

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

This presentation was created by Lux Consulting Group, Inc. in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Community Services Block Grant Number contract number HHSP233201100175A





# <u>Agenda</u>

- Introductions
- OLDC Overview
- Accessing OLDC System
- Submitting the SF-424M
- Uploading a CSBG Tribal Plan
- Submitting Application Materials Online





# **Introductions**

- Nicole Oxendine, Director CSBG Tribal Training & Technical Assistance Program
- Niki Frazier, Senior Records Specialist Office of Community Services (OCS)





# Online Data Collection (OLDC) System Overview



Community Services Block Grant (CSBG) Training & Technical Assistance Program for Tribes and Tribal Organizations

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# **OLDC Overview**

- Allows for forms to be submitted quickly and securely.
- OLDC roles are based on Grantee Job Types:
  - o 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!





# **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
  - o Niki Frazier, nikita.frazier@acf.hhs.gov





#### **Usernames and Passwords**

- New users will receive their username and password via two emails. Received from:
  - o noreply@grantsolutions.gov
- Contact the helpdesk if either email is not received.
  - o Phone: 1-866-577-0771
  - o <u>help@grantsolutions.gov</u>





# Logging In to OLDC

- All users will access the Online Data Collection (OLDC) system via GrantSolutions (<u>https://www.grantsolutions.gov</u>).
- Grantees with access to OLDC will continue to use their current OLDC login credentials in GrantSolutions.





# <u>Log In</u>

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









# Log In

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



You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action. as well as civil and criminal benalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.



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





# 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 I	Password
Click on "Change Password	d" to save the new password.
Current Password*:	•••••
New Password*:	•••••
Confirm New Password*:	•••••
Confirm New Password*:	Password





# 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.

Change Challenge Question	
	Change Challenge Question
	The Challenge question and answer are used to validate your request for a new password.
	Challenge Question*: What is your mother's maiden name?
	Answer*:
	Save Q and A





# 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
   O Contact the helpdesk to re-enable the account





#### **Accessing OLDC**

- The "GrantSolutions Portal" screen appears.
- From the menu bar, select OLDC.

Grant <b>Solutions</b> .gov	OLDC I regeneration v.0.0.12
	🕫 Refresh 🛛 🌣 Configure View
TASK LIST	2





#### **Accessing OLDC**

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







#### **Regular Vs. Enhanced Version**

OLDC Home								Sw	itch Home Page (E	nhanced)
			Report Form I Analytical Reg User / System Sett End Q Pri Accessi Help // News &	ports tings Fo PLDC sp ivacy ap ibility usu EAQ	or most user ocess of loci ecific report series of que propriate re	-Line Data Co s, this is the first step ating and working wi s. The following scre estions to help you s port form. This same the status of any cu ort.	p in the th your ens present elect the e process is			
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OLDC Home			Yes No					Switch	Home Page (I	Regular)
Report Form Entry							·			
User / System Settings End OLDC										Page Help
Privacy								S	earch Box	Q
Accessibility	Program Name	Grantee Name	Grant	Report Na	me F	Reporting Period	Activity Date	Report Status	Actions	L.
Help / FAQ	Temporary Assistance for Needy Families	MA [ ] ] MASSACHUSETTS	N/A	Application 424M		0/01/2014 - 9/30/2015	06/12/2015 11:06:16 AM	Submitted with Warnings	Actions 👻	
<u>News &amp; Tips</u>										





# **OLDC Home**

#### **OLDC Main Menu**

- Report Form Entry
  - o Initiate report
  - o Enter data
  - Retrieve previous or current reports
- User/System Settings
  - Customize the way OLDC is used
- News & Tips
  - OLDC Documentation







## **OLDC Home: Tabs**

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

My Recent Activity	Activity Report Report I	Due					
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						S	earch Box
Program Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
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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:
  - View: View a report in read-only mode
  - o Edit: Access the "Report" screen in edit mode
  - Report Status: Navigate to the "Report Form Status" page

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Help / FAQ					This	report was generated	I on: 06/19/2015:14:10:	Contract of Contract of Contract
News & Tips							Search Box	1
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	N/A	Application SF-424M	10/0	01/2013 - 09/30/2014	09/30/2015	Saved	Actions -	





# **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
  - Create: Start a new report by navigating to the "Report" screen in edit mode
  - o Edit: Access an existing report in edit mode
  - Report Status: Navigate to the "Report Form Status" page

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News & Tips		Report Name	Reporting Period	Due Date	Report Status	Actions
News & Tipa	Grant			09/29/2016		Actions -
News & Tips	Grant N/A	Application SF-424M	10/01/2014 - 09/30/2015			
News & Tips		Application SF-424M Model State Plan(CSBG)	10/01/2014 - 09/30/2015 10/01/2014 - 09/30/2015	09/29/2016		Actions -
News & Tips	NIA	and the second se		09/29/2016	Saved	Actions -





# **Submitting the SF-424M**





### **The SF-424M**

- On October 1, 2013, ACF directed its program offices, including OCS, to require all mandatory grantees to submit applications electronically. (See <u>78 FR 60285-60286, October 1, 2013</u>.) 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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			Add Attachments Validate Print			
		SP	- 424 - MANDATORY			
						Control No: 4040 Expires 05/31/2
1.a. Type of Submission Plan Funding Request	Other	•	* 1.c. Consolidated Applicati Request2 Explanation:	on/Plan/Funding	*1.d. Version: Initial Resubmission Revision	OME APPROV Control Ny: 4040 Explore 05:31/2 Version 01.1
Plan	Annua	•	Request?	on/Plan/Eunding	Initial     Resubmission	Cantest No. 6040 Reprint 061472 Verysign 01.1
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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
  - Report Name: Mandatory SF-424M
  - Report Period: Current Fiscal Year (October 1 – September 30)
  - 5. Select Action: New/Edit/Revise Report

Report Form Entry	My Recent Activi		
nalytical Reports	F Please use the drop-down lists bek	form Selection w to make selections. Skeps must	t be completed in order.
Iser / System Settings	Step 1. Program Name. Community	Services Block Grant	8
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ind OLDC	Step 3 Report Name: Mandatory 0	Grant Application (SF-424 - M)	
Step 4	Report Period		
10.1010	Reporting Period	Type	Report Statu
cessibility	<ul> <li>1001/2016 - 09/30/2017</li> <li>1001/2015 - 09/30/2016</li> </ul>	Annual Annual	Submitted with Warnings
	0 10012014-09002015	Annual	Submitted with Warnings
elp / FAQ	0 10/01/2013 - 09/30/2014	Annual	
ews & Tips	0 10012012-09092013	Annual	
Step 5:	Select Action: New / Edit / Revise Report		





### **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".

OLDC Home Form Selection Report	Report Form Status			
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Initialized	Lot. Send	Report Progress	Certified	Submitted
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		APPLICATION FOR FEDERAL ASSISTANCE SF - 424 - MANDATORY		
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<ul> <li>1.a. Type of Submission:</li> <li>Plan</li> <li>Funding Request</li> </ul>	* 1.b. Frequency: * Annual	<u>* 1.c. Consolidated Application</u> Request?	/Plan/Funding <u>*1.d. Version</u> : initial © Resubmission	
- Funding Request	Other	Explanation:	Revision	
	* Other (Specify)	2. Date Received; 3. Applicant Identifier;	O Update State Use Only:	





- 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.

18a. Typed or Printed Name and Title of Authorized Certifying Official	18c. Telephone (area				
	18d. Email Address				
18b. Signature of Authorized Certifying Official	18e. Date Report Sub				
Attach supporting documents as specified in agency instructions					





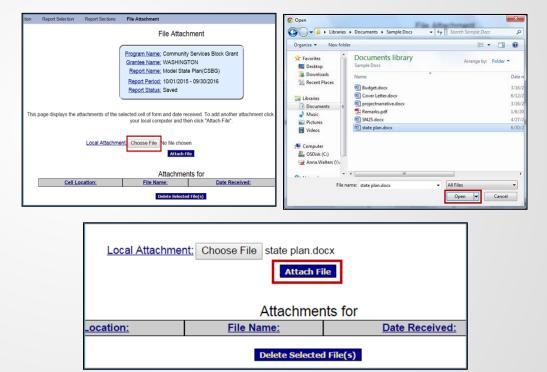
- The pop-up message "Changes made on this screen will be lost without saving the data" appears. Click OK to continue or Cancel to return to the section page.
  - The pop-up message appears even if the data is already saved.
  - The pop-up message will appear every time you navigate away from a section.

The page at https://magi	acf.hhs.g	gov says: ×
Changes made on this screen we data. Click Cancel to return to the before adding attachments. If of proceed with OK button.	the form and S	Save data
	ок	Cancel





- 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.







- The "File Attachment" screen refreshes and the document is attached.
- The Attachments for table contains the following columns:
  - o Cell Location: Cell to which the document was attached
  - File Name: Document name link. Click the link to open the attachment
  - o 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.

		File Attachment			
		Pagean Name. Commonly Service Book Genet Genetics Name. Motion Biol: Or Concentration Based Paylor and Service Service Service Service Based Paylor Status, 1997-001. 49(3):00-0017 Bigged Datas, 1997-001.			
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• From the Report screen, click the Validate button.







- **Saved -- Validated**: There are no errors and the form is ready to be certified.
- Validated -- with Warnings: The report form is saved and validated and there are some errors on the saved form. However, these errors are allowable and the report may still be submitted.
- Saved with Errors: An error message appears at the top of the form. Reports with errors cannot be certified and have the status "Saved with Errors". Errors must be corrected.





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







• Resolve the error on the screen and then revalidate the Report Form.

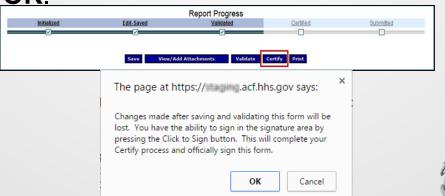






#### **Reports: Certify**

- 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."
  - o Click OK.



Community Services Block Grant (CSBG) Training & Technical Assistance Program

for Tribes and Tribal Organizations



#### **Reports: Certify**

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

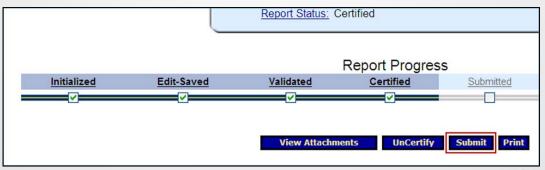






#### **Reports: Submit**

- 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.

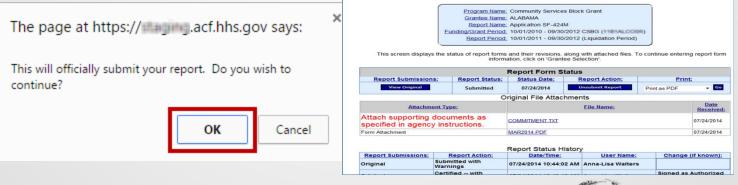






#### **Reports: Submit**

- 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.







- The "Report Form Status" page contains four sections:
  - <u>Report Form Status</u>: Contains button to View Original report or any Revisions, the Report Status, Status Date, Report Action, and Print option.

Report Form Status					
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:	
View Original	Submitted	05/31/2013	Unsubmit Report	HTML Print Form 🛛 🔽	





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

Description of the standard standard	Description and a set of the set	Date /Times	Line of Manager	Observes (if her succes).
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	





3. <u>Contacts</u>: People listed as primary contacts for the program and report.

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





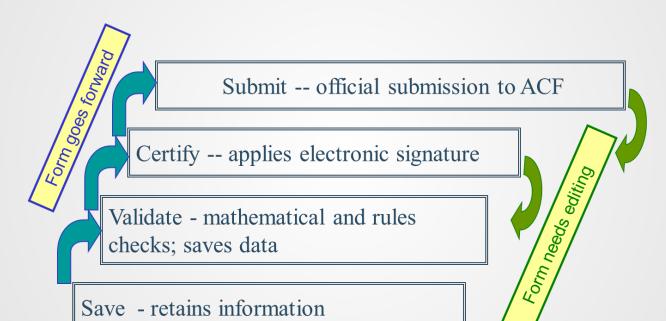
4. <u>Remarks History</u>: Contains any remarks added by Federal staff.

			Remarks History
Remark ID:	Date/Time:	<u>User Name:</u>	Remarks:





#### **Reports: Submitting**



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





#### **Report Form**

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







# **Reports: End OLDC**

#### • After each use, End OLDC

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







# Help is Available!





#### **Need Assistance? Help is Available!**

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

OCS - Tribal Team

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

