



# **FY24 CSBG Annual Report Webinar Series**

## **Using State Systems for Reporting**

**Office of Community Services (OCS)**  
**Division of Community Assistance (DCA)**

December 3, 2024

# Meet the Presenters



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OCS, DCA



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Research Director  
NASCS

# Webinar Agenda

- Welcome
- Definitions
- Process
- XML and Common Issues Explained
- CSBG Annual Report Revisions
- Vendor Portal
- Resources and Reminders



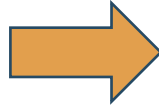
# DEFINITIONS

# Definition: State Database or System

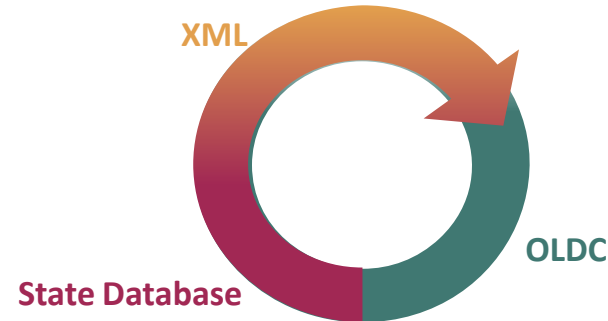
- Any system used in lieu of a SmartForm to collect data from CSBG eligible entities for the purpose of reporting the CSBG Annual Report.
- These databases can be:
  - Vendor Built and Designed
  - State Built and Designed
- The database then exports the data to an XML file to upload to the On-Line Data Collection (OLDC) via GrantSolutions.

# Definition: Extensible Markup Language (XML)

XML, or Extensible Markup Language, lets you define and store data in a shareable manner. XML supports information exchange between computer systems such as websites, databases, and third-party applications.



Allows you to export the data from your database to a file that OLDC can read.



# Definition: Validations

- A set of written rules that check the validity or accuracy of each data point.
  - Built into SmartForms
  - Recommended to build into State Databases
- Smoothens the Federal Quality Assurance Review (FQAR)
- **Validations** file in the **Vendor Portal**

# REPORTING REQUIREMENTS



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



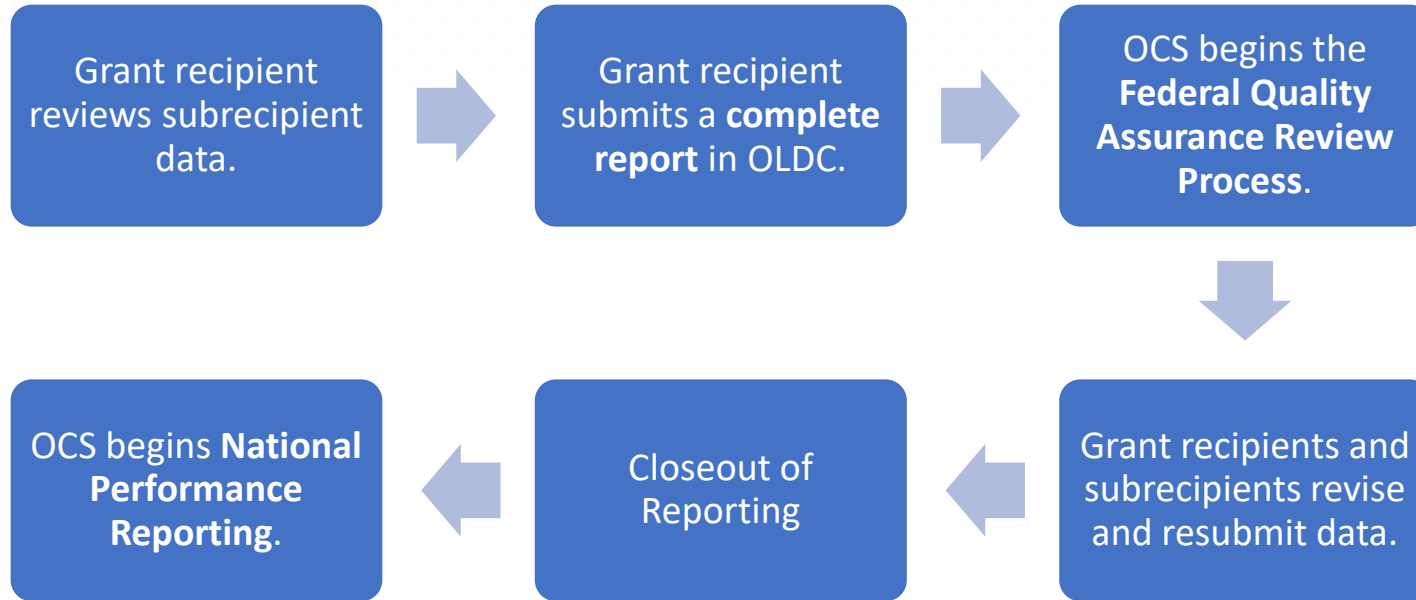
# It's in the Act

“

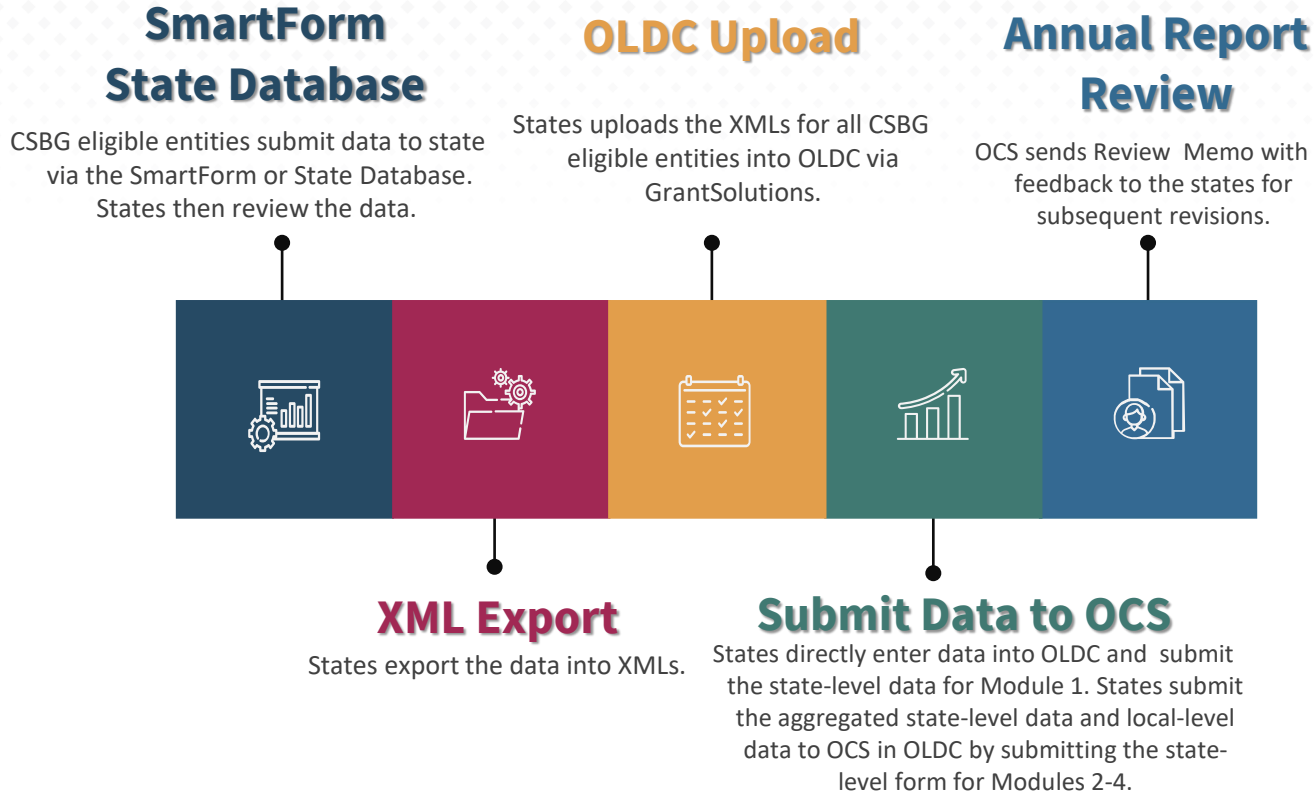
Each State shall **annually prepare and submit** to the Secretary a report on the **measured performance** of the State and the **eligible entities in the State**... any information collected by the State relating to such performance. Expenditure of funds...including an **accounting of funds spent on administrative costs** by the State and **the eligible entities**...and **direct delivery of local services** ... information on the **number of and characteristics of clients served**...

CSBG Act, Section 678E(a)(2), 42 USC § 9917

# FY24 CSBG Annual Report Process



# Grant Recipient Submits Complete Report



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

- Successful upload 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 CSBG lead agency.

**Collection**

- Via state database or **SmartForms**


 States Review Data and **Export to XMLs**.

**XML Export**

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

**OLDC Upload**

- XMLs Save (OLDC auto-function)

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

**Submit Data to OCS**

**Note:** Module 3 SmartForms are attached to the Module 3 Form within OLDC.

# General Information

- There are separate XMLs for Module 2 and Module 4.
  - Each eligible entity that received funding in FY24 must submit an individual XML.
  - Module 3 does not have an XML – must be attached as a SmartForm.

## Key Reminders



The CSBG state lead agency must upload the XML into OLDC.



Vendors do not have access to OLDC.



Data cannot be transferred directly from systems to OLDC.



## Answer in the chat...

- **What is a complete Module 2 and 4 submission?**
  - A. Upload of XMLs for current CSBG eligible entities.
  - B. Upload of XMLs for all CSBG eligible entities that received funding in FY24 for both Module 2 and 4.
  - C. Upload of XMLs for CSBG eligible entities that submitted their data on time.
  - D. Submission of the state-level form for both Module 2 and 4.

*There may be more than one answer.*



## Answer in the chat...

- What is a complete Module 2 and 4 submission?
  - A. Upload of XMLs for current CSBG eligible entities
  - B. Upload of XMLs for all CSBG eligible entities that received funding in FY24 for both Module 2 and 4.**
  - C. Upload of XMLs for CSBG eligible entities that submitted their data on time.
  - D. Submission of the state-level form for both Module 2 and 4.**



# XML and COMMON ISSUES EXPLAINED

# XML Composition

- **XML name – identifies the XML**
  - CSBG\_M2
  - CSBG\_M4
- **9 Additional Fields (Headers)**
  - Specific fields with defined data (provided via Vendor Portal) that allows OLDC to route the XML correctly
- **Annual Report Data fields**
  - Fields that correspond directly with the data points from the CSBG Annual Report

```

@CSBG_Q2 xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="@CSBG_Q2.xsd">
  @GRANTEENAME%</GRANTEENAME>
  @ELIGIBILITYEVENT%</ELIGIBILITYEVENT>
  @orgabbrev%</orgabbrev>
  @programcrnym%</programcrnym>
  @UEID%</UEID>
  @reportPeriodStartDate:2022-10-01/</reportPeriodStartDate>
  @reportPeriodEndDate:2023-09-30/</reportPeriodEndDate>
  @grantNumber%</grantNumber>
  @subGrantee%</subGrantee>
  @H2A1%</H2A1>
  @H2A1aJulyToJune%</H2A1aJulyToJune>
  @H2A1bOctToSept%</H2A1bOctToSept>
  @H2A1cJanToDec%</H2A1cJanToDec>
  @H2A2aEmployment%</H2A2aEmployment>
  @H2A2bEducation%</H2A2bEducation>
  @H2A2cIncome%</H2A2cIncome>
  @H2A2dHousing%</H2A2dHousing>
  @H2A2eHealth%</H2A2eHealth>
  @H2A2fCivic%</H2A2fCivic>
  @H2A2gServices%</H2A2gServices>
  @H2A2hLinkages%</H2A2hLinkages>
  @H2A2iCapacity%</H2A2iCapacity>
  @H2A2jOther%</H2A2jOther>
  @H2A2kTotal%</H2A2kTotal>
  @H2A3Admin%</H2A3Admin>
  @H2A4CommunityNeeds%</H2A4CommunityNeeds>
  @H2A4iDataManagement%</H2A4iDataManagement>
  @H2A4jOther%</H2A4jOther>
  @H2A4kStrategicPlanning%</H2A4kStrategicPlanning>
  @H2A4lOtherText%</H2A4lOtherText>
  @H2A4lTraining%</H2A4lTraining>
  @H2A4Comments%</H2A4Comments>
  @H2B2aBoard%</H2B2aBoard>
  @H2B2bAgency%</H2B2bAgency>
  @H2B3aHoursDonated%</H2B3aHoursDonated>
  @H2B3bHoursL%</H2B3bHoursL>
  @H2B4aROWTrainers%</H2B4aROWTrainers>
  @H2B4bROWImplementers%</H2B4bROWImplementers>
  @H2B4cCCAP%</H2B4cCCAP>
  @H2B4dChild%</H2B4dChild>
  @H2B4eFamily%</H2B4eFamily>
  @H2B4fPathways%</H2B4fPathways>
  @H2B4gHome%</H2B4gHome>
  @H2B4gAuditors%</H2B4gAuditors>
  @H2B4gBetroff%</H2B4gBetroff>
  @H2B4gCrew%</H2B4gCrew>
  @H2B4gQCI%</H2B4gQCI>
  @H2B4hLEO%</H2B4hLEO>
  @H2B4iBPI%</H2B4iBPI>
  @H2B4jCLASS%</H2B4jCLASS>
  @H2B4kQCS%</H2B4kQCS>
  @H2B4lATCP%</H2B4lATCP>
  @H2B4mOther%</H2B4mOther>
  @H2B4Specify%</H2B4Specify>
  @H2B5aNonProfit%</H2B5aNonProfit>
  @H2B5bFaith%</H2B5bFaith>
  @H2B5cLocal%</H2B5cLocal>
  @H2B5dState%</H2B5dState>
  @H2B5eFederal%</H2B5eFederal>
  @H2B5fForProfit%</H2B5fForProfit>
  @H2B5gConsortiums%</H2B5gConsortiums>
  @H2B5hSchools%</H2B5hSchools>
  @H2B5iPostSecondary%</H2B5iPostSecondary>
  @H2B5jBanks%</H2B5jBanks>
  @H2B5kHealth%</H2B5kHealth>
  @H2B5lStatewide%</H2B5lStatewide>
  @H2B5mComments%</H2B5mComments>
  @H2C2aAllottee%</H2C2aAllottee>
  @H2C3aDOB%</H2C3aDOB>
  @H2C3bLEAPAssist%</H2C3bLEAPAssist>
  @H2C3bLEAPProv%</H2C3bLEAPProv>
  @H2C3bHeadStart%</H2C3bHeadStart>
  @H2C3bEarlyHeadStart%</H2C3bEarlyHeadStart>
  @H2C3b501devAmicans%</H2C3b501devAmicans>
  @H2C3b580%</H2C3b580>
  @H2C3bMedicareMedicaid%</H2C3bMedicareMedicaid>
  @H2C3bAFI%</H2C3bAFI>
  @H2C3bTAF%</H2C3bTAF>
  @H2C3b10CCDBG%</H2C3b10CCDBG>
  @H2C3b11CED%</H2C3b11CED>
  @H2C3b12OtherHome%</H2C3b12OtherHome>
  @H2C3b12OtherWSCDA%</H2C3b12OtherWSCDA>
  @H2C3b12OtherHousing%</H2C3b12OtherHousing>
  @H2C3b12OtherHSName%</H2C3b12OtherHSName>

```

# Common Issues: XML Name

## ■ Module 2

```
<CSBG_M2 xmlns:xsi = "http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CSBG_M2.xsd">
```

```
<CSBG_M2 xmlns:xsi = "http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CSBG_M2.xsd">
```

## ■ Module 4

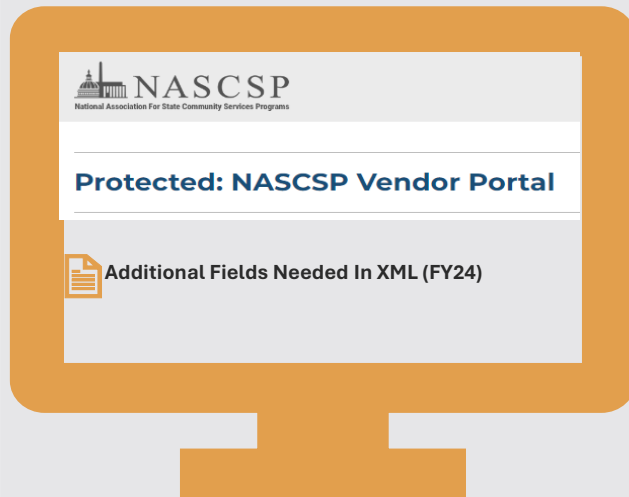
```
<CSBG_M4 xmlns:xsi = "http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CSBG_M4.xsd">
```

```
<CSBG_M4 xmlns:xsi = "http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CSBG_M4.xsd">
```

# Common Issues: Eligible Entity

- Specific to agency
- Must match CSBG Eligible Entity List within OLDC

```
<GRANTEENAME>HAWAII DEPARTMENT OF LABOR & IND</GRANTEENAME>  
<ELIGIBLEENTITY>Honolulu Community Action Program, Inc.</ELIGIBLEENTITY>  
<orgAbbrev>ACF</orgAbbrev>  
<programAcronym>CSBG</programAcronym>  
<UEI>J8VUHE2CC5C3</UEI>  
<reportPeriodStartDate>2023-10-01</reportPeriodStartDate>  
<reportPeriodEndDate>2024-09-30</reportPeriodEndDate>  
<grantNumber>2301HICOSR</grantNumber>  
<subGrantee>1</subGrantee>
```



# Common Issues: UEI

- Replaced DUNS No. in FY23
- Specific to agency
- Must match CSBG Eligible Entity List within OLDC

```
<GRANTEENAME>HAWAII DEPARTMENT OF LABOR & IND</GRANTEENAME>  
<ELIGIBLEENTITY>Honolulu Community Action Program, Inc.</ELIGIBLEENTITY>  
<orgAbbrev>ACF</orgAbbrev>  
<programAcronym>CSBG</programAcronym>  
<UEI>J8VUHE2CC5C3</UEI>  
<reportPeriodStartDate>2023-10-01</reportPeriodStartDate>  
<reportPeriodEndDate>2024-09-30</reportPeriodEndDate>  
<grantNumber>2301HICOSR</grantNumber>  
<subGrantee>1</subGrantee>
```



# Important note about UEIs

- If an agency recertified, and their UEI updated, please wait to update within the CSBG Eligible Entity List (CEEL).
- The system was prepared based on the UEIs that were in the CEEL in September 2024.

# Common Issues: Reporting Period

- reportPeriod**Start**Date – start date of the federal fiscal year
- reportPeriod**End**Date – end date of the federal fiscal year
  - **Format:** YYYY-MM-DD
  - **FY24 Start:** 2023-10-01
  - **FY24 End:** 2024-09-30

```
<GRANTEENAME>HAWAII DEPARTMENT OF LABOR & IND</GRANTEENAME>
<ELIGIBLEENTITY>Honolulu Community Action Program, Inc.</ELIGIBLEENTITY>
<orgAbbrev>ACF</orgAbbrev>
<programAcronym>CSBG</programAcronym>
<UEI>J8VUHE2CC5C3</UEI>
<reportPeriodStartDate>2023-10-01</reportPeriodStartDate>
<reportPeriodEndDate>2024-09-30</reportPeriodEndDate>
<grantNumber>2301HICOSK</grantNumber>
<subGrantee>1</subGrantee>
```

# Common Issues: Data Fields

- For OLDC to appropriately read the XML:
  - Each fieldname is specific
  - Each field is in a specific order

```
<CSBG_HQ xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CSBG_HQ.xsd">
  <GRANTEEName></GRANTEEName>
  <ELIGIBILITY></ELIGIBILITY>
  <orgabbr></orgabbr>
  <programAcronym>CSBG</programAcronym>
  <UE1></UE1>
  <reportPeriodStartDate>2022-10-01</reportPeriodStartDate>
  <reportPeriodEndDate>2023-09-30</reportPeriodEndDate>
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  <H2A3Admin></H2A3Admin>
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  <H2A4aDataManagement></H2A4aDataManagement>
  <H2A4bOther></H2A4bOther>
  <H2A4cStrategicPlanning></H2A4cStrategicPlanning>
  <H2A4dOtherText></H2A4dOtherText>
  <H2A4eTraining></H2A4eTraining>
  <H2A4fComments></H2A4fComments>
  <H2B2aBoard></H2B2aBoard>
  <H2B2bAgency></H2B2bAgency>
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  <H2B3bHoursLI></H2B3bHoursLI>
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  <H2B4iRetirees></H2B4iRetirees>
  <H2B4jCrew></H2B4jCrew>
  <H2B4kQC1></H2B4kQC1>
  <H2B4lEED></H2B4lEED>
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  <H2B4nClass></H2B4nClass>
  <H2B4oHQ></H2B4oHQ>
  <H2B4pAICP></H2B4pAICP>
  <H2B4qOther></H2B4qOther>
  <H2B4rSpecify></H2B4rSpecify>
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  <H2B5bFaith></H2B5bFaith>
  <H2B5cLocal></H2B5cLocal>
  <H2B5dState></H2B5dState>
  <H2B5eFederal></H2B5eFederal>
  <H2B5fForProfit></H2B5fForProfit>
  <H2B5gConsortiums></H2B5gConsortiums>
  <H2B5hSchools></H2B5hSchools>
  <H2B5iPostSecondary></H2B5iPostSecondary>
  <H2B5jBanks></H2B5jBanks>
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  <H2C3b65SBO></H2C3b65SBO>
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  <H2C3b8ATJ></H2C3b8ATJ>
  <H2C3b9TANF></H2C3b9TANF>
  <H2C3b10CCDBG></H2C3b10CCDBG>
  <H2C3b11CED></H2C3b11CED>
  <H2C3b12OtherHHSName></H2C3b12OtherHHSName>
  <H2C3b12OtherHHSFCA></H2C3b12OtherHHSFCA>
  <H2C3b12OtherHHSDollar></H2C3b12OtherHHSDollar>
  <H2C3b121OtherHHSName></H2C3b121OtherHHSName>
  </CSBG_HQ>
```





# Common Issues: Special Characters

- Five special characters must convert to be read properly:
  - Ampersand and the semi-colon is part of the code

Character	XML Code
Less than sign (<)	&lt;
More than sign (>)	&gt;
Quotations ("" )	&quot;
Ampersand (&)	&amp;
Apostrophe (')	&apos;

## FOR MORE INFORMATION:



<https://xml.silmaril.ie/specials.html>

# CSBG ANNUAL REPORT REVISIONS

# Important Note about Revisions

- The CSBG Annual Report receives clearance from the Office of Management and Budget (OMB).
  - Approved version for FY24: CSBG Annual Report 2.1
- States with databases should be prepared to revise both the front-facing and the backend (i.e., the XML) to align with the OMB approved form.
- No revisions from FY23 to FY24.

# Fiscal Year 2024 (FY24) CSBG Annual Report

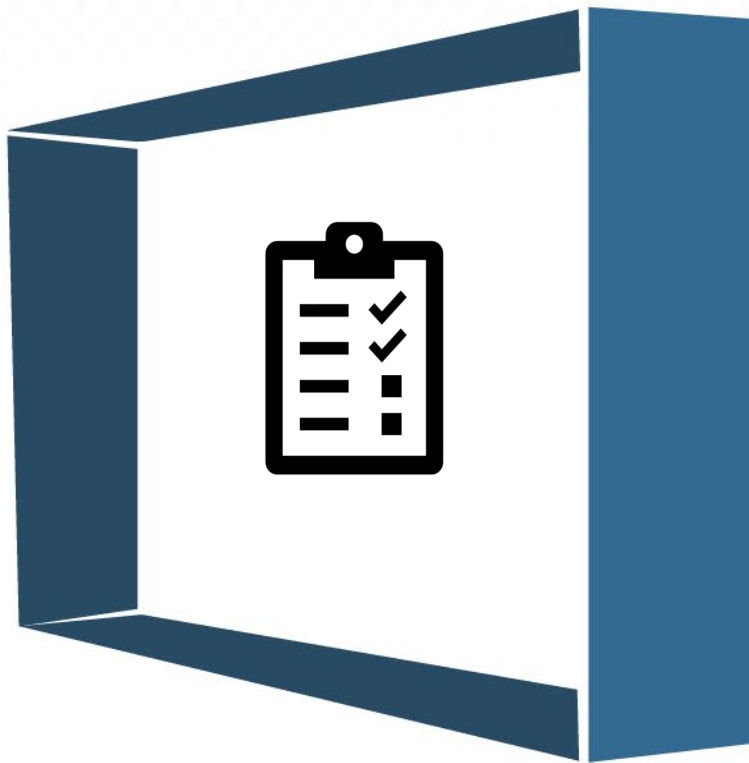
**Due Date: March 31, 2025**

- 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.



[ACF-OCS-CSBG-AT-25-01 Annual Report Submission FY24](#)

# VALIDATIONS



# Validations Overview

## Available via the Vendor Portal

- Verifies that the data was entered correctly
  - Targeting and Year-to-Year
  - Auto-Calculations
  - Age verifications and other alignments
  - Subsets

# Targeting and Year-to-Year

- **Targeting (Module 4, Section A):**

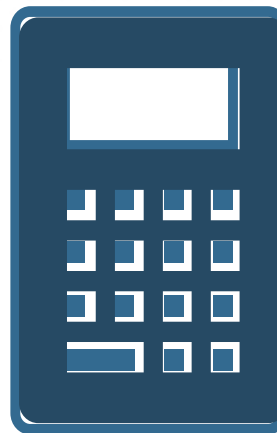
- No longer verifying 80% - 120% as errors or warnings
- No longer verifying 100% achievement results

- **Year-to-Year**

- Validations were updated in FY19
- Validations were tweaked in FY24
- Review validations form in **Vendor Portal**

# Auto-Calculations

- The SmartForms has fields that are auto-calculated for accuracy.
- **Recommendation:** Build auto-calculations into the state database.





# Auto-Calculations – Module 2

- Data Points
  - A.2k
  - C.3b.13
  - C.3m
  - C.3n
  - C.4o
  - C.4p
  - C.5e
  - C.6g
  - C.7
  - C.8
- Auto-calculates the prior fields
- For specific formulas, see the **Data Dictionary** in the **Vendor Portal**

# Auto-Calculations – Module 2

- C.3b.13, C3.n., and c.4o.
  - Auto-calculated field of i.-iv. above

C.3b.12.	Other HHS Resource Description	CFDA #:		
C.3b.12.i.	<input type="text"/>	CFDA #:	<input type="text"/>	C.3b.12.i. <input type="text"/>
C.3b.12.ii.	<input type="text"/>	CFDA #:	<input type="text"/>	C.3b.12.ii. <input type="text"/>
C.3b.12.iii.	<input type="text"/>	CFDA #:	<input type="text"/>	C.3b.12.iii. <input type="text"/>
C.3b.12.iv.	<input type="text"/>	CFDA #:	<input type="text"/>	C.3b.12.iv. <input type="text"/>
C.3b.13. Total Other HHS Resources (autocalculated)				C.3b.13. \$ <input type="text" value="-"/>

# Auto-Calculations – Module 4, Section A

- Section A, Column IV, *Percentage Achieving Outcome*

- Formula: **Column III, Actual Results** divided by **Column I, Number of Individuals Served**

I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy [III/II = V] (% auto calculated)

- Section A, Column V, *Performance Target Accuracy*

- Formula: **Column III, Actual Results** divided by **Column II, Target**

I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy [III/II = V] (% auto calculated)

# Auto-Calculations – Module 4, Section C, Individual Level Characteristics

- Each **Total** field should sum up the preceding fields.
  - Example: **C.1e. Total** should be the total sum of C.1a. + C.1b. + C.1c. + C.1d.

## Validation

- The **Totals** for **Individual Characteristics** should equal the Unduplicated number of all **Individuals**, except:
  - C.3i. Education Levels Totals
  - C.4a. Disconnected Youth
  - C.5c.9 Health Insurance Sources Total
  - C.7e. Military Status Total
  - C.8i. Work Status Total

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:  
B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:


### C. INDIVIDUAL LEVEL CHARACTERISTICS

1. Gender	Number of Individuals
a. Male	
b. Female	
c. Other	
d. Unknown/not reported	
e. TOTAL (auto calculated)	

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	

3. Education Levels	Number of Individuals	
	(ages 14-24)	(ages 25+)
a. Grades 0-8		
b. Grades 9-12/Non-Graduate		
c. High School Graduate		
d. GED/Equivalency Diploma		
e. 12 grade + Some Post-Secondary		
f. 2 or 4 years College Graduate		
g. Graduate of other post-secondary school		
h. Unknown/not reported		
i. TOTAL (auto calculated)	0	0

4. Disconnected Youth	Number of Individuals
a. Youth ages 14-24 who are neither working or in school	

6. Ethnicity/Race	Number of Individuals
a. Ethnicity	
a.1. Hispanic, Latino or Spanish Origins	
a.2. Not Hispanic, Latino or Spanish Origins	
a.3. Unknown/not reported	
a.4. TOTAL (auto calculated)	

b. Race	
b.1. American Indian or Alaska Native	
b.2. Asian	
b.3. Black or African American	
b.4. Native Hawaiian and Other Pacific Islander	
b.5. White	
b.6. Other	
b.7. Multi-race (two or more of the above)	
b.8. Unknown/not reported	
b.9. TOTAL (auto calculated)	

7. Military Status	Number of Individuals
a. Veteran	
b. Active Military	
c. Never Served in the Military	
d. Unknown/not reported	
e. TOTAL (auto calculated)	

8. Work Status (Individuals 18+)	Number of Individuals
a. Employed Full-Time	
b. Employed Part-Time	
c. Migrant or Seasonal Farm Worker	
d. Unemployed (Short-Term, 6 months or less)	
e. Unemployed (Long-Term, more than 6 months)	
f. Unemployed (Not in Labor Force)	
g. Retired	
h. Unknown/not reported	
i. TOTAL (auto calculated)	

# Auto-Calculations – Module 4, Section C, Household Level Characteristics

- Each **Total** field should sum up the preceding fields.
  - Example: **D.9j. Total** should be the total sum of D.9a. + D.9b. + D.9c. + D.9d. + D.9e. + D.9f. + D.9g. + D.9h. + D.9i.

## Validation

- The **Totals** for **Household Level Characteristics** should equal the Unduplicated number of all **Households**, except:
  - D.14. Other Income Source
  - D.15. Non-Cash Benefits

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:  
B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:

### D. HOUSEHOLD LEVEL CHARACTERISTICS

9. Household Type	Number of Households
a. Single Person	
b. Two Adults NO Children	
c. Single Parent Female	
d. Single Parent Male	
e. Two Parent Household	
f. Non-related Adults with Children	
g. Multigenerational Household	
h. Other	
i. Unknown/not reported	
j. TOTAL (auto calculated)	

10. Household Size	Number of Households
a. Single Person	
b. Two	
c. Three	
d. Four	
e. Five	
f. Six or more	
g. Unknown/not reported	
h. TOTAL (auto calculated)	

11. Housing	Number of Households
a. Own	
b. Rent	
c. Other permanent housing	
d. Homeless	
e. Other	
f. Unknown/not reported	
g. TOTAL (auto calculated)	

12. Level of Household Income (% of HHS Guideline)	Number of Households
a. Up to 50%	
b. 51% to 75%	
c. 76% to 100%	
d. 101% to 125%	
e. 126% to 150%	
f. 151% to 175%	
g. 176% to 200%	
h. 201% to 250%	
i. 251% and over	
j. Unknown/not reported	
k. TOTAL (auto calculated)	

13. Sources of Household Income	Number of Households
a. Income from Employment Only	
b. Income from Employment and Other Income Source	
c. Income from Employment, Other Income Source, and Non-Cash Benefits	
d. Income from Employment and Non-Cash Benefits	
e. Other Income Source Only	
f. Other Income Source and Non-Cash Benefits	
g. No Income	
h. Non-Cash Benefits Only	
i. Unknown/not reported	
j. TOTAL (auto calculated)	

Below, please report the types of Other Income and/or non-cash benefits received by the households who reported sources other than employment

14. Other Income Source	Number of Households
a. TANF	
b. Supplemental Security Income (SSI)	
c. Social Security Disability Income (SSDI)	
d. VA Service-Connected Disability Compensation	
e. VA Non-Service Connected Disability Pension	
f. Private Disability Insurance	
g. Worker's Compensation	
h. Retirement Income from Social Security	
i. Pension	
j. Child Support	
k. Alimony or other Spousal Support	
l. Unemployment Insurance	
m. EITC	
n. Other	
o. Unknown/not reported	

15. Non-Cash Benefits	Number of Households
a. SNAP	
b. WIC	
c. LIHEAP	
d. Housing Choice Voucher	
e. Public Housing	
f. Permanent Supportive Housing	
g. HUD-VASH	
h. Childcare Voucher	
i. Affordable Care Act Subsidy	
j. Other	
k. Unknown/not reported	

# Auto-Calculations – Unknown Not Reported and Totals

- The **Totals** for **Individual Characteristics** should equal the Unduplicated number of all **Individuals**.
- The **Totals** for **Household Level Characteristics** should equal the Unduplicated number of all **Households**.
- Agencies may not collect characteristics for all **Individuals** and **Households** that received services – report under **Unknown Not Reported**.
  - Not necessarily a collected data point

- Validation:
  - **Individuals** or **Households** (*respectively*) **minus Total** equals **Unknown Not Reported**.
  - **Total minus Preceding Fields** equals **Unknown Not Reported**.
  - **Result: Total** will equal **Individuals** or **Households**, respectively.

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:  
B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0



# Age Verifications and Other Alignments – M4.C.C.2. Age and M4.C.C.3. Education Levels

## ■ M4.C.C.2. Age

- Provide the ages of all Individuals who received services.
- Add Individuals that did not provide their age under Unknown Not Reported.

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0

## ■ M4.C.C.3. Education Levels

- Total Ages 14-24 = M4.C.C.2c + M4.C.C.2d
- Total Ages 25+ = the sum of M4.C.C.2e.:M4.C.C.2j.
- **Unknown Not Reported** should be the difference between the **Total** and **Preceding Fields**.

3. Education Levels	Number of Individuals	
	[ages 14-24]	[ages 25+]
a. Grades 0-8		
b. Grades 9-12/Non-Graduate		
c. High School Graduate		
d. GED/Equivalency Diploma		
e. 12 grade + Some Post-Secondary		
f. 2 or 4 years College Graduate		
g. Graduate of other post-secondary school		
h. Unknown/not reported		
i. TOTAL (auto calculated)	0	0

# Age Verifications and Other Alignments – M4.C.C.2. Age and M4.C.C.4a. Disconnected Youth

## ■ M4.C.C.2. Age

- Provide the ages of all Individuals who received services.
- Add Individuals that did not provide their age under **Unknown Not Reported**.

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0

## ■ M4.C.C.4a. Disconnected Youth

- Specifically looking at **ages 14 – 24**
- **M4.C.C.4a. *must not exceed* M4.C.C.2c + M4.C.C.2d**

4. Disconnected Youth	Number of Individuals
a. Youth ages 14-24 who are neither working or in school	



# Age Verifications and Other Alignments – M4.C.C.2. Age and M4.C.C.7. Military Status

## ■ M4.C.C.2. Age

- Provide the ages of all Individuals who received services.
- Add Individuals that did not provide their age under **Unknown Not Reported**.

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0

## ■ M4.C.C.7. Military Status

- Specifically looking at **ages 18+**
- **M4.C.C.7e. Total** = the sum of **M4.C.C.2d.:M4.C.C.2j.**
- **Unknown Not Reported** should be the difference between the **Total** and **Preceding Fields**.

7. Military Status	Number of Individuals
a. Veteran	
b. Active Military	
c. Never Served in the Military	
d. Unknown/not reported	
e. TOTAL (auto calculated)	0

# Age Verifications and Other Alignments – M4.C.C.2. Age and M4.C.C.8. Work Status

## ■ M4.C.C.2. Age

- Provide the ages of all Individuals who received services.
- Add Individuals that did not provide their age under **Unknown Not Reported**.

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0

## ■ M4.C.C.8. Work Status

- Specifically looking at **ages 18+**
- **M4.C.C.8i. Total** = the sum of **M4.C.C.2d.:M4.C.C.2j.**
- **Unknown Not Reported** should be the difference between the **Total** and **Preceding Fields**.

8. Work Status (Individuals 18+)	Number of Individuals
a. Employed Full-Time	
b. Employed Part-Time	
c. Migrant or Seasonal Farm Worker	
d. Unemployed (Short-Term, 6 months or less)	
e. Unemployed (Long-Term, more than 6 months)	
f. Unemployed (Not in Labor Force)	
g. Retired	
h. Unknown/not reported	
i. TOTAL (auto calculated)	0

# Age Verifications and Other Alignments – M4.C.C.5b. Health Insurance and M4.C.C.5c. Health Insurance Sources

## ■ M4.C.C.5b. Health Insurance

- **Yes:** Of the **Individuals** served, how many reported having Health Insurance?
- **No:** Of the **Individuals** served, how many reported **not** having Health Insurance?
- **Unknown:** Of the **Individuals** served, how many did not report **whether** they Health Insurance?

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:  
B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:


5. Health	Number of Individuals		
	Yes	No	Unknown
a. Disabling Condition			
b. Health Insurance*			

\*If an individual reported that they had Health Insurance please identify the source of health insurance below.

## ■ M4.C.C.5c. Health Insurance Sources

- Of the **Individuals** that reported that they do have Health Insurance (Yes), what Health Insurance did they report having?
- **M4.C.C.5c. Total = M4.C.C.5b. Yes**
- **Unknown Not Reported** should be the difference between the **Total** and **Preceding Fields**.

### Health Insurance Sources

- c.1. Medicaid
- c.2. Medicare
- c.3. State Children's Health Insurance Program
- c.4. State Health Insurance for Adults
- c.5. Military Health Care
- c.6. Direct-Purchase
- c.7. Employment Based
- c.8. Unknown/not reported
- c.9. TOTAL (auto calculated)

0

# Age Verifications and Other Alignments – M4.C.D.13. Sources of Household Income and M4.C.D.14. Other Income Source

## ■ M4.C.D.13. Sources of Household Income

- What sources of income did **Households** report?
  - Each **Household** should only be reported once.
- **Unknown:** Of the **Individuals** served, how many did not report **whether** they Health Insurance?

13. Sources of Household Income	Number of Households
a. Income from Employment Only	
b. Income from Employment and Other Income Source	
c. Income from Employment, Other Income Source, and Non-Cash Benefits	
d. Income from Employment and Non-Cash Benefits	
e. Other Income Source Only	
f. Other Income Source and Non-Cash Benefits	
g. No Income	
h. Non-Cash Benefits Only	
i. Unknown/not reported	
j. TOTAL (auto calculated)	0



## ■ M4.C.D.14. Other Income Source

- Of the **Households** that reported that they do have an **Other Income Source**, what Other Income Source did they report?
- No individual **Other Income Source** should **exceed** sum of **D.13b. + D.13c. + D.13e. + D.13f.**
- **Unknown Not Reported**
  - Must not **exceed** sum of **D.13b. + D.13c. + D.13e. + D.13f.**
  - Individuals that did not report their **Other Income Source**
  - May be zero if not tracking

14. Other Income Source	Number of Households
a. TANF	
b. Supplemental Security Income (SSI)	
c. Social Security Disability Income (SSDI)	
d. VA Service-Connected Disability Compensation	
e. VA Non-Service Connected Disability Pension	
f. Private Disability Insurance	
g. Worker's Compensation	
h. Retirement Income from Social Security	
i. Pension	
j. Child Support	
k. Alimony or other Spousal Support	
l. Unemployment Insurance	
m. EITC	
n. Other	
o. Unknown/not reported	

# Age Verifications and Other Alignments – M4.C.D.13. Sources of Household Income and M4.C.D.15. Non-Cash Benefits

## ■ M4.C.D.13. Sources of Household Income

- What sources of income did **Households** report?
  - Each **Household** should only be reported once.
- **Unknown:** Of the **Individuals** served, how many did not report **whether** they Health Insurance?

13. Sources of Household Income	Number of Households
a. Income from Employment Only	
b. Income from Employment and Other Income Source	
c. Income from Employment, Other Income Source, and <b>Non-Cash Benefits</b>	
d. Income from Employment and <b>Non-Cash Benefits</b>	
e. Other Income Source Only	
f. Other Income Source and <b>Non-Cash Benefits</b>	
g. No Income	
h. <b>Non-Cash Benefits Only</b>	
i. Unknown/not reported	
j. TOTAL (auto calculated)	0



## ■ M4.C.D.15. Non-Cash Benefits

- Of the **Households** that reported that they do have **Non-Cash Benefits**, what Other Income Source did they report?
- No individual **Non-Cash Benefits** should **exceed** sum of **D.13c. + D.13d. + D.13f. + D.13h.**
- **Unknown Not Reported**
  - Must not **exceed** sum of **D.13c. + D.13d. + D.13f. + D.13h.**
  - Individuals that did not report their **Non-Cash Benefits**
  - May be zero if not tracking

15. Non-Cash Benefits	Number of Households
a. SNAP	
b. WIC	
c. LIHEAP	
d. Housing Choice Voucher	
e. Public Housing	
f. Permanent Supportive Housing	
g. HUD-VASH	
h. Childcare Voucher	
i. Affordable Care Act Subsidy	
j. Other	
k. Unknown/not reported	

# Subsets

## Auto-Calculated

- The sub-data must **equal** the parent data.
  - FNPI 2c
  - FNPI 2d
  - FNPI 5i

## Not Auto-Calculated

- The sub-data must **not exceed** the parent data.
  - FNPI 1h
  - FNPI 6a

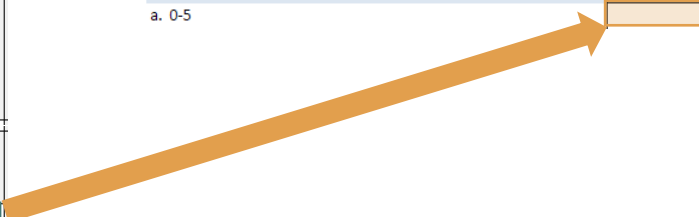
# Subsets – M4, Section A, FNPI 2c

- **Parent row** is read-only.
- **Age Verification**
  - **2c.1** should not **exceed** Module 4, Section C, C.2a., **Ages 0 – 5**.
- **Formula: 2c = 2c.1 + 2c.2 + 2c.3**
  - Applicable to Columns I - III

Education and Cognitive Development (FNPI 2)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 2c The number of <b>children</b> and <b>youth</b> who demonstrated improved positive approaches toward learning, including improved attention skills. (auto total).	0	0	0
FNPI 2c.1 Early Childhood Education (ages 0-5)			
FNPI 2c.2 1st grade-8th grade			
FNPI 2c.3 9th grade-12th grade			

2. Age  
a. 0-5

Number of Individuals



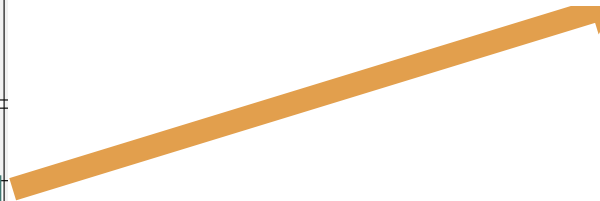
# Subsets – M4, Section A, FNPI 2d

- **Parent row** is read-only.
- **Age Verification**
  - **2d.1** should not **exceed** Module 4, Section C, C.2a., **Ages 0 – 5**.
- **Formula: 2d = 2d.1 + 2d.2 + 2d.3**
  - Applicable to Columns I - III

Education and Cognitive Development (FNPI 2)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 2d The number of <b>children</b> and <b>youth</b> who are achieving at basic grade level (academic, social, and other school success skills). (auto total)	0	0	0
FNPI 2d.1 Early Childhood Education (ages 0-5)			
FNPI 2d.2 1st grade-8th grade			
FNPI 2d.3 9th grade-12th grade			

2. Age  
a. 0-5

Number of Individuals





# Subsets – M4, Section A, FNPI 5i

- **Parent row** is read-only.
- **Age Verification**
  - **5i.1** should not **exceed** Module 4, Section C, C.2a., **Ages 14 – 17**.
  - **5i.2** should not **exceed** Module 4, Section C, C.2a., **Ages 18+**.
- **Formula: 5i = 5i.1 + 5i.2**
  - Applicable to Columns I - III

Health and Social/Behavioral Development (FNPI 5)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 5i The number of individuals with <b>no recidivating event</b> for six months.	0	0	0
FNPI 5i.1 Youth (ages 14-17)			
FNPI 5i.2 Adults (ages 18+)			

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
l. TOTAL (auto calculated)	0

# Subsets: M4, Section A, FNPI 1h

- **Parent Row** is editable.
- **Validation: 1h.1, 1h.2, 1h.3** must not **exceed 1h.**
  - However, this is **not** a summation, i.e.,  $1h.1 + 1h.2 + 1h.3 \neq 1h.$
- Applicable to Columns I – III

Employment (FNPI 1)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 1h The number of employed participants in a career-advancement related program who <b>entered or transitioned</b> into a position that provided increased income and/or benefits.			
FNPI 1h.1 Of the above, the number of employed participants who Increased income from employment through <b>wage or salary amount increase</b> .			
FNPI 1h.2 Of the above, the number of employed participants who increased income from employment through <b>hours worked increase</b> .			
FNPI 1h.3 Of the above, the number of employed participants who <b>increased benefits</b> related to employment.			



# Subsets: M4, Section A, FNPI 6a

- **Parent Row** is editable.
- **Validation: 6a.1, 6a.2, 6a.3** must not **exceed 6a**.
  - However, this is **not** a summation, i.e.,  $6a.1 + 6a.2 + 6a.3 \neq 6a$ .
- Applicable to Columns I – III

Civic Engagement and Community Involvement Indicators (FNPI 6)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 6a The number of individuals who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.	752	500	600
FNPI 6a.1 Of the above, the number of Community Action program participants who <b>improved their leadership skills</b> .	650	300	450
FNPI 6a.2 Of the above, the number of Community Action program participants who <b>improved their social networks</b> .	250	300	150
FNPI 6a.3 Of the above, the number of Community Action program participants who gained other skills, knowledge and abilities to <b>enhance their ability to engage</b> .	720	250	650

# Missing Data – All Required

- Module 2, C.3b.12. and C.3l.

C.3b.12. Other HHS Resource Description	
C.3b.12.i.	
C.3b.12.ii.	
C.3b.12.iii.	
C.3b.12.iv.	

CFDA #:		C.3b.12.i.	
CFDA #:		C.3b.12.ii.	
CFDA #:		C.3b.12.iii.	
CFDA #:		C.3b.12.iv.	

- Module 2, C.4n.

C.4n. Other State Resources	
C.4n.i.	
C.4n.ii.	
C.4n.iii.	
C.4n.iv.	

C.4n.i.	
C.4n.ii.	
C.4n.iii.	
C.4n.iv.	

# Missing Data – At Least Parent and 1 Child Required

- All Parent/Child Datapoints
  - Auto-calculated
    - Example Module 4, FNPI 2c and FNPI 2c.1 – 2c.3

FNPI 2c The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills. (auto total).	0	0	0
FNPI 2c.1 Early Childhood Education (ages 0-5)			
FNPI 2c.2 1st grade-8th grade			
FNPI 2c.3 9th grade-12th grade			

- Cannot Exceed
  - Example - Module 2, B.4g. and B.4g.1. – B.4g.4

B.4g. Number of Staff with Home Energy Professional Certifications	
B.4g.1. Number of Energy Auditors	
B.4g.2. Number of Retrofit Installer Technicians	
B.4g.3. Number of Crew Leaders	
B.4g.4. Number of Quality Control Inspectors (QCI)	

# Missing Data – If Then Requirements

- If Module 2, A.4. Other Selected, **Then** Text Description Required.

**A.4. Details on Agency Capacity Building Activities Funded by CSBG:**

1. Please identify which activities were funded by CSBG under Agency Capacity in Table A.2. Please check all that apply.

☐ Community Needs Assessment    ☐ Data Management & Reporting    ☐ Other\*  
☐ Strategic Planning    ☐ Training & Technical Assistance

*\*Below please specify Other Activities funded by CSBG under Agency Capacity:*

- If Module 2, B.4m. > 0, **Then** Text Description Required.

**B.4m. Other (Please specify others below):**

- If Module 4, FNPI Z Used, **Then** Text Description Required.

Other Employment Outcome Indicator (FNPI 1z)	I.) Number of Individuals Served in program(s) (#)
FNPI 1z.1 The number of individuals _____	



## Answer in the chat...

- What is wrong with this data?
  - A. Nothing.
  - B. The summation of Individuals Served for 6a.1 + 6a.2 + 6a.3 exceeds 6a.
  - C. For 6a.2, the Target exceeds the Individuals Served.
  - D. For 6a.3, the Individuals Served and the Actual Results exceeds 6a.

Civic Engagement and Community Involvement Indicators (FNPI 6)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 6a The number of individuals who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.	752	500	600
FNPI 6a.1 Of the above, the number of Community Action program participants who <b>improved their leadership skills</b> .	650	300	450
FNPI 6a.2 Of the above, the number of Community Action program participants who <b>improved their social networks</b> .	250	300	150
FNPI 6a.3 Of the above, the number of Community Action program participants who <b>gained other skills, knowledge and abilities to enhance their ability to engage</b> .	800	250	650

# Answer in the chat...



- **What is wrong with this data?**
  - A. Nothing.
  - B. The summation of Individuals Served for 6a.1 + 6a.2 + 6a.3 exceeds 6a.
  - C. For 6a.2, the Target exceeds the Individuals Served.
  - D. **For 6a.3, the Individuals Served and the Actual Results exceeds 6a.**
    - No singular data point can exceed the parent row.

Civic Engagement and Community Involvement Indicators (FNPI 6)	I.) Number of Individuals Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)
FNPI 6a The number of individuals who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.	752	500	600
FNPI 6a.1 Of the above, the number of Community Action program participants who improved their leadership skills.	650	300	450
FNPI 6a.2 Of the above, the number of Community Action program participants who improved their social networks.	250	300	150
FNPI 6a.3 Of the above, the number of Community Action program participants who gained other skills, knowledge and abilities to enhance their ability to engage.	800	250	650



# Final Notes

- Recommendations
  - Build what you can but do a manual check for others.
- Resources can be found in the **Vendor Portal**.

# VENDOR PORTAL



# Vendor Portal Overview

<https://nascsp.org/nascsp-vendor-portal/>

**Password:** NASCSPVendor111K

- Includes:
  - Data Dictionary
  - Copy of XML, XSD, and SmartForms
  - Additional Fields, i.e., Header Rows
  - Data Validations

# Data Dictionary

Defines the data elements of the CSBG Annual Report (i.e., what is an acceptable value for that data field, how to calculate a data field if it is an auto-calculated field, what are limitations)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Name	Data Element	Data Type	List	Null	Validation Requirements	Definition	Notes	Module	Worksheet	Smartform Range Name	Type	XML Export Name	Worksheet Data Validation (NVDV) Type
1								leading 0's						
4	M2A2aEmployment	Mod 2 Sec A Item 2a	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Employment		M2	Section A: Local CSBG Expen	M2A2aEmployment	Number	M2A2aEmployment	Numeric values You n \$99.9
5	M2A2bEducation	Mod 2 Sec A Item 2b	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Education and Cognitive Development		M2	Section A: Local CSBG Expen	M2A2bEducation	Number	M2A2bEducation	Numeric values You n \$99.9
6	M2A2cIncome	Mod 2 Sec A Item 2c	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Income, Infrastructure, and Asset Building		M2	Section A: Local CSBG Expen	M2A2cIncome	Number	M2A2cIncome	Numeric values You n \$99.9
7	M2A2dHousing	Mod 2 Sec A Item 2d	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Housing		M2	Section A: Local CSBG Expen	M2A2dHousing	Number	M2A2dHousing	Numeric values You n \$99.9
8	M2A2eHealth	Mod 2 Sec A Item 2e	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Health and Social/Behavioral Development (includes nutrition)		M2	Section A: Local CSBG Expen	M2A2eHealth	Number	M2A2eHealth	
9	M2A2fCivic	Mod 2 Sec A Item 2f	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Civic Engagement and Community Involvement		M2	Section A: Local CSBG Expen	M2A2fCivic	Number	M2A2fCivic	
10	M2A2gServices	Mod 2 Sec A Item 2g	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Services Supporting Multiple Domains		M2	Section A: Local CSBG Expen	M2A2gServices	Number	M2A2gServices	Numeric values You n \$99.9
11	M2A2hLinkages	Mod 2 Sec A Item 2h	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Linkages (e.g. partnerships that support multiple domains)		M2	Section A: Local CSBG Expen	M2A2hLinkages	Number	M2A2hLinkages	
12	M2A2iCapacity	Mod 2 Sec A Item 2i	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Agency Capacity Building		M2	Section A: Local CSBG Expen	M2A2iCapacity	Number	M2A2iCapacity	
13	M2A2jOther	Mod 2 Sec A Item 2j	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99	CSBG Expenditures Domains - Other (e.g. emergency management/disaster relief)		M2	Section A: Local CSBG Expen	M2A2jOther	Number	M2A2jOther	
14	M2A2kTotal	Mod 2 Sec A Item 2k	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 999,999,999.99. Calculated as: M2A2aEmployment + M2A2bEducation + M2A2cIncome + M2A2dHousing + M2A2eHealth + M2A2fCivic + M2A2gServices + M2A2hLinkages + M2A2iCapacity + M2A2jOther.	CSBG Expenditures Domains - Total CSBG Expenditures (auto-calculated)	Field should be auto-calculated as: M2A2aEmployment + M2A2bEducation + M2A2cIncome + M2A2dHousing + M2A2eHealth + M2A2fCivic + M2A2gServices + M2A2hLinkages + M2A2iCapacity + M2A2jOther.	M2	Section A: Local CSBG Expen	M2A2kTotal	Number	M2A2kTotal	
15	M2A3Admin	Mod 2 Sec A Item 3	Decimal	Not applicable	Not permitted	Minimum value of 0.00. Maximum value of 99,999,999.99. Value must be less than or equal to M2A2kTotal.	Administration Funds - Of the CSBG funds reported above, report the total amount used for Administration.		M2	Section A: Local CSBG Expen	M2A3Admin	Number	M2A3Admin	
16														

# Validations Excel Documents

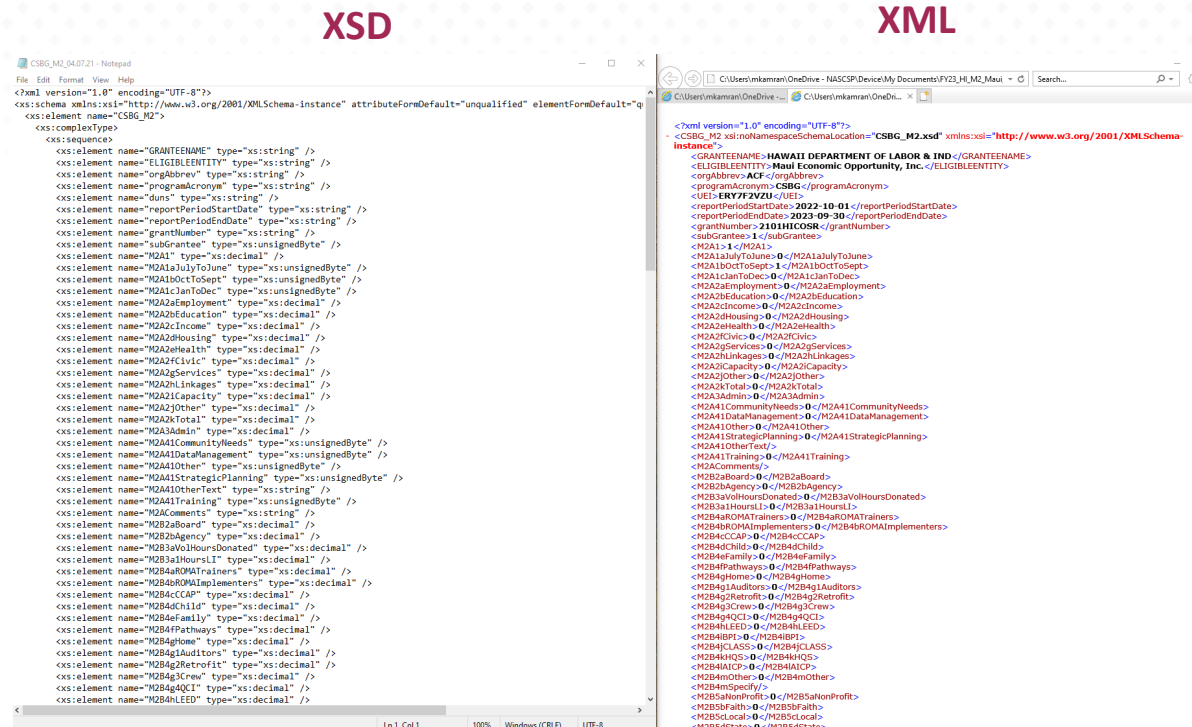
This will list validations that are built in the SmartForms as well as other major validations that are reviewed during the federal quality assurance review (FQAR) process.

Module 2, Section A: CSBG Expenditures by CSBG Eligible Entity - Data Entry Form	ERROR VALIDATION TRIGGER(S)	ERROR MESSAGE DESCRIPTION	ERROR ACTION REQUIRED	WARNING VALIDATION TRIGGER(S)	WARNING MESSAGE DESCRIPTION	WARNING ACTION REQUIRED
A.2k. Total CSBG Expenditures (auto-calculated)	Number not between 0.00 and 99,999,999.99.  A.2k. = Sum of A.2a. - A.2j.	ERROR: Entry outside acceptable rangeflimit.  ERROR: Summation Error	The dollar amount must be between \$0.00 and \$99,999,999.99. Please revise the reported number to be within the accepted range.  A.2k. must equal the sum of A.2a. - A.2j. Please review the values reported under these datapoints to determine which one(s) is incorrect. Make the necessary revision(s) so that Total CSBG Expenditures is equal to the sum of all values reported under CSBG Expenditures Domains.	N/A	N/A	N/A
A.3. Of the CSBG funds reported above, report the total amount used for Administration. <a href="#">For more information on what qualifies as Administration, refer to IM37.</a>	Number not between 0.00 and 99,999,999.99.  A.3. > A.2k.	ERROR: Entry outside acceptable rangeflimit.  ERROR: Dependent datapoint larger than the primary datapoint.	The dollar amount must be between \$0.00 and \$99,999,999.99. Please revise the reported number to be within the accepted range.  A.3. cannot exceed A.2k. Please review these two datapoints to determine which one (or both) needs to be corrected. Make the necessary corrections so that CSBG admin expenditures is not larger than the Total CSBG Expenditures. If A.2k is incorrect, one or more amounts reported under A.2a. - A.2j. may need to be revised to obtain the correct CSBG Expenditures total.	Previous year was 0.00 and current year is > 0.00.  Previous year was > 0.00 and current year is 0.00.  If both previous year and current year are > 0.00, current year is EITHER 100% greater OR 50% less than the previous year.	WARNING: Significant difference between current and previous year.  WARNING: Significant difference between current and previous year.  WARNING: Significant difference between current and previous year.	Current year value is larger than \$0.00, while the previous year's value was \$0.00. Please review the reported information. If the current year's value is correct, please confirm that data is correct as initially submitted. If incorrect, please revise.  Current year value is \$0.00, while the previous year's value was larger than \$0.00. Please review the reported information. If the current year's value is correct, please confirm that data is correct as initially submitted. If incorrect, please revise.  Current year value is either at least 100% more than or 50% less than the previous year's value. If the current year's value is correct, please confirm that data is correct as initially submitted. If incorrect, please revise.

# XML and XSD

The XSD schema provides information on the name of each XML element and what type of element it is.

The XML schema is the actual file being uploaded into OLDC that contains the data from the agency.



# SmartForm

- A SmartForm is the tool for grant recipients without a state database to collect their CSBG Annual Report.
  - OCS releases SmartForms to grant recipients annually.
- SmartForms have built in error and warning validations.
- It is recommended to review each year's SmartForm to see if anything has changed in validations or language. It is also useful for understanding the data fields within context.

[illegible]

# Additional Fields (Header Rows)

The additional fields document defines the header rows of the XML that identifies who the XML is being submitted for. This should be reviewed each year for the most up to date list of eligible entities (as provided by the state office in the CSBG Eligible Entity List) and important identifying information for that fiscal year (i.e., reporting dates, grant number, grantee name, etc.).

State Name	GRANTEENAME	ELIGIBLEENTITY	orgAbbrev	programAcronym	UEI	reportPeriodStartDate	reportPeriodEndDate	grantNumber	subGrantee
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Alabama Council on Human Relations, Inc.	ACF	CSBG	NM15TJNTXJM8	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Agency of Northeast Alabama, Incorporated	ACF	CSBG	HSXZK11LPLJ5	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Agency of Northwest Alabama, Inc.	ACF	CSBG	TJGCN438LB25	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Agency of South Alabama	ACF	CSBG	LICFLSSH88E1	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Agency of TCRCC	ACF	CSBG	KZEPNYBRARE9	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Committee, Inc. of Chambers-Tallapoosa-Coosa	ACF	CSBG	G8RJUR6LSLJK3	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action of Etowah County, Inc.	ACF	CSBG	JFQCNESYDMV3	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Partnership Huntsville Madison and Limestone Counties, Inc.	ACF	CSBG	KJ1KJ91JMU01	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Partnership of Middle Alabama, Inc.	ACF	CSBG	JNQHWKACMK3	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Action Partnership of North Alabama, Inc.	ACF	CSBG	CWA3M48K2KQ3	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Community Service Programs of West Alabama, Inc.	ACF	CSBG	GKJYK54UW87	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Macon Russell Community Action Agency, Inc.	ACF	CSBG	LWKMJCYN3NG8	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Mobile Community Action, Inc.	ACF	CSBG	YC9MUGJNF424	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Montgomery Community Action Committee & CDC, Inc.	ACF	CSBG	ETS4KL55SVK1	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Organized Community Action Program Inc.	ACF	CSBG	XM94F912XBN6	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Pickens County Community Action Committee, and Community Development Corporation, Inc.	ACF	CSBG	XQGHGCG7BF9Q6	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Southeast Alabama Community Action Partnership, Inc.	ACF	CSBG	Z3YNAXQNGHNS	2023-10-01	2024-09-30	2401ALCOSR	1
Alabama	ECONOMIC AND COMMUNITY AFFAIRS, ALABAMA DEPARTMENT OF	Walker County Community Action Agency, Inc.	ACF	CSBG	PSK3J56MSQ4	2023-10-01	2024-09-30	2401ALCOSR	1
Alaska	AK DEPARTMENT OF COMMERCE COMMUNITY ECONO	Rural Alaska Community Action Program, Inc.	ACF	CSBG	QLQJHJWR72258	2023-10-01	2024-09-30	2402AKCOSR	1



# RESOURCES AND REMINDERS

# Reaching PEAAK through Training and Technical Assistance

- Grant Recipients have a wide range of tools, training, and technical assistance available to support a complete and timely submission.

Tools	Training	Technical Assistance
<ul style="list-style-type: none"><li>• CSBG Annual Report Toolkit</li><li>• SmartForms</li><li>• Vendor Portal</li><li>• Online Data Collection System</li></ul>	<ul style="list-style-type: none"><li>• <i>Understanding the CSBG Annual Report for Performance Series</i></li><li>• Recorded Webinars</li></ul>	<ul style="list-style-type: none"><li>• Data and Evaluation Specialist</li><li>• FY24 Annual Report Office Hours</li><li>• Targeted TTA Referrals</li></ul>

# Tools

- [CSBG Annual Report Toolkit](#)
- [Vendor Portal](#)
- [Online Data Collection \(OLDC\) System](#)
- [NASCSP Training and Technical Assistance Tools](#)\*

\*Resources developed under the CSBG Performance Management Alignment Training and Technical Assistance (PMATTA) Cooperative Agreement (90ET0506)

CSBG Fact Sheet	+
Grant Recipients Resources	+
Grant Recipient Spotlights	+
Policy & Guidance	+
Reports	+
Laws and Regulations	+
CSBG FAQs	+
Contacts	+

## Grant Recipient Resources

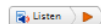


- CSBG State Plan Toolkit
- CSBG Tribal Plan Toolkit
- CSBG Annual Report Toolkit
- CSBG Project Impact Toolkit
- CSBG Disaster Supplemental Toolkit
- CSBG Events Calendar
- CSBG Webinars

# Trainings

- [Leveraging Systems and Tools for Annual Report Submissions](#) (CSBG Events Calendar)
- [On-Demand Webinars](#) (previously recorded)

## CSBG Events Calendar



Publication Date: July 3, 2023 Current as of: November 1, 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)
December 3, 2024	1:00-2:00 p.m. ET	FY24 CSBG Annual Report Webinar Series: Using State Systems for Reporting	To provide guidance on submitting the FY24 CSBG Annual Report using your state database system.	<a href="#">FY24 CSBG Annual Report Webinar Series: Using State Systems for Reporting Registration</a>
December 5, 2024	2:00-3:00 p.m. ET	FY24 CSBG Annual Report Webinar Series: Understanding and Troubleshooting SmartForms	Intended for state, territory, and eligible entity staff utilizing SmartForms for the submission of Modules 2-4. This webinar will review common technical issues with SmartForms, strategies to troubleshoot, and best practices for a timely submission.	<a href="#">FY24 CSBG Annual Report Webinar Series: Understanding and Troubleshooting SmartForms Registration</a>
December 9, 2024	2:00-3:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Accessing the Online Data Collection	Intended for states and territories to understand how to request new user accounts, navigate OLDC, and troubleshoot common issues.	<a href="#">FY24 CSBG Annual Report Webinar Series: Accessing the Online Data Collection Registration</a>

# FY24 CSBG Annual Report Training

## Understanding the CSBG Annual Report for Performance

- **October 15:** FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff
- **October 23:** Submitting the State Administration Module
- **November 14:** Explaining Eligible Entity Expenditures, Capacity, and Resources
- **November 19:** Capturing Community Level Transformation
- **November 21:** Collecting Individual and Family Characteristics

## 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

## Next Webinar

### **FY24 CSBG Annual Report Webinar Series: Understanding and Troubleshooting SmartForms**

**December 5, 2024, 2:00–3:00 p.m. ET**

Intended for state, territory, and eligible entity staff utilizing SmartForms for the submission of Modules 2-4. This webinar will review common technical issues with SmartForms, strategies to troubleshoot, and best practices for a timely submission.

Advanced Registration Required: [CSBG Events Calendar](#)

# 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](#)

# NASCSP Contacts

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# THANK YOU