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ADMINISTRATION FOR CHILDREN AND FAMILIES
FY2019 CSBG ANNUAL REPORT
PART 1:  SMARTFORMS AND XMLs REFRESHER
JUNE 2, 2020
3:15 P.M. EST.

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      >> Welcome and thank you for standing by.  At this
time all parties are in listen only mode until the question
and answer session of today's conference.  Today's
conference is being recorded.  If you disagree, you may
disconnect.
      It is my pleasure to turn the call over to Ms. Jamia
Furbush and you may begin.
      >> JAMIA FURBUSH: Good afternoon.  Thank you.  On
behalf of the office of community services and the division
of community assistance, I would like to thank everyone for
joining today.  I am Jamia Furbush, the region alt
commercial for region, 4, 6, 5 and 9, this is the first of
a two-part sear es about submitting the FY2019CSBG report.

This will talk about the smart forms and submitting the XML to the online data collection system which is also referred to as OLDC.

Next week on June 9th, at 3:15 p.m., LCF will host the second part of this series wind chill focus on submitting into OLDC.  For some participants, this series may serve as a refresher course.

Today's webinar will be recorded and will be made available to you shortly.

Again, thank you for joining.  Now, I will pass it to Katy Kujawski and Muska Kamran of NASCSP who will provide this presentation.

>> KATY KUJAWSKI: Thank you so much, this is Katie Kujawski from NASCSP and with me today, I have Muska Kamran, our project manager.  We welcome questions.  So please put them in the chat and then we will get to those as quickly as possible.  Next slide, please.

This webinar will be on using the smartforms and the available tools an resources as they relate to smart forms and reporting.  So we know that there are some state offices out there who use a different mode of collecting data from local agencies.  So we just want to make you aware that this is very specific to the actual smart form data collection and reporting process.

Next slide, please.

A few general points that we want to make on the smart forms.  All forms are populated with the eligible entity name, DUNS number and new for '19, previous year data for all data points in modules 2 and 4, since this is our second year of reporting in this new annual report.

Also, generally speaking, and barring any other state processes, eligible entities will complete and send those XML smart forms back to their state offices.  States will review the data and the state office will be the one that exports that file to an XML file, uploads it to OLDC on the submission deadline or by the submission deadline.  And we do encourage state offices when possible to submit their data sooner rather than later so that OCF can start that data review process.

Similar to last year, states will attach module 3 as a smart form in OLDC.

Next slide.

New for FY19, is a comments document.  This is a template that was sent out to each state office.  It's a standardized way of communicating any data anomalies or

issues that you see in your data.  The use of this document is strongly encouraged for streamlining the review process, but it is not mandatory.

The document is built using dropdowns that are contingent on each other, meaning you can't access, for example, the message description without accessing the module section and data point dropdowns.

So they are all relatable to each other.  You have to go in sequential order in order for this form to behave properly.

Next slide, please.

Also for FY '19, we want to make note that we changed some rules around, comments and things that we're flagging. So we will not be flagging targeting that is outside that 80 to 100% benchmark.  Nor will we be flagging when NPIs -- where 100% of NPIs obtained were targeted.  So we do not need comments on either one of those items when you submit your data review memo to OCS.

I will pause for just a second.  I see several things in the chat.  Are there questions here, Muska.

It looks like folks are having some audio issues?

>> NIKI FRAZIER: This is Niki.  All persons on the line, if they are having audio issues they are asked to press star zero.  We have had a report that listening on audio is another remedy, which Damian has just put in the chat pod.  Thank you.

>> KATY KUJAWSKI: Excellent!  Next slide.

There were some changes to the forms for FY '19.  All changes made can be found in the OMB cleared document.  The link is on your screen and they are also included in all the smart forms as well.

So I'm going to turn it over to Muska who is going to walk us through some of the specifics, the specific changes you will see in those reporting forms.

>> MUSKA KAMRAN: Great.  Thank you, Katy.  Before we go through the demo, I will walk you through the changes, because you will notice the changes in the smart form that you will receive for fiscal year '19.  First off, we added numbering, it's now part of the official OMB forms with the original OMB package for the numbering report.  We didn't have a numbering schema for the OPMI, and we added that in after the fact and now that's part of the official corrected.

We corrected typos, for example changing carbon dioxide to monoxide.  We also removed references to

households from the other indicators.  And we changed -- for each of the NPIs, the first column used to say number of participants served.  We know that that caused confusion regarding whether a participant was considered an individual or a household.  So we have updated that language to now read that it is the number of individuals served in the program.  So at all times in the NPIs, we should be counting the individuals.

There was a slight change in the income and asset building indicators.  So previously, we had FNPI, 3E, for those who used their savings to purchase an asset, and 3E.1, and of those who purchased a home with the new changes, the individuals who purchased a home have been separated out and into its own NPI instead of being categorized of FNPI are 3e.

In the housing dough main for the NPIs, we have updated all of that language to read only individuals.  So previously it read households.  Again, we have changed that to individuals, so that you only should ever be reporting a count of individuals in any of the NPIs.

FNPI7, this is a tricky one.  And I know it was tricky for the entire network.  Previously this was named outcomes across multiple domains and we have renamed it to outcomes achieved across one or more domains and the reason for that change is because the original intent of this NPI has always been to try to capture the unduplicated count of individuals who obtained any outcome at the agency.  So whether that was just one outcome or whether that was ten outcomes, the intent of this NPI was to just get that number of individuals who got any outcome at the agency, and we're hoping that this change in language more accurately reflects that.

There were no changes to the services portion of module four.  We made some slight changes to the all characteristics report as we can see on your screen.  Previously, high school graduate and equivalency diplomas were linked together.  Now we have separated them out, so you would report high school graduates separately and you would report equivalency diplomas.  And we didn't have an option for never served in the military.  We have added that in right now.  So for those who do not have a military status, because they never served, you are able to report them here now.

And then other than that, again, just some minor errors and typos that were addressed.  Nothing that will

change the intent of the data points, and for the last
change that I'm going to point out, in items E and F of the
all characteristics report, we updated that language to try
to clarify again what the intent of this section was.  So
for -- so now the language reads number of individuals who
may or may not be included in the totals above, and that is
because items E and F is where you would report your
programs that you have a count of individuals for, but you
are not sure if you are able to unduplicate it from the
count of individuals that you reported in all of the above
sections, in the all characteristics report.  So we are
hoping, again, that this language helps to clarify any and
all of that.

     And with that, we will jump into the demo for the
module 2 and module 4 submit forms.  So I will pass it over
to Katy.

          >> KATY KUJAWSKI: Okay.  Great.  Thanks Muska.

     I am sharing my screen.  So sorry, folks while this
takes a second for us to shift over.  I believe you can see
what's on my screen.

          >> MUSKA KAMRAN: I can see your screen.

          >> KATY KUJAWSKI: Okay.  Moving forward, let's start
with the module 2 smart form.  Whenever we send these to
you, we send these forms to the state offices via a
OneDrive link which has worked pretty well this year.  In
years past, we had various ways that state email systems
can accept large files.  OneDrive seems to work well and we
are excited about that.  We we want to send the forms out
to the local agencies.  The local agencies when you get
them, save the forms some place on your hard drive, on your
servers wherever makes sense.

     When you open up the files, you will need to click
enable editing.  You see this yellow bar at the top of your
screen.  If you do not see this bar, that might mean that
your macros have been disabled some way.  Sometimes email
servers have certain security measures that strip macros
from these forms and the macros are needed to ensure that
the functionality works as we expect.  So at any rate,
click the enable content button, and that enables the
macros allowing you to utilize all aspects of form.

     We do have previous year data in these forms as you
can see on the right-hand side of the screen, that's the
FY-18 data and you will go through the data entry process,
just like you did in previous years.  And in, like last
year, for example, we also are using highlighting to show

errors and warnings.  A yellow highlight is an error.  A red highlight is a warning -- I'm sorry, a yellow highlight is a warning and a red highlight is an error.  I'm sorry to be confusing.

If you see the marks on the upper right-hand corner of the cell, in this Excel document, hovering over that allows you to see the error messages.  This is something that as you are data entering, you can hover over it to see what the issue is right away.

Errors and warnings also populate as they did last year to the outstanding errors and warnings tab.  New this year, you are able to click on the issue and the -- a link will take you right to where in the form that error and warning exist -- error or warning exist.

And for state offices, as with last year, you will want to expore each of these files to XML to be able to upload them to the OLD system.  And you click the button, and find a file where it makes sense to save this -- this document and click okay.

And it will save automatically and then allow you to upload into OLDC.  I see there are some questions that came through, Muska.  Is there anything relevant to module 2 right now?

>> MUSKA KAMRAN: There is a question about when state -- when does NASCSP expect to have fiscal '19 to states that had requested export.  We will reach out to you when you will receive your transferred files.  Hopefully by the end of the week, you should be able to receive them.

>> KATY KUJAWSKI: And was that it?

>> MUSKA KAMRAN: That's it.

>> KATY KUJAWSKI: Okay.  Then I will X out of there and we can take a look at the module 4 smart form.

Which much or just like the module two smart form, it will have a yellow bar at the top of the form that you have to click to access the macros and the whole functionality of each form.  So when you click that bar, it allows you that access.

What I forgot to mention on the module 2 document is that there's an instructions tab on each module that just gives you some basic instructions.  We have many resources which Muska will go through following these demos, that are available on our website that can help you through all of these processes.

The module 4 smart form also has a table of contents, which is just a quick way to navigate to the various parts

of the form.  So you don't have to scroll back and forth each time.  Each tab on this module 4 smartphone also has a table of content.  So you can go back to where you need to go.  So you can more easily navigate this form.

Just like the module 2 form, as you enter your data, you will have errors or warnings populate, based on the data that's entered.  And one thing I do want to show you is -- what we have done for these warnings that we are no longer flagging, such as the 80 to 120% and the 100%, -- 100% achieving outcomes is we are flagging them blue to identify that this is a TNTAish issue.  This is an opportunity for the state offices to work with local agencies on, you know, targeting improvements but it's not necessarily something at the federal level that OCS is concerned about, in terms of data accuracy.  So again, that will no longer be flagged in your data review memos.

>> MUSKA KAMRAN: And just adding real quick, sorry, Katy, just adding real quick that that will no longer be flagged on the errors and warnings tag as well.  You will see it highlighted as blue, but it's not in the errors and warning tab.

>> KATY KUJAWSKI: Great point.  Thank you.

Just as in module 2 smart form, if you see the red triangles at the upper right-hand corner of any given flow, that means there's a message.  The error message in this case, which links back to the errors and warnings tab.  That's where you can see in text, exactly what you are dealing with.

So as Muska said, these errors in blue -- we won't seen call them errors.  The TNT notations will not populate on the outstanding errors and warnings tab, but anything that is an FNPI1 will.  You can click on the errors and warnings is to go back to where the error or warning is in the form.

What we did with the previous year data, we moved to year-to-year comparison.  That is at the end of the tabs on these forms.  They are in red.  We haven't broken it out but NPIs, services and all characteristics.  These are T and TA tabs for the most part.  You see, this is where you can see what changed from year to year.

So we will not be flagging year-to-year comparisons in the errors and warnings for the NPI.

The only year-to-year comparison that will show up in the errors and warnings is in the all characteristics and it's the total number of families or households served.

Are there any questions in the chat, Muska?  I can't see it when I'm in this screen.

&gt;&gt; MUSKA KAMRAN: No questions.

&gt;&gt; KATY KUJAWSKI: There have been no changes to module 3.  So I'm going to go just really quickly open that just for folks so you can just get a look at it, if you haven't had any experience with it.  It has the enable content button that you have to click for all of these forms.  All data starts with clicking on the actual cell that you want to enter information into or clicking the edit button, which pops up additional boxes.

In this form, we also have the use of check boxes where these domains the populate what you can enter into terms of outcomes expected, and strategy.

&gt;&gt; This form also has dropdowns that can be used, and you use hyperlinks in order to access the strategies and the outcome indicators to report.

Since this form is exactly the same as your FY '18 form, if state offices have collected module three in FY '18, they can simply rename that file, rather than having to transfer the information from the FY '18 module to the F Y. '19 module 3.  Any questions about any of these forms some.

&gt;&gt; MUSKA KAMRAN: There is a question that is asking what support is available for those who are new to these reports?

&gt;&gt; KATY KUJAWSKI: Reach out to us or your state office if your local agency.  Please reach out to your state office first.  If you are a state office, please reach out to us and we can get on the phone.  We can get on a webinar.  We can talk through whatever the issues are or the questions are and help you.  We also have a variety of written resources, recorded resources that Muska will walk through in just a moment.

&gt;&gt; MUSKA KAMRAN: Okay.  If that, if we could bring it back to the presentation.  Thank you.  So I'm just going to flip through these slides real quick so you can see when you access the slides after the recording is posted, you will be able to just -- if you do not want to listen to the recording all over again, you can just jump through the slides to see some screen shots of the information that we just shared and hopefully that will be just as useful to you.

I will walk through the resources right now.  They are all posted on our website and the resources include for

example, the lexicon which is a dictionary of terms related to CSBG and the annual report. For example, if you are filling out an NPI and you are not exactly sure -- the NPI for basic needs, you are not sure what that means, and you can pull up a definition for the basic needs.

We have the instruction manual. Module 3 an another. Resource. So please check those out. We do have an annual report FAQ that captures a lot of the questions as we receive them, specifically about smart forms and XML and all of that.

And in general, we have lots of other FA Qs on data analysis, crosswalks and a list of other indicators that provide common language that you can use for other indicators, that is in the NPIs. We do have review check lists for modules 2, 3 and 4, and so that would be a phenomenal tool to use before you submit your data. If you are an agency, before you submit your data to the state office. If you are a state office, before you submit your data to OCS.

And other than that, we have a lot of recorded webinars. We will have a link to this webinar and we have a link to previous webinars. And written out instructions on how to initialize and submit a module and how to submit our data. All of that can be accessed. So if you go to NASCSP.org and annual report, and then you want to scroll down on that page, and you will see a button for submission. Click on that and you will be able to access those resources specifically relevant to submission.

And then apart from that, again, you always have the OCS website to check out where the latest dear colleague notices are posted regarding the annual report and anything related to that.

And with that, are there any other questions left?

>> KATY KUJAWSKI: I can't see any of that any more. If you or someone else on the call can access that.

Are.

>> JAMIA FURBUSH: Yes have Karen Quakenbush, when does NCAA expect to have FY19 forms to states that had requested export from FY18 forms.

>> MUSKA KAMRAN: Yes, that's going back to the state offices that are requesting a transfer of data. That's relevant to a very specific number of state offices and NASCSP will reach out to those state offices to let them know when they will receive their form.

>> JAMIA FURBUSH: From Chad Courter MoCAM, where would

we find the links to the checklist.

>> MUSKA KAMRAN: That's on the NASCSP website when you go to data reporting and annual report and you can find them under submission or under tools.  Either of those, you will be able to find them there.

>> JAMIA FURBUSH: We have another question from Julie Hanley, can we get a copy of the PowerPoint?

>> MUSKA KAMRAN: Yes, we will be posting it on our website.

>> We have one more person typing in the chat and we are waiting for those to come over.  We have multiple people typing at the same time.  Karen could NASCSP send a quick reference list for reporting items changed on M4?  Will help for those receiving exported forms.  We will have needed edits flagged.

>> KATY KUJAWSKI: Yes, I believe that's already on our website, but, yes, we will ensure that it is.

>> MUSKA KAMRAN: Yes, if you go -- yep, if you go to the annual report page of our website, and you see on the main page you will see links for modules 2, 3 and 4, and you will see a link for the track changes version of the module, with the new OMB clearance.

>> Elena Vanov asked when the smart forms are due.

>> MUSKA KAMRAN: If you are a local agency, your forms will be due on the date that your state office communicates with you.  If you are a state office, all of that data is due into OLDC to OCS by July 17$^{th}$.

>> I just wanted to take a moment to thank you and hope you are safe and healthy.

Thanks.

Elena says thanks as well.

>> KATY KUJAWSKI: Thanks, Gayla, I hope you are safe and healthy too.

>> Ivan asks when will the document be available?  I'm not sure if we're talking about the smart forms again or this PowerPoint which will be on the NASCSP website, but you can address that.

Oh, he says smart forms.

>> MUSKA KAMRAN: If you are from a local agency, I would check with your state office.  If you are a state office that has not yet received your forms then check in with OCS and NASCSP.

>> Joi Greene, how can we transfer a fiscal year '18 to a fiscal year '19 if we have not already requested.

>> KATY KUJAWSKI: Just give us a call.

Alena, did I hear that the data is due to OLDC on July 17th?

    >> MUSKA KAMRAN: Correct.  The deadline to submission in the OLDC system is July 17th.

    >> Alena, I'm on the websitea tempting to locate the checklist, can you please provide those steps again.

    Muck okay.  You want to go to the maybe page of website and the top right corner, you should see CSBG, and click on the down arrow, data collection and reporting.  Once you get, there you want to click on the annual report.  And then once you get to the annual report, you want to click on tools and after scrolling down, you should be able to obtain check lists for module 2, and modules 3/4.

    >> We have an attendee typing.  Alena says thank you.  She located.

    Currently there are no persons typing.

    >> KATY KUJAWSKI: Well, I guess, folks, feel free to reach out to Muska or myself or your state offices with additional OCS, with additional questions as they come up.

    Okay.  Anything else from your end Jamia or Niki?

    >> No, nothing additional.

    >> I don't have anything additional.  I just -- I believe folks on the call are typing thank yous.

    >> I want to thank OSC for hosting this and thank all of the states.  I have know it's been a process, but we are all getting this and if you have any questions like Katy or Muska said, we are around and we know that OCS is ready and able to get this process moving.  We hope everybody is staying safe and healthy, and that you all take care.

    >> Thank you so much!

    >> Thank you, everyone.

    >> That concludes today's conference.  You may now disconnect.  Speakers, please stand by.

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