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FY2019 CSBG ANNUAL REPORT
PART 2: SUBMITTING INTO OLDC

JUNE 9TH, 2020
2:15 PM TO 3:00 PM CST

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>> OPERATOR: Thank you all for standing when I today's conference will begin shortly to allow additional participants to join. Again, thank you all for standing by. Today's conference will begin shortly.

>> OPERATOR: Good afternoon and thank you for all for standing by for the duration of today's conference all participants' lines are in a listen-only mode. Today's conference is being

recorded. If you have any objections, you'll disconnect at this time. It's my pleasure to introduce Monique Alcantara. Thank you, ma'am, you may begin.

>> Monique Alcantara: Thank you for the atmosphere 2019 CBCG annual report. I'll be joined with Niki Frazier who will be joined later today for a presentation. Today's purpose is to provide guidance over you and as a refresher for the OCS for today's report. The second part -- this is a two-part series. Last week we did the portion about creating and exporting your sport forms into XML and today we'll talk about all four mulling into OCS. This webinar is being recorded, and we will provide the Linklater this week. As well as the link to last week's presentation as well.

Briefly, I wanted to go over some guidance that we sent -- that we have provided in relation to the CBCG annual report. The first one is the CBCG "Dear Colleague" letter 2020-14 community level transformation module guidance. It provides a quick overview. It does confirm that fiscal year 202010 is a second quality year assurance year. It's a operational definition for community-level transformations as well as the defined four stages for the purposes of submitting into module 3 and provides a revised state checklist.

I briefly want to reminded they will be --

(Inaudible.)

>> Monique Alcantara: OCS at this time.

The next communication that we released was DCL2020-17 CBCG annual report OMB approval and updated timeline. We released this on April 30th, 2020.

This focused -- does confirm that the OMB approval was received on February 28th, and this -- the second version of the CBCG version 2 will expire on February 28th, 2023 and that we will continue to use the original version of module 1 given the short timeframe, and we want to be able to provide you more training and technical assistance. And due to the increased activity, it does relate to the CARES Act.

The CCL does provide information about the smart forms release. Most should have received their smartforms if you have not please email me or Niki Frazier.

This week we will release AT2020-04 submission of fiscal year 2019 CBCG annual report it's of the fiscal year 2019 eligible entities, continued quality assurance of module 3, the federal review of annual report as well as provide links to these webinars this one and the one we did last week.

I briefly do want to state for the purposes of fiscal year 2019 CBCG annual report we will be using the list of eligible incident si in your fiscal year 2019 plan not the ones that are in your current master list.

If you have any current questions that it was not included in your state plan, again please reach out to me, Niki or your

program specialist, and we will walk that through to you.

Today's focus we will provide a timeline as well as the OLDC refresher for anyone who's new, this won't be a refresher. It will be new information, and we'll focus on how to submit module 1 followed by how to submit module 3 and how to submit modules 2 and 4.

All four modules are currently available within OCS, which is July 17th, 2020 so OCS review will start on July 20th, 2020, and you should expect initial feedback is September 17th. We're saying everyone will receive feedback September 17th just that everybody will receive feedback -- and it will align with our federal accountability measure.

Now, we will start discussing OLDC, and we will start with OLDC accounts.

OLDC allows secure submissions as well as permits different rules for submission functions. There are 3 functions that we assign to users within OLDC that is data entry, which only allows for a user to create, edit and enter data. The grant administrator, which is able to do everything that the data entry person is able to do as well as submitting and unsubmitting and the authorized official, now the authorized official is only able to review and certify but annual reports do not need to be certified so, therefore, authorized officials do not need -- you do not need any users assigned as an authorized official for specifically for the annual report.

If you have questions about your user role, please contact myself and Niki.

OLDC accounts -- so we do mandate that each individual have a separate account. This does mean that you should not provide your password to anyone, any user name. You should only provide -- you should only enter data hearse if someone else needs an account, you should create an account for them. We recommend that each state does have one user role for the official role that's not part of the official report.

If you have another OLDC account for another program -- so again, please contact me or Niki. And like I mentioned if you want to verify that you have an account or your role, please email Niki Frazier and myself, and we will provide you a form for any new users.

For new users, you will receive a user name and password via two emails. This -- these emails will come from notifications@GrantSolutions.gov. You can contact support if you did not receive either email. You can also contact me and Niki, and we have provided information to contact support above.

You should only contact GrantSolutions for support if you do not receive these emails. For resetting passwords and things of that nature we'll discuss on the next slide.

Now, we'll discuss accessing OLDC. OLDC is accessed through GrantSolutions at grantsolutions.gov. It's accessible through Chrome, Firefox and internet explorer. We do is suggest

Chrome that Chrome also all the different capabilities that GrantSolutions has, but you're able to access it through Firefox and Internet Explorer. We suggest saving GrantSolutions.gov as a favorite.

And we'll switch to a live demo and walking through a live process of submitting the annual report.

While Niki is pulling it up, yes, we will share the presentation with attendees. It will be included in this week's action transmittal. Okay.

So we are now at the GrantSolutions home page, and we will click, log in. And once you click login, you'll enter your user name and password. Prior to doing that, I will say since we are federal, and we have to used our PIV card, but I did want to mention there's a link if you have trouble logging in so if you have any issues like you forgot your user name, you forgot your password or it's saying that your password does not work

Niki, and I are able to reset our password, but if we do it then you'll have to use the password that you receive rather than creating your own password, so we do suggest first click this link, having trouble logging in, and then it'll walk you through the process of resetting a password and Niki will quickly log in using her PIV card.

And this will bring us to the GrantSolutions portal. We do have a different user type so our window might look slightly different than ours, but you will click OLDC from the menu bar.

Very quickly as a reminder there are -- this is the OLDC home page. We do say your view might be different, and we do suggest that you switch the home page enhance by hitting this button that Niki is hitting, and then clicking yes, so that it always takes you to this page. That only happens the first time you log in. Once you click that, switch the home page enhance, it should remain that way.

As a quick overview of the OLDC home we have three tabs available for you but today we're only going to focus on two. The first is my recent activity. You don't see this on your screen, but it is included in the password that we will share that all forms recently accessed by a user and by recently accessed that means reports that you are currently working on.

An activity report, you're able to search for initialize, submitted and external forms, so possible actions from this screen includes viewing under the little action tab. Yeah, includes viewing which allows to you view a form and read only mode that means you want to look at it and make an edit you click from this area and edit which you cannot do from this screen if the form is submitted, but it allows to you access a report action screen which we'll show you later on in the demo and finally you can do report status which allows to go to the report status page.

Niki, go ahead and report on that. The report form data page where you'll unsubmit or review your data support from this area because of the user that we're in, we're -- we don't want to demonstrate that anyway, but this is what the report form status looks like.

Niki, if you go back to OLDC home.

So now we're actually going to go into submitting module 1 while we're he'll tau auto-population, pre-populations, attachments and skip logic, so Niki is going to go to the program name which allows form selection screen, and you'll click community services block grant, and then your state. We are going to do Alaska for today's demo. We will delete everything that we do today. We're not actually going to do this as data entry but just use it as a way to short.

Under report name you'll pick annual module 1, and you'll go to the reporting period for the purposes of 2019, which is October 2018 to September 31st 2019, and then you'll click the plus sign which allows to you initialize a new report.

This then brings you to the report section home page. From here you can edit all sections.

Niki, if you go under the perform action you'll see three actions one is to clear selection data, one is data all data for that section and do not do that. Edit section opens the form section in a data entry version which U.S. look you to actually edit the document. Excuse me, and print section opens a new browser window with a report in a print-friendly version you're able to print from this area -- you'll only would print that one section but at the top of the screen you're able to report the full report, which will allow to you print the entire module, not the entire module report.

So Niki, if we can go into Section A, so Niki is going to click edit section, and then click go, and this will take her to Section A and let's scroll down to A.1D where I'm going to discuss this, so about 150. 8.1D as you'll see has a --

Niki, can you Zoom in a little bit, so we can focus in on 8.1. There you go. 8.1D has a blank text build, as you can see, and Niki can start typing into it and here is where we narrative, which is about 50 characters to I would say 3,000. For this field we would not, and we can't 3,000 we just need -- we don't need 3,000. We just need the authorized field's name, and then if we scroll down to 8.1D -- I'm sorry, scroll up.

(Laugh.)

>> Monique Alcantara: You will see here we have circular buttons, which are referred to as radio buttons, and this allows for a singular response, so once Niki clicks one -- sorry, it's selected you cannot unselect but if you need to change your response just select another option. When you click other like describe, and we'll go into this a little bit more it brings up a text box, which means you're all set to provide text information.

Next, we will scroll down to 8.2, which is check boxes. These differ from the radio buttons because they allow for multiple responses, which means you can select as many as required or as many as applicable, and if you need to unselect one, then unselect it. A text box may appear, which means that will allow to you provide additional information. Next we will scroll over to Section D. There's two ways to get to the other section, which is by hitting next section at the bottom of the screen, which we're not going to do that right now or scroll back to the top, the very, very top of the screen, and at the top, you'll see where it says report sections of the dropdown at the very top will understand part of your screen, and then you can select the section where you want to, and this allows you to jump from section to section rather than going from one section to the next, and so we're going to go to Section D. And here I am going to show you some pre-populations, auto-populations as well as auto-populations.

So we will scroll down to D.2. And here you can see fiscal year, which is already is filled out. That is a preauto-population that's created once you have created -- once you have initialized your form.

The next one is a blue text field that is read only, and it's auto-populated -- prepopulated from the GrantSolutions state plan, so GrantSolutions is data that we pulled from the CBCG state plan, and it's based on a response that you've already completed within the annual report.

For the pre-population and the auto-population, some of them will allow to you edit or not edit, so if it's a blue background, that means it's read only, and you're not able to edit. If it's a white background, it does mean you can edit it.

So next we are going to quickly talk about auto-populations throughout the forms but primarily Section s D and E we auto-populate sections and totals for you, and we're actually going to display how the auto-population works when you are completing data.

So, Niki, if you can go into number of entities assessed and enter No. 10 even though Alaska does not have 10 entities and in the next field, enter 9 just to show a difference, and then hit validate at the top of the screen.

When you hit validate, which we'll discuss this a little bit more it is going to show all the errors, so we suggest not hitting validate until you're actually ready until you completed a full section, but for purposes of this demonstration we're hitting validate early, scroll back down, and so now you can see under actual percentage meaning all 100 percent, it has auto-populating your meeting 100 percent. Also, right under it you see number of entities assessed it completed it based on what you submitted in the top field.

So once you filled it out once you don't have to fill it out again because if you assess 10, entities, you assessed 10 entities.

Once you fill out these other 3 data entry fields they'll auto-populate those entries as well.

Ones we'll go briefly over to attachment so Niki if you can take us over to Section G.

Okay. So now we're in Section G for the purposes of module 1, we only accept cell attachments so even though you see view add attachments at the top we suggest you only use this button if you want to view the attachments on the screen which we'll discuss a little bit later but for the purposes of module 1 we only accept cell attachments. You'll know whether or not you're able to apply -- attach a cell attachment based on the question so go to G.1A, you'll see a text field and on the right-hand side, you'll see G.1A and a paper clip. That means we'll accept an attachment for that question. Our preference is where you're able to please provide a narrative or font but if not, if you need a little bit more than the characters allowed, I believe for this question it is 3,000 questions -- I mean, 3,000 characters, and then you would click the paper clip, and you will see the tab is highlighted, cell level attachment. You will click choose file. Attach a document which we'll just attach a random document at this point, and then click attached file so upload, you'll get a pop-up message saying once they've done -- once they've completed a virus check, the upload will be complete. We hit okay, and then the attachment will appear under the field location. It also tells you what question the attachment is related to, the file name and the uploaded date. And the upload status so again, once it's done that will changed to attached or completed, and you can also see who attached it.

We do ask for your file name that you at a minimum include the question number that attachment is related to. And if you click that red X, it will delete the attachment.

One thing I'll mention very quickly, too, that attachments do not transfer over from your estate plan so if you did -- if it's a question that correlates directly to the state planning, you attach a document there, and that attachment won't carry over.

Next we'll go directly to the home page and go back -- the tech report section home page, sorry. To do that you click at the top and hit go to report section and that'll bring you back to the home page. Once you're done filling all the sections here we won't be able to do that here but as you can see the sections are saved with errors. A submit button next to the validate button, and then you'll be able to hit submit here. Again, you do not need to certify, but you're only able to submit once all sections shows phase validated as it does in Section C. And that is the quick overview of submitting module 4.

Niki, let's go to the report form and delete this report.

Now we're back at the form selection screen. If you're starting from the scratch you'll see from the OLDC home page we're going to discuss module 3 next. If you're at the OLDC home page you'll click report form back here but because you're coming -- because you were coming from the OLDC report section it always brings you back to form selection so Niki you'll fill out this form again, and this time she will pick module 3, and then she will scroll to the appropriate reporting period so for each module you have to pick the federal fiscal year as your reporting year but for modules 2, 3 and 4 which we'll discuss a little bit later it's based on the reporting period so go ahead and hit the plus sign, which will initialize the module 3 perform. Module 3 only allows for attachments, so the decisive between attaching in module 3 -- sorry, let me back up just a little bit. This is just standard language. You do not have to fill out this form. It comes from your SRS24F. It's all read only but for this purpose we're only suing module 3 attachment. As I was saying the difference between attaching in module 1 and attaching to module 3, that module 3 we're going to do form-level attachment so Niki will click view attachments, and it's highlighted form level attachments, so you're not going to be able to do any form level attachments, and you will patch each module 3 submission one at a time.

So we know that you guys have been asking for us to allow to do multiple attachments at once we have GrantSolutions and who they are, but that will not be available this year, so you have to submit each attachment one at a time. Once you are done you'll hit close at the bottom of the screen or the X in the top right-hand corner. Either one, and then you will click validate. For module 3 there are no records so as soon as you click validate it, and then you're able to hit submit and once you hit submit it will take you to the report status screen.

Go ahead and hit it, Niki, and then it'll tell you the report has been submitted, and you can click okay. We will go back it off delete it so Alaska if you have any module 3 you can.

For module 3 we ask that you include the fiscal year, the state abbreviation, module 3, OLDC name, the DUNS number, which is the attachment and the total number of module 3 submissions. This is included in the module 3 manual as well as presentation sample that we will be releasing, so you'll have a presentation sample.

And with that we'll go back to OLDC home we'll discuss modules 23 and 4. You must create the smart forms or if you have a data -- you'll be training the XMLs from your state system, but I would refer to last week's presentation and make sure that prior to getting to this screen, you do review all the errors and warnings and the and convert it to the XML under the excess warnings and tabs, and then you will export -- upload that XML into OLDC, so in order to do that from the OLDC home page you will click upload data upload. You will select your program name, which will be CBCG. This is only accessible for the CBCG, so it's the only program you'll select. You'll select your state. Yeah, select the correct module. You're only able to do one module at a time, but the appropriate reporting period, and then we will drag and drop, and I believe that we might have some test files, but I believe they will not work, but we'll show you very quick what the drag and drop looks like.

Doing the upload, you are able to do multiple documents at once. If you have 10 entities you can select all 10 at once. Is if you on him have only have one -- these are not going to work because these are not geared for Alaska in the state as well. Upload in progress, and then it'll say successfully uploaded, so if it says successfully uploaded that means it's the correct file type.

Niki, go ahead and click okay.

You can then click on my upload status to actually see the status of the report. Sometimes it takes a little bit time to upload. Sometimes you'll see three optionals it will say pending, saved or failed.

Saved means that you are now ready to submit the module once all of your submissions have saved, and we do have screenshots, and we do have a PDF guide, and we do have all of this available for you. Failed means it does not work. If you see failed in the upload status, please contact me and Niki, and we will -- and send us the smart form if you're using smart forms as well as the XMT. Right now it's showing pending, but they'll eventually show failed and if they show failed please send the XML to me or Niki, and we'll review it to see why it is failing.

And then you -- once it has successfully passed, which we won't have any of that, you will go back to the OLDC home page, and then from here you'll go to a report form entry.

Niki, let's go to Alaska for 2018 as soon as those are submitted, and see if we can get to that.

So once they are loaded successfully you'll see it's submitted for each rural Alaska and once you submitted them all eligible entities will show here, and it shows all submitted reports are shown for all, and then you would submit the report. Again, we do have this displayed in our tool guide that we will also include in tomorrow's action transmittal, but that is a quick refresher about how to submit modules 1 through 4 within OLDC.

And with that I will -- we will go back to the slide show.

So just some final tips and a quick overview. We do have action buttons. The action buttons are the same for all four modules, but they really most pertain to modules 1 and 3. The previous section returns you to a previous section. Save any change you have made so far. View/add attachments to open attachment window to view all attachment. OCS only accepts cell attachments from module 1. You can see Slide 30 for this, and we do not use this view add attachment button to attach a document to module 1.

Validate, checks errors throughout the report. This is more specific for module 1, and module 3. You do modules 2, 3 and 4 will not have errors so once you click validate, it'll allow you to submit, and next section moves you to the next section.

Again, a reminder, each module must be submitted separately. The annual report does not require certification. Module 1 is based on the federal fiscal year October 1st, 2018 through September 30th, 2019, and you submit your work based on work completed during federal fiscal year 2018 with federal fiscal year 2018 funds. Modules 2-through a 4 is based on the state reporting period and, so you submit work based and funds spent during that time.

Here are the CBCG federal contacts. If you have any programmatic questions, please contact your program specialist. We have Aimee Bellman, Isaac Davis and Jamia Furbush any technical questions and OLDC access concerns contact me Monique Alcantara and Niki Frazier. We ask all emails copies at CBCGstates@ACF.gov for proper response and with that we'll go to questions. We ask if you have any questions, please add them to the chat box. Niki will read the questions as they come in, and I will answer them.

Niki, you might be muted.

>> Niki Frazier: I wasn't muted. I was reading. Hi, everyone. I'm Niki Frazier. Only feedback on certain modules IE module 1.

>> Monique Alcantara: Our goal is to provide initial feedback for all four modules by September 17th. As we're reviewing, we'll provide you any updates or any change of dates, but that means that any initial comments you have -- an initial feedback really does mean this is our first time sending you a an email or a review memo about your annual report, so, you know, once we send the review memo that can go back and forth a little bit. Our goal is to submit feedback for all four modules by that date.

>> Niki Frazier: Cassandra asked if a presentation will be shared with all attendees.

>> Monique Alcantara: Yes the presentation as well as this webinar and links to the webinar will be shared with the action transmittal that will be released this week. In this case and Tasia I believe she's from a CAP, and she ask to repeat the contact email to permissions on GrantSolutions.

(Talking Simultaneously.)

>> Monique Alcantara: Okay -- so to update users in permissions on GrantSolutions you'll actually contact me and Niki and my email is Melania.alcantara@acf.hhs.gov and Niki's email is nikita.frazierer@acf.hhs.gov.

>> Niki Frazier: There were several comments about sound.

>> Monique Alcantara: Okay.

>> Niki Frazier: But that should be cleared up with the recording. I could hear clearly throughout out a connection between the audio and the user.

Do you want the attachment --

>> Monique Alcantara: So if you are able to provide just the narrative, please provide just the narrative. Whatever you have to do the attachment then just provide the attachment. We don't need it in both so just one or the other.

>> Niki Frazier: If our state is not submitting any module 3 forms this year, what do we need to do?

>> Monique Alcantara: I would just send a quick email to your program specialist you do not have to do anything with them with the OLDC. We only ask you email your program specialist, so that we just have it on record, so I don't contact you after the fact to see -- to just verify. That way we can just keep accurate records ahead of time.

>> Niki Frazier: And Priscilla would want to know what would you attach to module 3?

>> Monique Alcantara: Module 3 smart forms, so that's what you would be attaching to module 3 is the smart form for each eligible entity. Again, if you haven't received any smart forms please contact myself or Niki, and you can contact Katie, and we can work to get that information to you.

>> Niki Frazier: Tasia asked again have there been any changes to submitting the AM report?

>> Monique Alcantara: No, so there haven't been any

>> Which is annual report after feedback and responses have been sent?

>> Monique Alcantara: So after the federal review process is complete, you will see -- receive an email approval from your program specialist. I believe that answers that question but feel free to elaborate if I didn't answer it fully.

>> Niki Frazier: Priscilla ask will you update or change the printed version of a report. Sometimes it looked like a run-on sentence.

>> Monique Alcantara: Priscilla that's something we received feedback about, and we have been working at GrantSolutions on updating that. That is something that has to come from them, so we have been made aware with all the printing issues, and we have been asking them to make it a priority. I cannot guarantee that will be done this year, but we will continue working with them and requesting that they to make this -- make the printing a better option.

>> Niki Frazier: Lisa and Priscilla, how said you answered it sufficiently.

>> Monique Alcantara: That's the last question I see. We'll give a minute for anyone else to answer the question. While we're waiting for that, I will go back to the federal staff contact in case you need to write down these emails. Again, we will have all these available to you guys this week including

and get all your feedback and hopefully the audio isn't muffled in the recording.

Okay. I don't see any more questions coming in or anyone typing, so I think with that, we can go ahead and end this presentation. We thank you again for joining. We really appreciate it, and we look forward to having a great submission season, and we hope everyone is doing well and staying safe. Thank you.

>> Niki Frazier: Thanks, everyone.

>> OPERATOR: And this concludes today's conference. Thank you for participating. You may disconnect at this time.