

Submitting the New AFI PPR Long-Form

July 2016

Agenda

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Changing Reports and Online Systems

- AFI postponed the collection of fiscal year (FY) 2015 AFI grant data as we were seeking approval from the Office of Management and Budget (OMB) for the [proposed new AFI PPR](#).
- Pending OMB approval, **AFI will collect FY 2015 data this summer using the new annual Long-Form PPR**. The new AFI PPR will consist of:
 - A **Long Form** to collect annual data (similar to Data Reports in past year)
 - A **Short Form** to collect quarterly data
- The new PPR will be submitted through the Online Data Collection (OLDC) system

Initial Submission of New PPR

- Pending OMB approval, **AFI will collect FY 2015 data this summer using the new annual Long-Form PPR** in the On-Line Data Collection (OLDC) system.
- Similar to past years, Data Contacts assigned to each grantee will provide direct support to grantees with this reporting process.

Initial Submission of New PPR

- The AFI Resource Center will be in touch with all grantees regarding deadlines and training resources for this new annual reporting process.
- Please note that we have worked to identify the data items in the AFI PPR that grantees were not previously required to report, and these items will be optional for the FY 2015 data collection.

The Online Data Collection (OLDC) System

- The new PPR will be submitted online in OLDC, an HHS reporting system also used by LIHEAP, CSBG, CED, and more.
- OLDC requires each staff working on the report to have a user name and password. AFI will be issuing login information closer to the reporting period. For grantees who already confirmed their point of contact at the end of May, thank you, that will expedite setting up your OLDC accounts.
 - The AFI Resource Center will be reaching out directly to those grantee who did not confirm a point of contact.
- **For more information:** Later this summer, AFI will post a webinar and training resources about OLDC to the AFI Resource Center. Grantee will receive emails when those materials are posted.

A Look at the New PPR Long Form

To see the [complete PPR Long](#), to the AFI Resource Center under Managing Your AFI Grant, Proposed New PPR

Sections

- Cover Page
- A – Project Information and Administration
- B – IDA Design
- C – AFI IDA Holder Account Activity
- D – Training, Services, and Assistance Offered to AFI IDA Holders
- E – AFI IDA Holder Demographics at the Time of Enrollment
- F – AFI IDA Holder Demographics at the Time of Final Matched Withdrawal

Working with New Fields

- The AFI PPR includes some new data fields that were not previously reported by AFI grantees. The collection of these fields will be phased in, since the first AFI PPRs collected will cover periods of time that have already passed.
- These fields will be optional through the annual PPR long form for FY 2017 (due November 30, 2017) and required beginning with the FY 2018 Quarter 1 PPR short form (due January 30, 2018).
- Over the next year, we expect grantees to begin collecting and reporting these fields, and we have created resources to help you make any needed adjustments to the forms and data systems for your AFI project(s).

PPR Resources

Posted on AFI Resource Center > Managing Your AFI Grant

- PPR overview page
- This webinar!
- Excel Data Tracking Tools
 - *Participant Version*
 - *Partner Version*
- Lists of new report fields, and fields no longer collected
- Checklist of where to make changes in your AFI Project to reflect new report
- OLDC webinar (*coming soon*)
- How to Navigate OLDC page (*coming soon*)

PPR Resource – Excel Data Tracking Tools

With the creation of the AFI PPR, ReportAssist is no longer available.

AFI created two data tracking tools, each set up to correspond with the AFI PPR Long-Form and Short-Form. These are optional tools provided by AFI; use of these tools *is not mandatory*.

- *Participant Version*
 - Data is entered for each participant, the Excel file is set up with formulas to roll-up cumulative numbers
- *Partner Version*
 - Works in conjunction with the Participant version. Grantees can share the participant version with partners who independently open and administer AFI IDAs, then collect those versions and copy data into fields in the Partner version, which will roll-up cumulative numbers.

The tools and best practices for using them are available on the [AFI Resource Center website](#).

PPR Resource – Excel Data Tracking Tools

Tab	Form	When to fill out
Welcome		
How-To		
Participants	<i>Populates other tabs</i>	This tab allows you to maintain the list of individual participants in your AFI project. Fill this out at the beginning of project and add to it as new individuals join. <i>Please follow your organization's guidelines on how to protect personal identify information.</i>
A - Project Info	Long Form	Much of this information can be entered at the beginning of your project, and will only need to be updated if there are changes to your project.
B - IDA Design	Long Form	Much of this information can be entered at the beginning of your project, and will only need to be updated if there are changes to your project.
C - IDA Activity	Long Form	This tab allows you to enter data at the participant level. As you enroll new participants and as they make progress saving in their IDAs, update this tab, which includes numbers on the individuals who applied, opened accounts, and made asset purchases; and their savings amounts.
D - Training, Services	Long Form	Much of this information can be entered at the beginning of your project, but the number of participants who received each training or service will need to be updated throughout the project.
Sections E & F - Your Data	<i>Populates other tabs</i>	This tab creates an easier way to track demographic data by participants for Sections E and F. As you enroll new participants and as they make asset purchases, you will need to update this tab; doing so will automatically update the tabs 'E - Demographics at Enrollment' and 'F - Demographics at Withdrawal.'
E - Demographics at Enrollment	Long Form	This tab is not editable; all updates should be made in the tab 'Sections E & F - Your Data'
F - Demographics at Withdrawal	Long Form	This tab is not editable; all updates should be made in the tab 'Sections E & F - Your Data'
PPR Short Form	Short Form	This tab is not editable; it is populated from Long Form tabs.

Welcome / How-To / Participants / A - Project Info / B - IDA Design / C - IDA Activity / D - Training, Services / Sections E & F - Your Data / E - Demographics at Enrollment / F - Demogr

PPR Short-Form

- Submitted quarterly in OLDC
- Collects data on 10 fields (from the Long-Form)
 1. Total number of AFI IDAs opened
 2. Current total number of AFI IDAs open
 3. Total amount of AFI IDA holder savings deposits in AFI IDAs
 4. Current total amount of AFI IDA holder savings balances in AFI IDAs
 5. Total number of AFI IDA holders who made a matched withdrawal (MW)
 6. Total amount of AFI IDA holder savings withdrawn from an AIF IDA for a MW
 7. Total amount of federal AFI grant funds disbursed as matching funds for MWs
 8. Total amount of non-federal cash disbursed as matching funds for MWs
 9. Total number of AFI IDA holders who exited this project without a MW
 10. Total amount of AFI IDA holder savings withdrawn/re-assigned due to project exit for any reason without a MW

Into the Future

PPR Long Form for FY 2016 Data

- Pending approval, reports open mid-October, due November 30 (closer to how timing of annual Data Reports in the past)

PPR Short Form for Quarterly Data

- First will be due on January 30th, 2017, for the reporting period of October 1st, 2016 through December 31st, 2016.

SF-425's

- Continue to submit every six months in GrantSolutions
 - Due each April 30, and October 30

If You Have Questions...

- For questions related to completing the PPR Long-Form, call or email your AFI Data Contact directly or through the AFI Resource Center:

Hours of Operation:

Monday – Friday, 9:00 a.m. to 5:00 p.m. EST

Email: info@idaresources.org

Phone: 1-866-778-6037

- For questions related to your AFI project, please contact your AFI Program Specialist.