# A Guide to the OLDC System & Community Services Block Grant (CSBG) Application Submission Process

**Community Services Block Grant (CSBG)**
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# **Agenda**

- Introductions

- OLDC Overview

- Accessing OLDC System

- Submitting the SF-424M

- Uploading a CSBG Tribal Plan

- Submitting Application Materials Online

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# **Introductions**

- Nicole Oxendine, Director
  CSBG Tribal Training & Technical Assistance Program

- Niki Frazier, Senior Records Specialist
  Office of Community Services (OCS)

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# Online Data Collection (OLDC) System Overview

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# OLDC Overview

- Allows for forms to be submitted quickly and securely.

- OLDC roles are based on Grantee **Job Types:**
  - **Data Entry Person** - Edits and enters data into reports
  - **Grant Administrator** - Performs all actions of Data Entry, as well as initiating, certifying, submitting and unsubmitting forms
  - **Authorized Official** - Reviews and certifies reports

- If the roles from last year are remaining the same, there is no need to submit a new form!

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# Register OLDC Accounts

- Fill out the **OLDC Access Form** (Attached).

- Everyone must have their own account.

- Each person must have CSBG assigned to their account.

- Each tribe should have at least one Grant Administrator assigned. Authorized Official and Data Entry Person are optional.

- Verify that you have an account and the right role.
  - Submit completed forms by **August 8**
  - Niki Frazier, nikita.frazier@acf.hhs.gov

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# **<u>Usernames and Passwords</u>**

- New users will receive their username and password via two emails. Received from:
  - [noreply@grantsolutions.gov](mailto:noreply@grantsolutions.gov)

- Contact the helpdesk if either email is not received.
  - Phone: 1-866-577-0771
  - [help@grantsolutions.gov](mailto:help@grantsolutions.gov)

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# **Logging In to OLDC**

- All users will access the Online Data Collection (OLDC) system via GrantSolutions (https://www.grantsolutions.gov).

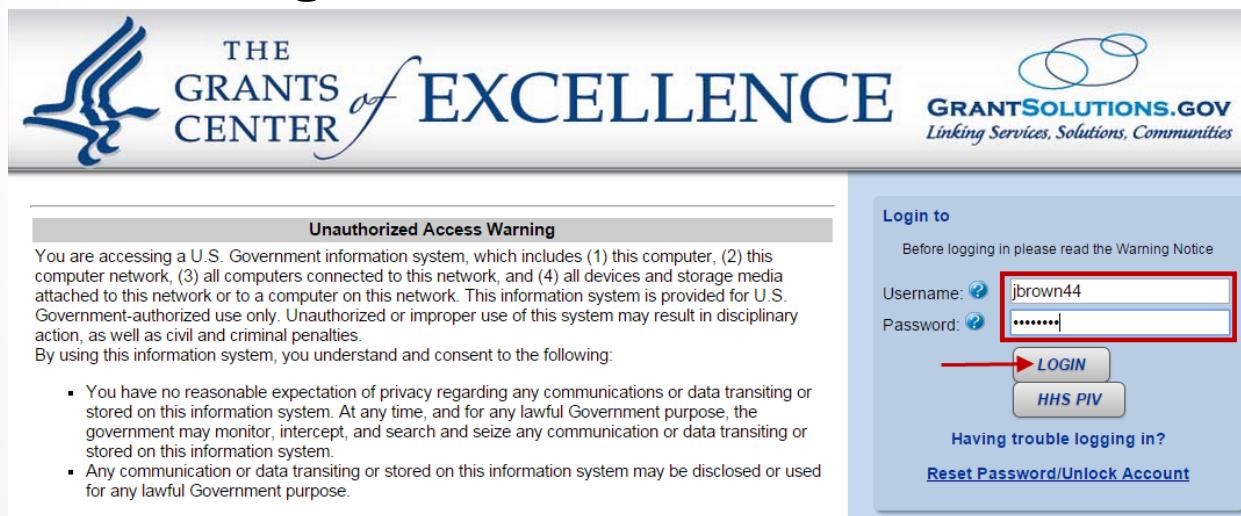- Grantees with access to OLDC will continue to use their current OLDC login credentials in GrantSolutions.

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# Log In

- The Grants Center of Excellence homepage displays.
- Click **Login to GrantSolutions**.

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# Log In

- From the GrantSolutions Login screen, enter your username and password.

- Click the **Login** button.



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

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# Log In (New users)

- Change your password upon first logon.
- Enter current password, a new password, and confirm new password.
- Click the Change Password button.

**Change Password**

Click on "Change Password" to save the new password.

| | |
|---|---|
| Current Password*: | •••••••• |
| New Password*: | ••••••••••• |
| Confirm New Password*: | ••••••••••• |

**Change Password**

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# Log In (New Users)

- The "Change Challenge Question" screen displays. Select a **Challenge Question** and enter an **Answer**.

- Click the **Save Q and A** button.

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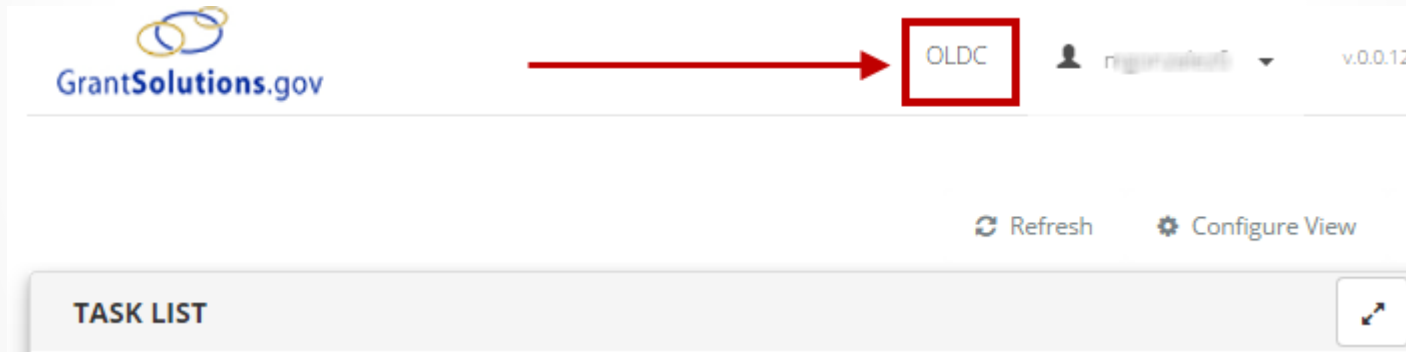
# Log In

- Passwords must be changed every 420 days
  - A message prompts the user to change their password upon login

- If the password is not changed within the timeframe, the account is disabled for security purposes
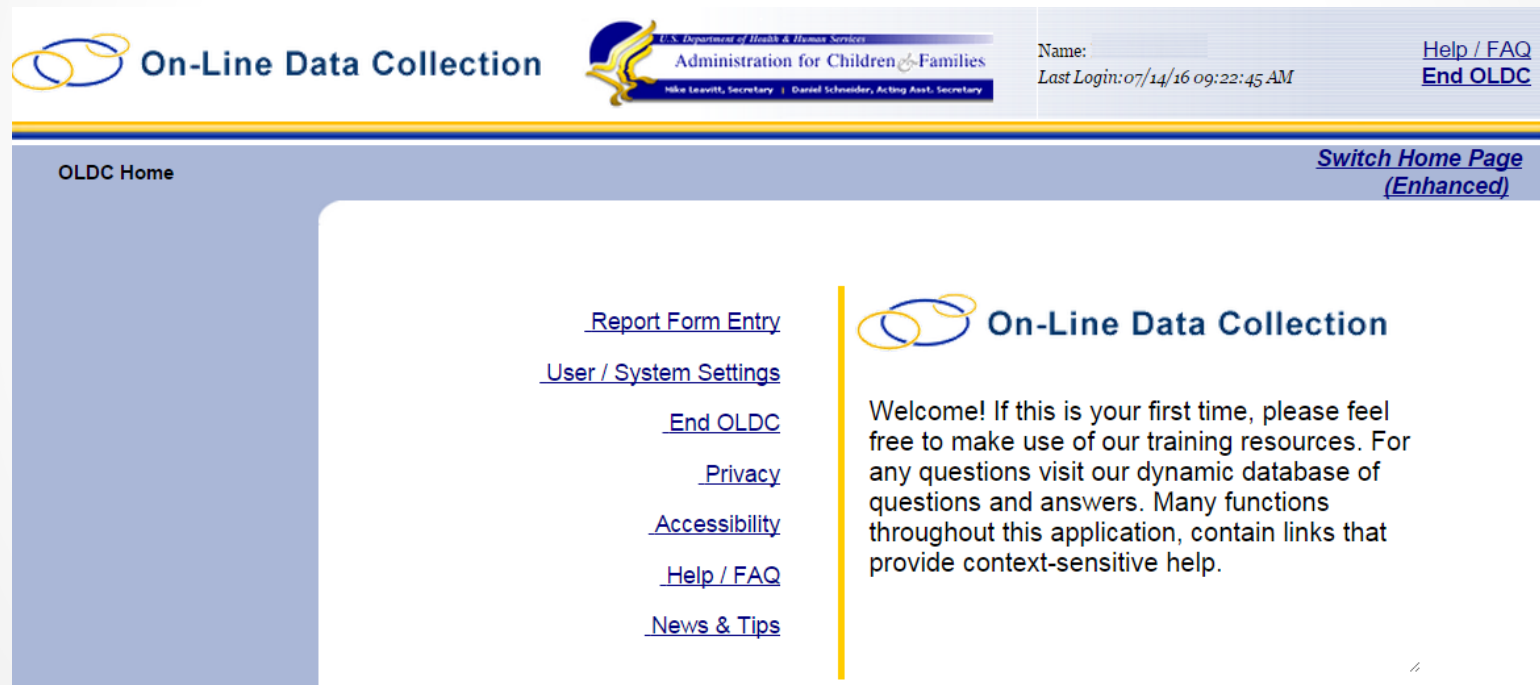  - Contact the helpdesk to re-enable the account

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# **Accessing OLDC**

- The "GrantSolutions – Portal" screen appears.

- From the menu bar, select **OLDC**.

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# **Accessing OLDC**

- The "OLDC Home" screen opens in a new window.

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# Regular Vs. Enhanced Version

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# OLDC Home

## OLDC Main Menu

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

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

- News & Tips
  - o OLDC Documentation

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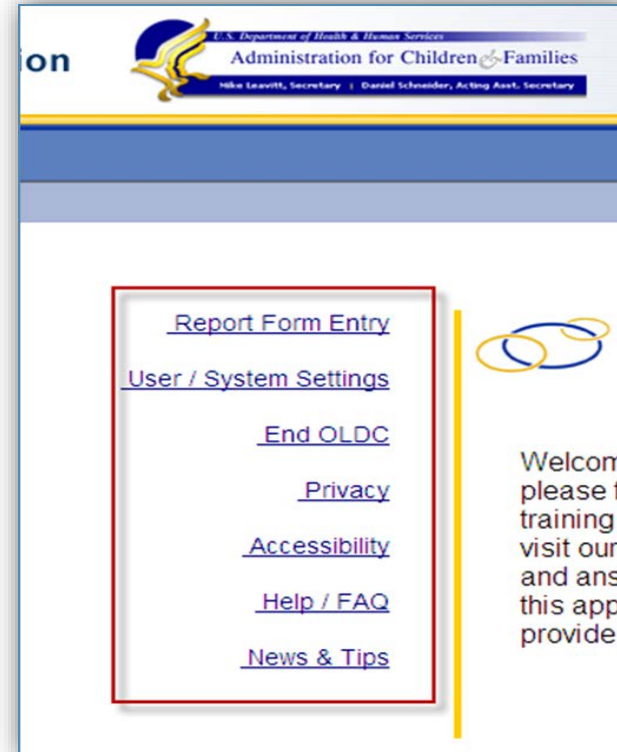Training & Technical Assistance Program
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# OLDC Home: Tabs

- **My Recent Activity:** Displays all reports recently accessed by the user. Possible Actions include:
    - **View:** View a report in read-only mode
    - **Edit:** Access the "Report" screen in edit mode
    - **Report Status:** Navigate to the "Report Form Status" page

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# OLDC Home: Tabs

- **Activity Report:** Search for reports in progress, submitted, or approved over the past two years. To access historical data, use the *Report Form Entry* link from the main menu. Possible Actions include:
  - o **View:** View a report in read-only mode
  - o **Edit:** Access the "Report" screen in edit mode
  - o **Report Status:** Navigate to the "Report Form Status" page

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# OLDC Home: Tabs

- **Report Due:** Access reports that are currently available for submission. Once a report is submitted, it is removed from this tab but can still be accessed from My Recent Activity, Activity Report, and from the Report Form Entry menu.
    - o **View:** View a report in read-only mode
    - o **Create:** Start a new report by navigating to the "Report" screen in edit mode
    - o **Edit:** Access an existing report in edit mode
    - o **Report Status:** Navigate to the "Report Form Status" page

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# Submitting the SF-424M

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# The SF-424M

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

- A Tribe or Tribal Organization must submit an electronic application (SF-424M) to receive CSBG funds. If a grantee submitted a two-year application, the grantee is still required to submit a SF-424M along with an annual report.

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# Submitting the SF-424M

- From the enhanced Home page, click the **Report Entry Form** tab on the left.
- From the Form Selection screen, complete each field:
    1. Program Name: Community Services Block Grant
    2. Grantee Name: Your Tribe
    3. Report Name: Mandatory SF-424M
    4. Report Period: Current Fiscal Year (October 1 – September 30)
    5. Select Action: New/Edit/Revise Report



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# **Submitting the SF-424M**

- If submitting a new one-year plan, select "Plan", "Annual" and "Initial".

- If submitting a new two-year plan, select "Plan", "Other", "Initial".

- If submitting for the second year of a two-year plan, select "Plan", "Other" and "Update".

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# Report Entry: Attachments

- **Attachments:** Attach files by clicking the paper clip at the bottom of the form.
  - View all attachments from the "Report Form status" page or using the "View/Add Attachments" button.

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# Report Entry: Attachments

- The pop-up message "Changes made on this screen will be lost without saving the data" appears. Click **OK** to continue or **Cancel** to return to the section page.
  - The pop-up message appears even if the data is already saved.
  - The pop-up message will appear every time you navigate away from a section.

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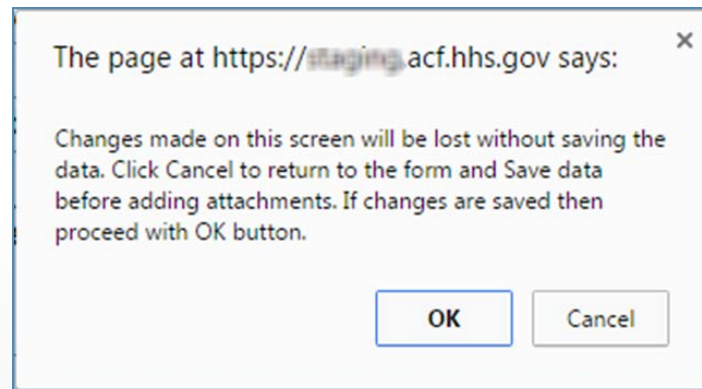
# Report Entry: Attachments

- The "File Attachment" screen appears.
- Click the **Choose File** button.
- Navigate for the document to attach.
- Select the file and click the **Open** button.
- The "File Attachment" screen reappears with the file name shown.
- Click the **Attach File** button.

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# Report Entry: Attachments

- The "File Attachment" screen refreshes and the document is attached.

- The *Attachments for* table contains the following columns:
  - **Cell Location**: Cell to which the document was attached
  - **File Name**: Document name link. Click the link to open the attachment
  - **Date Received**: Date file attached
  - **Delete**: Click **checkbox** and then click the **Deleted Selected File(s)** button to remove the attachment

- Repeat the previous steps to add additional attachments.

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# Reports: Validate

- From the Report screen, click the **Validate** button.

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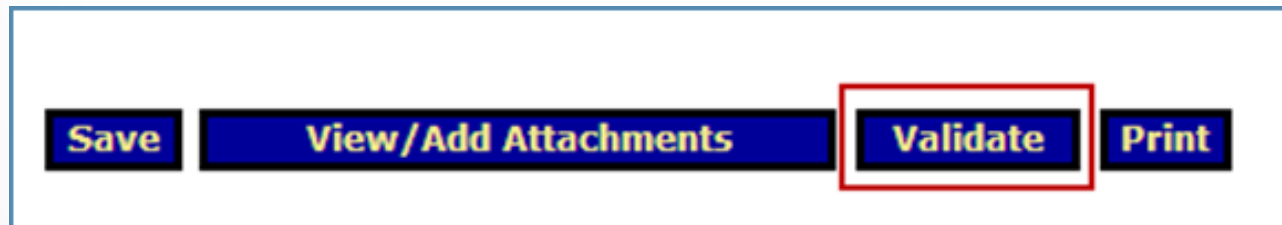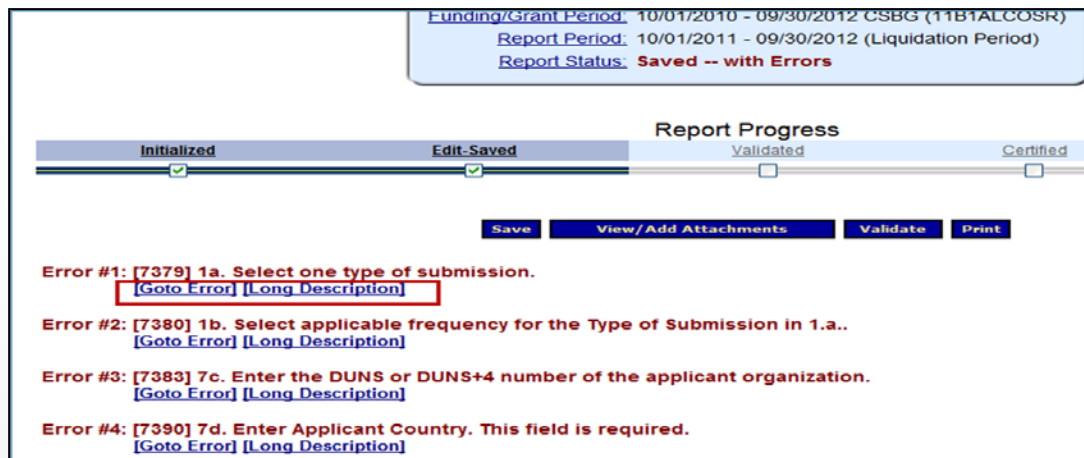
# Reports: Validate

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

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

- **Saved with Errors**: An error message appears at the top of the form. Reports with errors cannot be certified and have the status "Saved with Errors". Errors must be corrected.

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# Reports: Validate

- Reports with warnings or errors display a message with a short description of the issue just below the Action buttons.
  - Click the **Go to Error** link to jump to the field on the screen in question.
  - Click the **Long Description** link for more detailed information about the issue.

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# **Reports: Validate**

- Resolve the error on the screen and then re-validate the Report Form.

# **Reports: Certify**

- After a report form has been successfully saved and validated, a person with the appropriate role can Certify the report form with a digital signature.
  - When clicking the Certify button, the following message appears: "Changes made after saving this form will be lost. You have the ability to sign in the signature area by pressing the **Click to Sign** button. This will complete your Certify process and officially sign this form."
  - Click **OK**.

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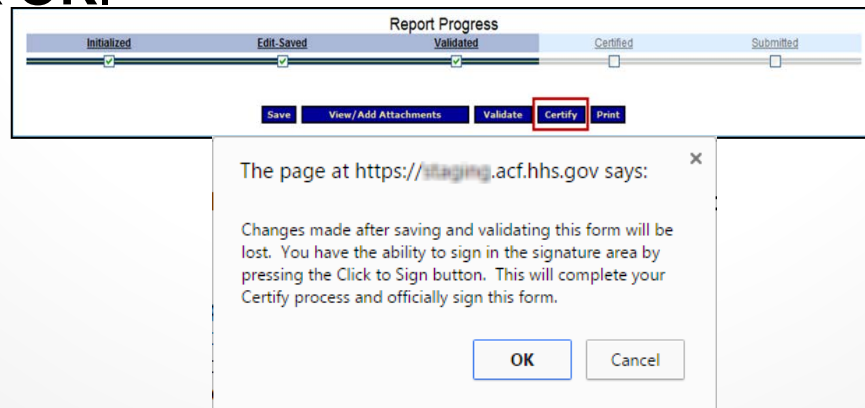
# Reports: Certify

- The screen jumps to the Certification section. Click the **Click to Sign** button.
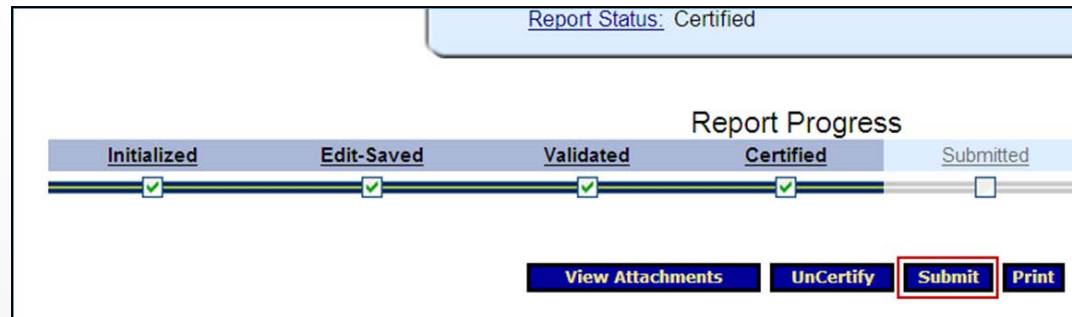
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# Reports: Submit

- When the form is electronically signed, it displays a Certified status.

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

- The report form is now ready to be submitted. Only a person with the role "Submit" has the Submit button. Click **Submit** to officially send the report to ACF.

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# Reports: Submit

- The "This will officially submit your report to ACF. Do you wish to continue" message displays. Click **OK**.

- After submitting a report form, the "Report Form Status" screen appears.
  - The message "We have received your report. This page shows all reports we have received along with attachments" displays. Click **OK**.

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# Reports: Status Page

- The "Report Form Status" page contains four sections:

    1. Report Form Status: Contains button to View Original report or any Revisions, the Report Status, Status Date, Report Action, and Print option.

# **Reports: Status Page**

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

### Report Status History

| Report Submissions: | Report Action: | Date/Time: | User Name: | Change (if known): |
|---|---|---|---|---|
| Original | Submitted | 05/31/2013 04:23:38 PM | Oldc Test5 | |
| Original | Certified | 05/31/2013 04:17:51 PM | Oldc Test5 | Signed as Authorized Official |
| Original | Saved -- Validated | 05/31/2013 04:15:01 PM | Oldc Test5 | |
| Original | Saved -- with Errors | 05/31/2013 04:11:18 PM | Oldc Test5 | |
| Original | Saved | 05/31/2013 04:09:30 PM | Oldc Test5 | |
| Original | Saved -- with Errors | 05/31/2013 04:09:28 PM | Oldc Test5 | |
| Original | Saved | 05/31/2013 04:09:18 PM | Oldc Test5 | |
| Original | Saved -- Validated | 05/31/2013 04:09:15 PM | Oldc Test5 | |
| Original | Saved -- with Errors | 05/31/2013 04:03:28 PM | Oldc Test5 | |
| Original | Saved -- Validated | 05/31/2013 04:02:54 PM | Oldc Test5 | |

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# **Reports: Status Page**

3. Contacts: People listed as primary contacts for the program and report.

| Contacts | | |
|---|---|---|
| **Contact Name:** | **Telephone #:** | **E-mail:** |
| Bala Ala | Not Available | vijip@smdi.com |
| Winston Gonzalez | Not Available | winston.gonzalez@acf.hhs.gov |
| ala bala | Not Available | vijip@smdi.com |

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# **Reports: Status Page**

4. Remarks History: Contains any remarks added by
   Federal staff.

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# Reports: Submitting

Form goes forward

**Submit -- official submission to ACF**

**Certify -- applies electronic signature**

**Validate - mathematical and rules checks; saves data**

**Save - retains information**

Form needs editing

*To edit a form, it must be Unsubmitted and UnCertified*

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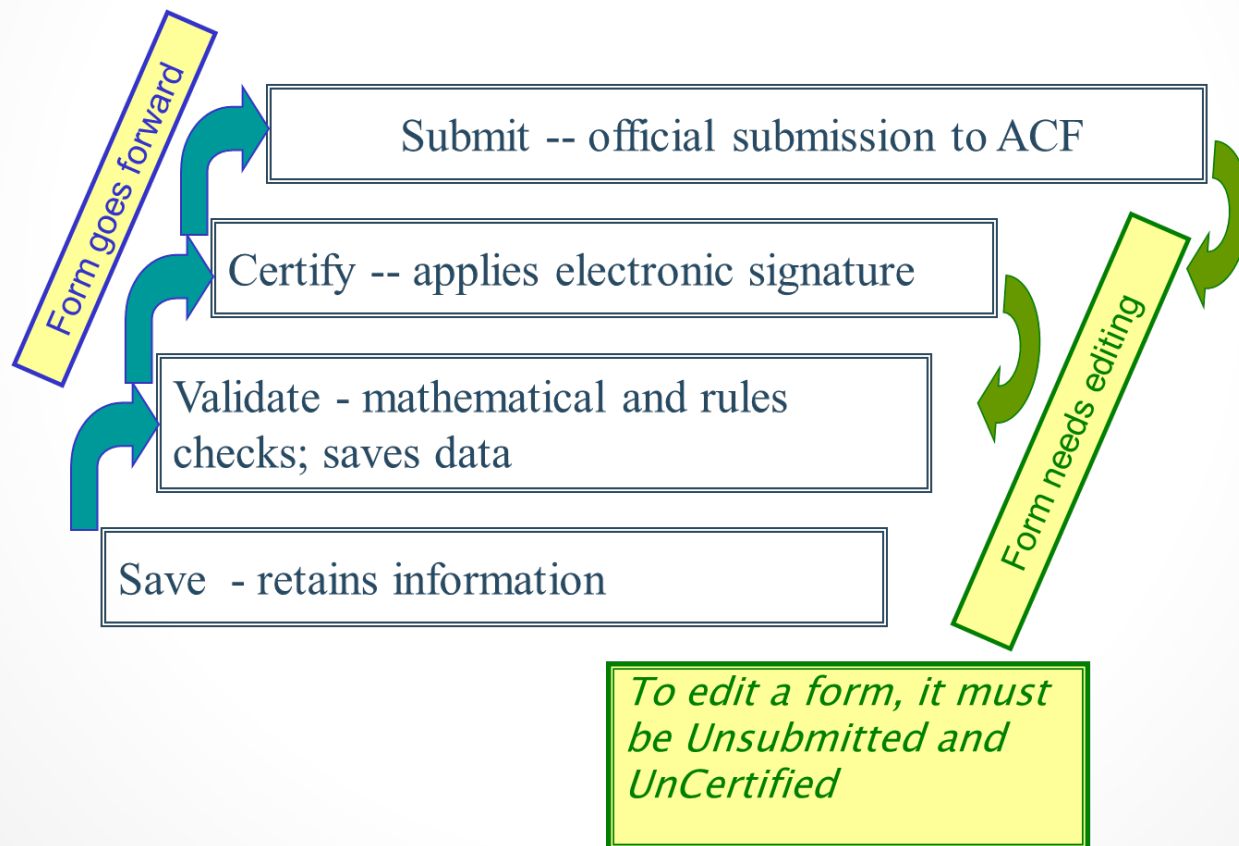
# **<u>Report Form</u>**

- It is important to save often. After 30 minutes of inactivity from your computer to the OLDC server, a warning message appears stating that you will be logged out in 20 minutes
  - o Click **OK** to continue working, otherwise any information not saved is lost
  - o Activity includes **Saving, Printing, Validating, Certifying, Submitting**, etc.

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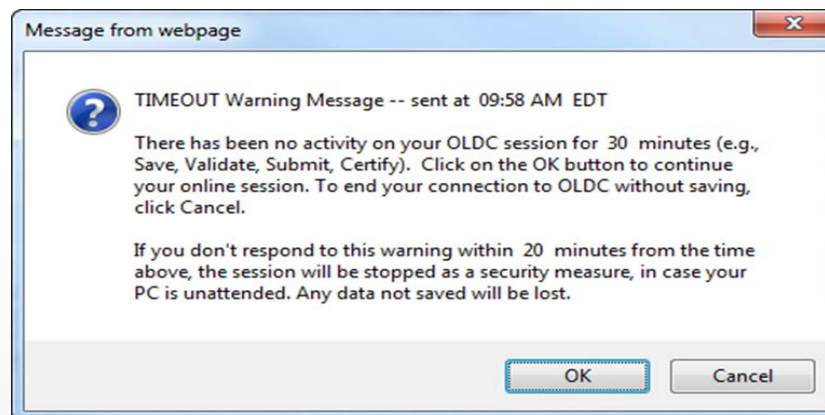
# **Reports: End OLDC**

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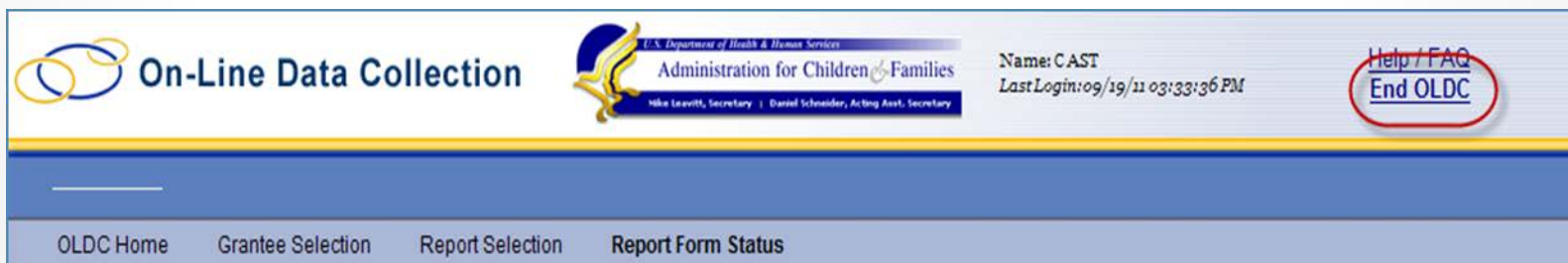
# Help is Available!

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# Need Assistance? Help is Available!

<u>CSBG Tribal Training & TA Team at Lux</u>
Nicole Oxendine - nicole.oxendine@luxcg.com
Lizette Rivera - lizette.rivera@luxcg.com
Tribal TA email - tribalta@luxcg.com
www.csbgtribalta.com

<u>OCS - Tribal Team</u>
Sara Lee - sara.lee@acf.hhs.gov
Jane Golden - jane.golden@acf.hhs.gov
Niki Frazier – nikita.frazier@acf.hhs.gov
CSBG Tribal email - CSBGTribes@acf.hhs.gov

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