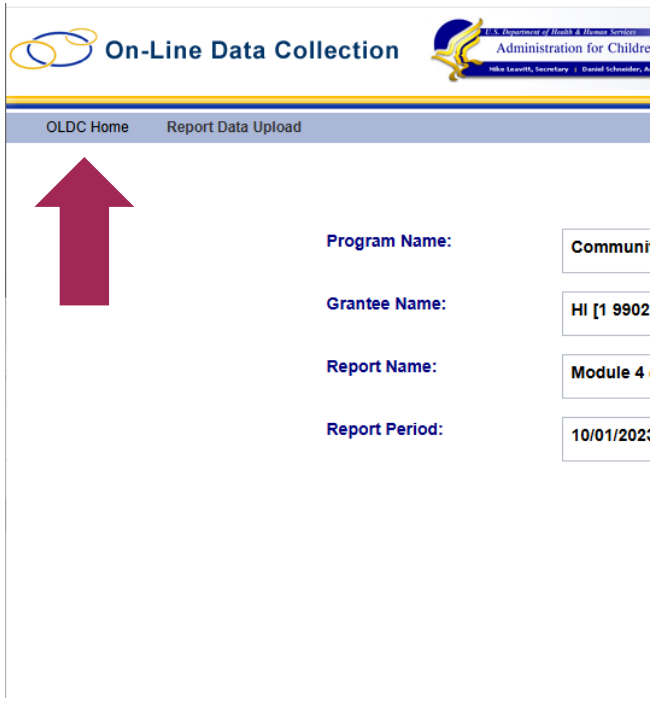
Upload Status: Status Defined

- **Pending**: System is "reading" document to check the correctness of the form and completing a virus scan which may take a few minutes
- **Saved**: Confirms that the form is correct and data saved
  - After all forms are in **Saved** status for a particular module, proceed to submission
- **Failed**: The form failed – email your Data and Evaluation Specialist and copy CSBGData@acf.hhs.gov

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

Navigate to Report Form Entry

- From Report Data Upload, select “OLDC Home”
- From OLDC Homepage, select “Report Form Entry”



Complete Report Form Entry Fields

- **Program Name**: Select Applicable Program Name
  - Community Services Block Grant
- **Grantee Name:** Select your state (Only option)
- **Report Name:** Select Applicable Report

Form Selection

Program Name:	Community Services Block Grant
Grantee Name:	HI [1 990266120 B4] (2014-2026) HAWAII - No. 01
Report Name:	Module 2 (CSBG Module 2)
Report Period:	10/01/2023 - 09/30/2024

Form Selection

Program Name:	Community Services Block Grant
Grantee Name:	HI [1 990266120 B4] (2014-2026) HAWAII - No. 01
Report Name:	Module 4 (CSBG Module 4)
Report Period:	10/01/2023 - 09/30/2024

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
  - State-level form will initially be in **Saved** status
- Eligible Entity forms are the individual forms for each entity and should all show as submitted
  - To view an Eligible Entity's data, select the View or the "Eye" icon next to that eligible entity

State-level Form →

Eligible Entity-level Forms

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	

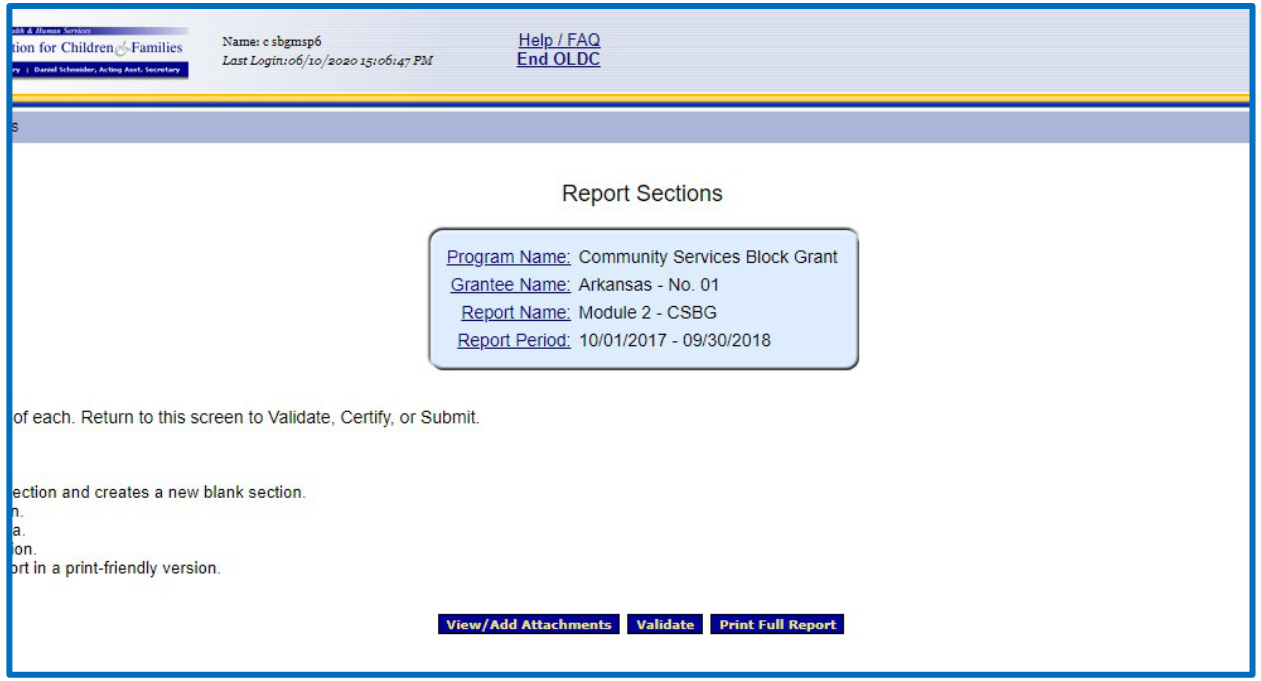
Editing the State-Level Form

- 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	

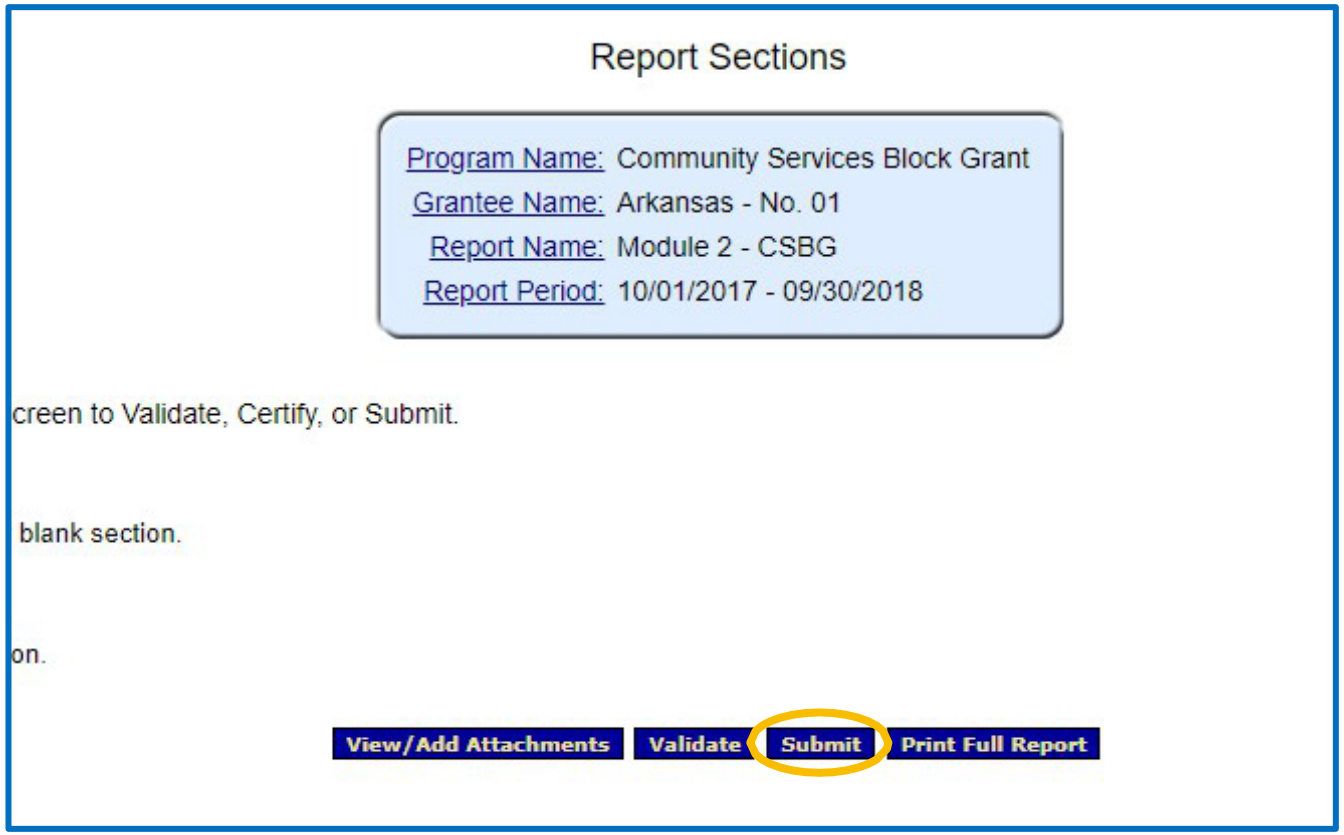
Attachments and Validate

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



Complete Submission

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



MODULE 2 AND 4 QUALITY ASSURANCE

What is a Complete Module 2 (M2) & Module 4 (M4)?

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

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

Program Name: Community Services Block Grant
Grantee Name: ALASKA - No. 02
Report Name: CSBG Annual Report
Report Period: 10/01/2023 - 09/30/2024

This screen displays the status of report forms and their revisions, along with attached files. To continue entering report form information, click on 'Grantee Selection'.

Report Form Status

Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submitted with Warnings	12/06/2024	Unsubmit Report	HTML Print Form Go

Submitting Module 3

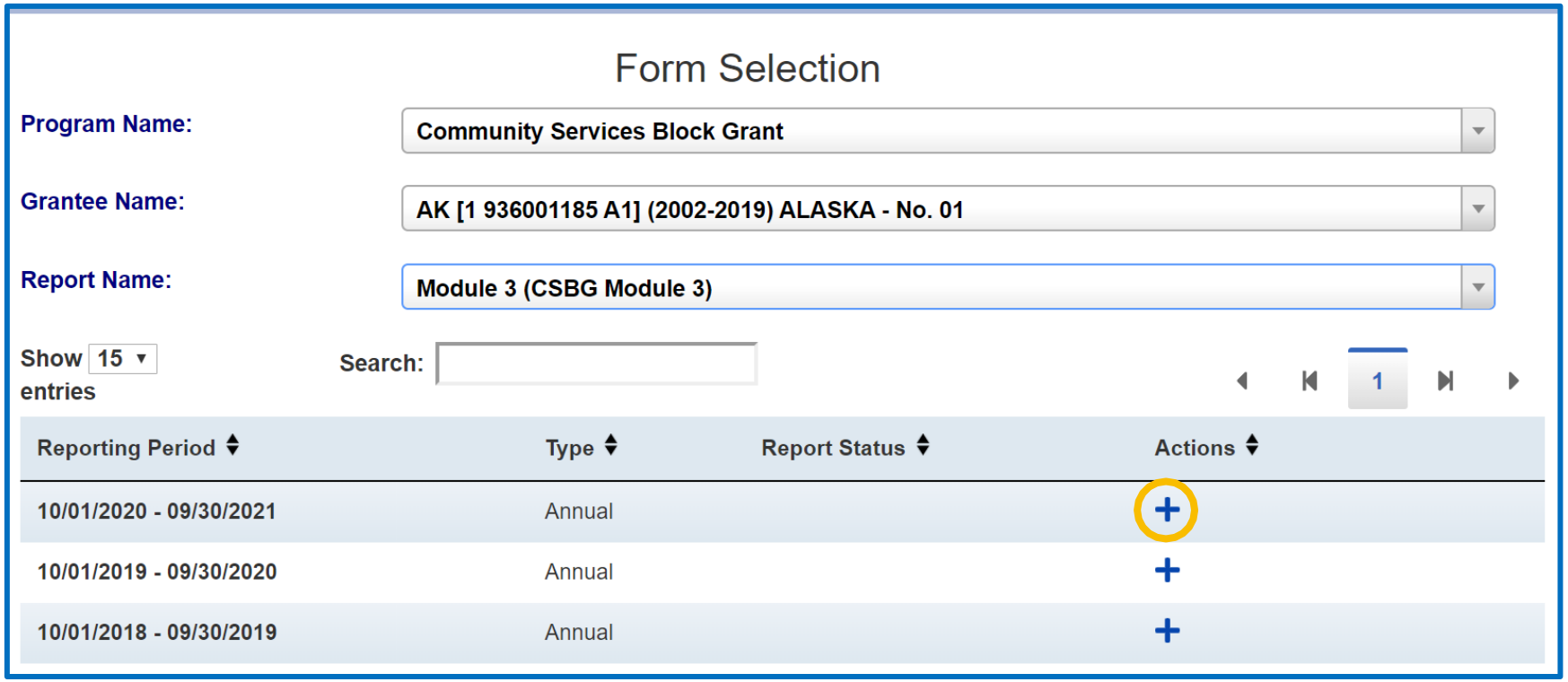
Module 3 Key Functions

Community Level

- Initialize
- Form-Level Attachments
- Validate
- Submit

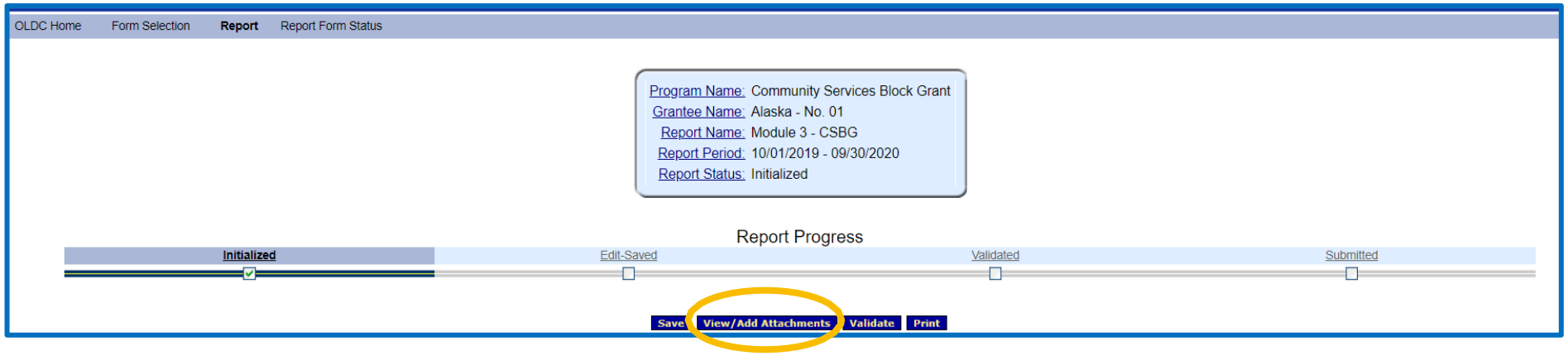
Initializing Module 3 Report

- **Report Period:** Select the "+"
  - **Federal Reporting Period:** 10/01/2023 – 09/30/2024



Form Level Attachments: Module 3

- Form Level Attachments allow you to add additional information by attaching files
- Select **View/Add Attachments** to attach one file at a time
- OCS only accepts Form Level Attachments for Module 3



Form Level Attachments: File Naming

- Filename:

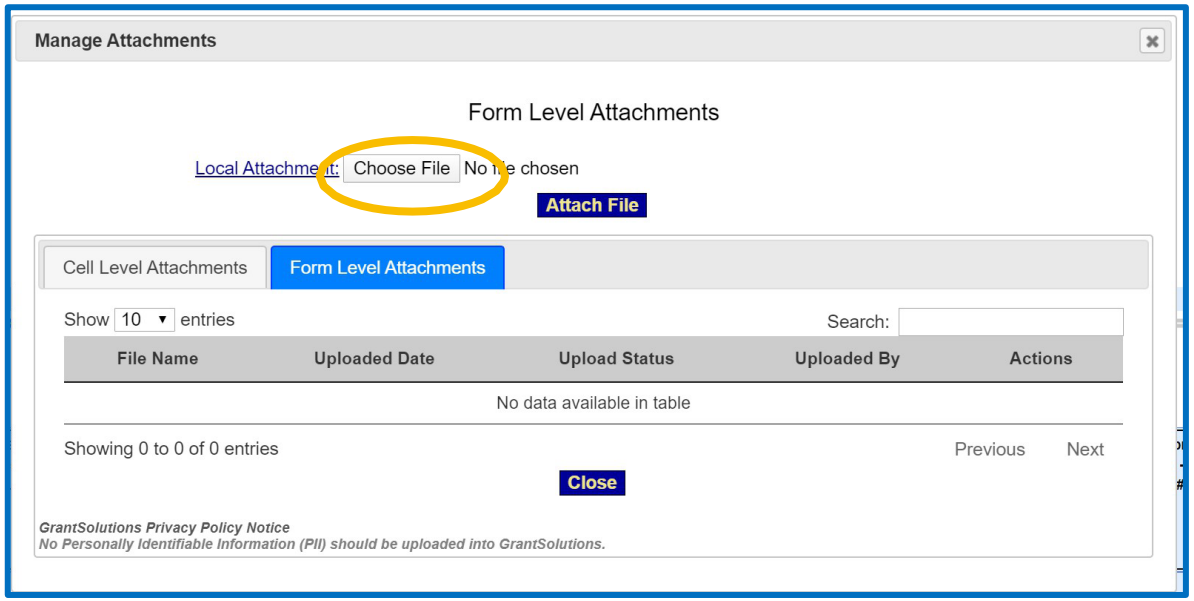
  FY_STATE ABBREVIATION_M3_ELIGIBLE ENTITY NAME_EE UEI_NumberofTotal

- Use abbreviations and acronyms if possible

Example:
FY24_AK_M3_Rural_Alaska_CAP_Inc_02024720_1of10

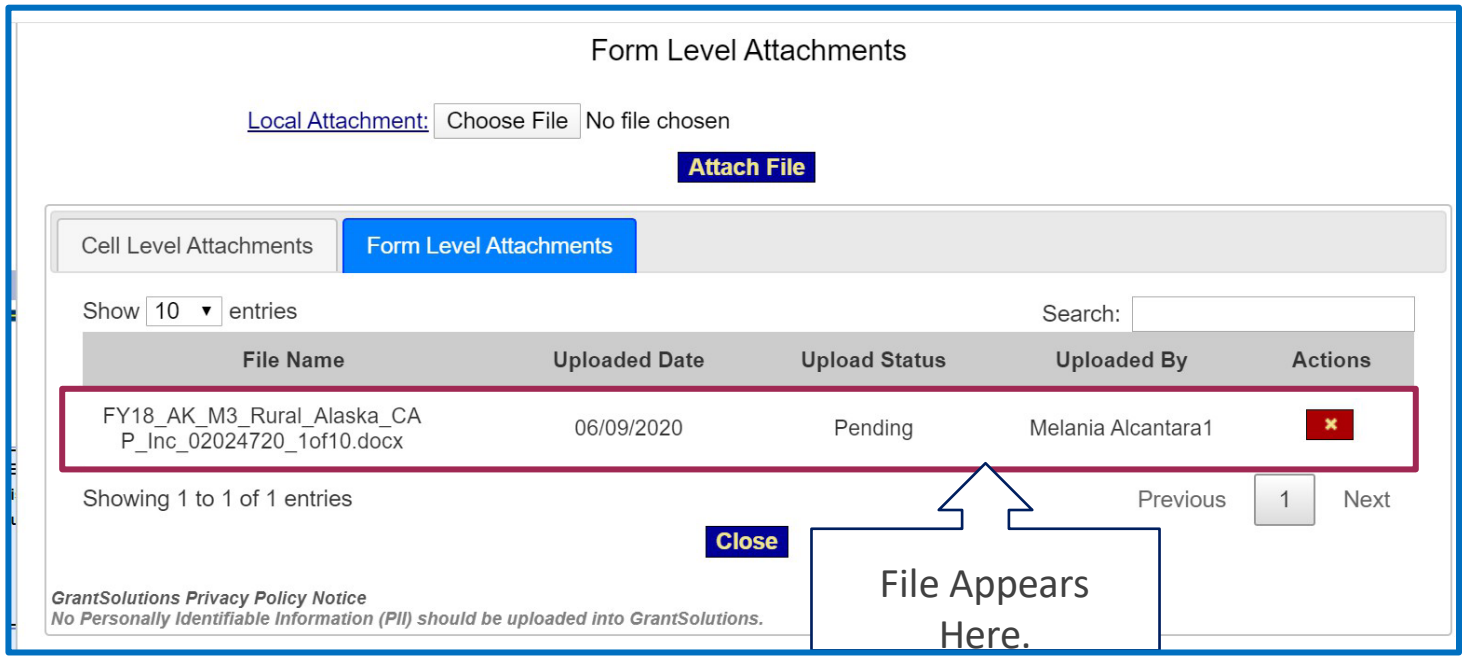
Form Level Attachments: Adding Individual Files

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



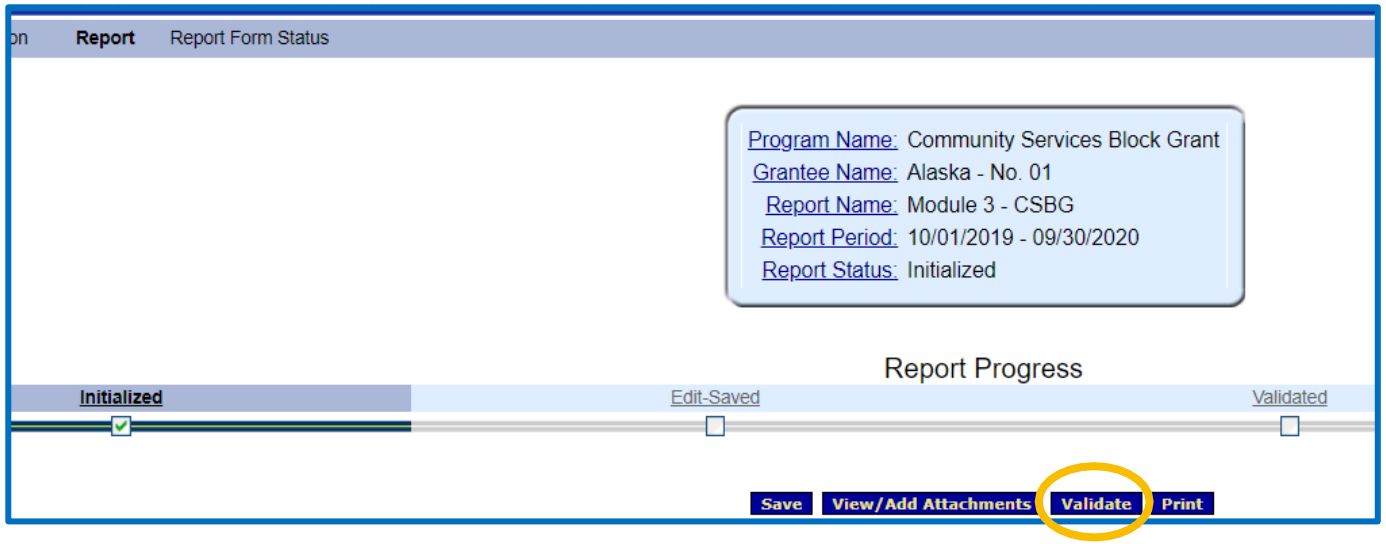
Form Level Attachments: Confirming Upload

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

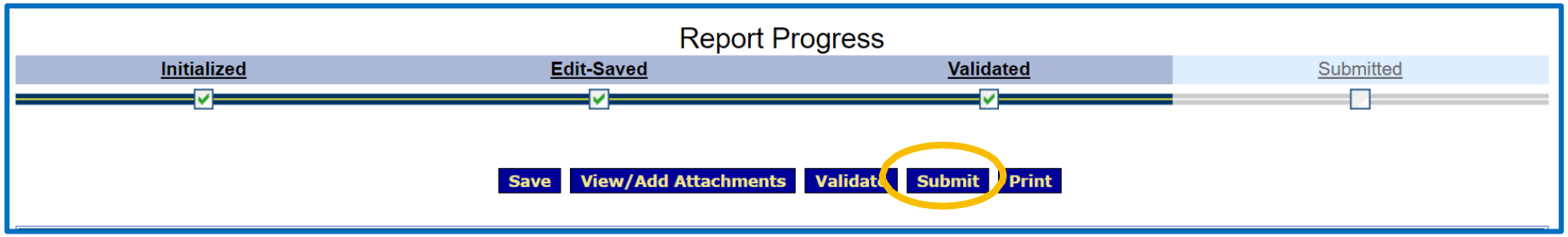


Module 3 Submission cont.

- Validate – No errors will appear



- Submit



MODULE 3 QUALITY ASSURANCE

NAMING CONVENTION

Use the following Naming Convention:

FY_State Abbreviation_M#_Eligible Entity Name_Number of Total

Example:

FY24_AK_M3_Rural_Alaska_CAP_Inc_1of5

Best Practices

Grant Recipients (States and Territories)

- **Initialize** M3 in OLDC only when there are initiatives to submit.
- **Submit** M3 only as an Excel attachment.
- **Review** submissions before uploading to OLDC.

Subrecipients (Eligible Entities)

- **Use** the Naming Convention for saving files.
- **Select** only domains, strategies, and outcomes that pertain to your initiative
- **Provide** outcomes when Interim or Final Outcomes are selected (A.13.)

Final Reminders

- Each module must be submitted separately.
- The Annual Report does not require certification.
- Module 1 is based on the federal fiscal year.
  - October 1, 2023 – September 30, 2024
  - Submit based on work completed during FFY24 with FFY24 funds.
- Modules 2–4 are based on the state reporting period.
  - Submit based on work and funds spent during that time.

Resources

Tools

- CSBG Annual Report Toolkit
- Vendor Portal
- Online Data Collection (OLDC) System

Trainings

- CSBG Events Calendar
- On-Demand Webinars (previously recorded)

CSBG Events Calendar

Listen

View | Edit | Revisions | Usage

Publication Date: July 3, 2023 **Current as of:** December 9, 2024

This page provides information on Community Services Block Grant (CSBG) events by fiscal year (FY) and quarter.

FY25

Quarter 1: October 1, 2024 — December 31, 2024

DATE	TIME	EVENT	PURPOSE	LINKS (AS APPLICABLE)
October 15, 2024	2:00-3:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff	Share highlights of data from the previous Annual Report, status updates on the congressional reporting, performance reporting, lessons learned, and overview of the process to review data.	FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff Recording
October 23, 2024	1:00-2:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Submitting the State Administration (Module 1)	Intended for State and Territory Administrators and state and territory program staff completing Module 1 of the CSBG Annual Report. The webinar will review the requirements and their connection to the CSBG State and Territory Plan.	FY24 CSBG Annual Report Webinar Series: Submitting the State Administration (Module 1) Recording
October 24, 2024	3:00-4:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Understanding the Tribal Annual Report and Tribal Annual Report (Short Form)	Intended for Tribal Administrators and Tribal Program Managers completing the annual report. The webinar will review the requirements and how to submit the report.	FY24 CSBG Annual Report Webinar Series: Understanding the Tribal Annual Report and Tribal Annual Report (Short Form) Recording

FY24 CSBG Annual Report Training

Understanding the CSBG Annual Report for Performance

- **October 15:** FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff Recording
- **October 23:** FY24 CSBG Annual Report Webinar Series: Submitting the State Administration (Module 1) Recording
- **October 24:** FY24 CSBG Annual Report Webinar Series: Understanding the Tribal Annual Report and Tribal Annual Report (Short Form) Recording
- **November 14:** Explaining Eligible Entity Expenditures, Capacity, and Resources Recording
- **November 19:** Capturing Community Level Transformation Slides
- **November 21:** Collecting Individual and Family Characteristics Slides

Leveraging Systems and Tools for Annual Report Submissions

- **December 3**: Using State Systems for Reporting
- **December 5:** Understanding and Troubleshooting SmartForms
- **December 9:** Accessing the Online Data Collection system

ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

CSBG
Community Services Block Grant

Technical Assistance

- **Federal Staff**
  - Program Specialist
  - Data and Evaluation Specialist
- **FY24 Annual Report Office Hours**
  - March 4, 2025
  - March 6, 2025
- **Targeted Training and Technical Assistance**
  - Email Data and Evaluation Specialist

Questions and Answers

- **Will there be one-on-one assistance?**

  You can request one-on-one assistance at any point by emailing your Data and Evaluation Specialist. Please copy CSBGData@acf.hhs.gov.

- **Is that the same as our CSBG Specialist? Or do we have a different Data and Evaluation Specialist?**

  Each region has two assigned staff members. The Program Specialist is the person you connect with on the day-to-day contact, and for example, who you get the regional quarterly invites from. The Data and Evaluation Specialist is the person who assists you with data, such as Annual Report. Both are listed on the federal contact page and work closely together.

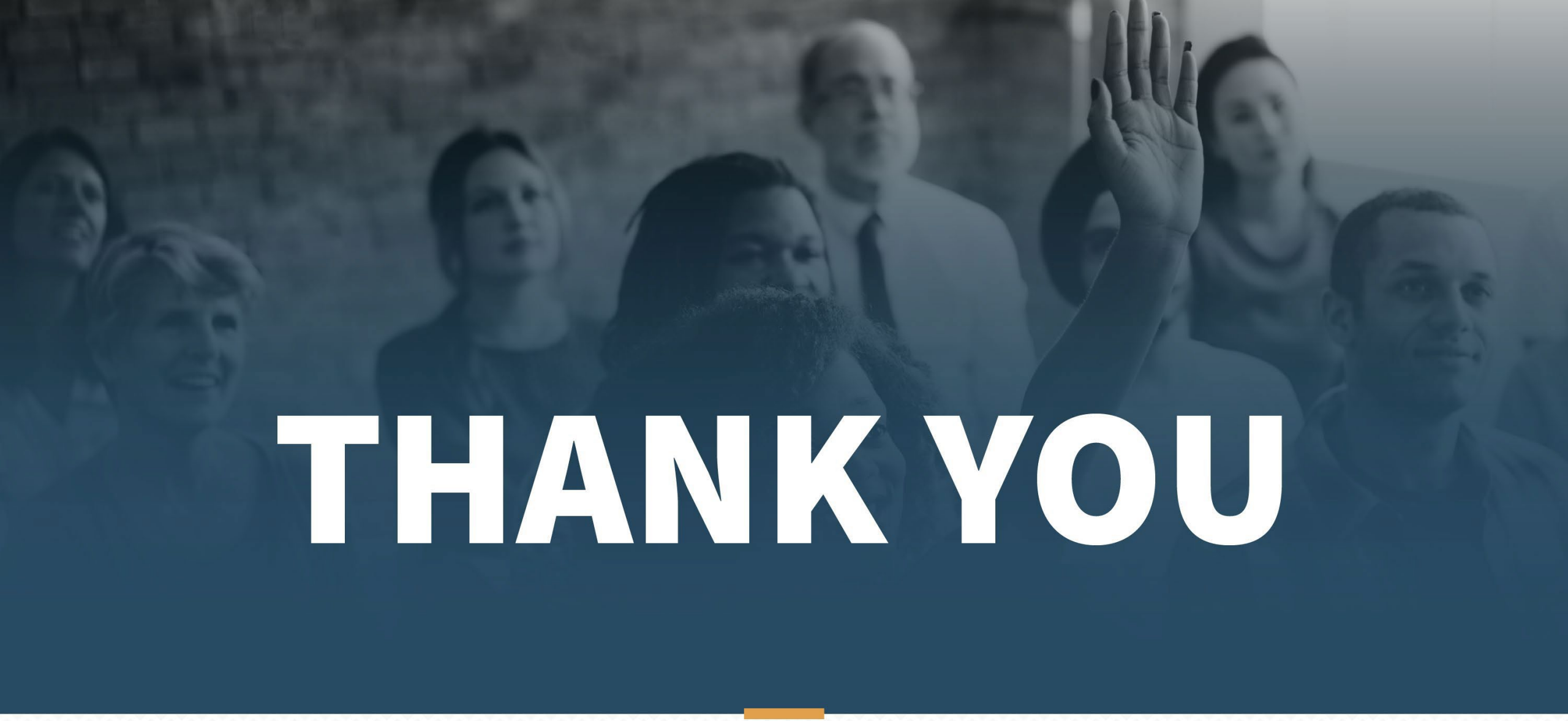
Questions and Answers

- **Is this for agencies to complete [submission of the Annual Report Modules in OLDC]?**

  All data entry and submissions steps are performed by state and territory grant recipients.

- **Do we need to submit separate comments for M2 and M4, or is one from with all comments acceptable?**

  We request that you submit one form with all comments for all CSBG eligible entities and for both Modules.



THANK YOU

ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

CSBG
Community Services Block Grant