

# Editing Specific AFI PPR Sections

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See the [AFI PPR Overview](#) page for details about reporting data from FY 2015 and beyond.

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## Report-wide tips and navigation

This report is for **cumulative data**.

Unless noted, all data in the report is cumulative from the start of the grant through the end of the reporting period for the report.

### Navigation Buttons – on main Report Section screen



View/Add Attachments	Click to view any attachments you have added.
Validate	Click to verify if the data you entered satisfy rules in the form. All sections will need to be validated before you can submit the form.
Print Full Report	Click to print or save a version of the report for your records.

### Section Status – on main Report Section screen

Section Status:		
<b>Saved -- Validated</b>	Saved	The section is saved, but not yet validated.
<b>Saved -- Validated</b>	Saved -- Validated	The section is validated and has no errors.
<b>Saved -- Validated</b>	Validated -- with Warnings	The section is saved and validated and there are some warnings. However, these warnings are allowable and the report may still be submitted.
<b>Saved</b>	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.
<b>Saved -- Validated</b>		
<b>Saved -- with Errors</b>		
<b>Validated - with Warnings</b>		

### Navigation Buttons – on section screens

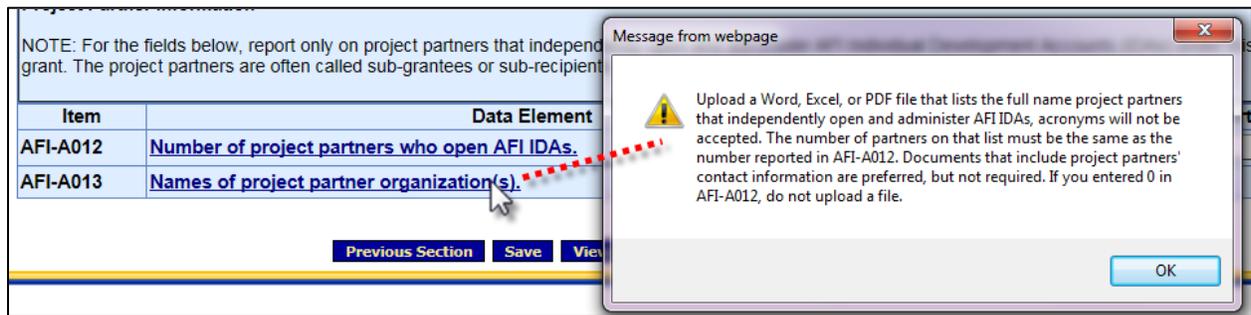
Report navigation buttons are listed across the top and bottom of each report screen.



Previous Section	Moves you to the previous section of the report. <i>Save first.</i>
Save	<b>Click to save. Save your report often to prevent losing data!</b>
View/Add Attachments	Brings you to a screen showing any attachments you added to the report. <i>Save first.</i>
Validate	Click to verify if the data you entered satisfies rules in the form. All sections will need to be validated before you can submit the form.
Next Section	Moves you to the next section of the report. <i>Save first.</i>

### Field Instructions

For field instructions, click on the field name to see a pop-up with instructions.



### Prior Year's Data

The PPR is set to show your prior year's report data in a column to the left of where you will enter your current report data.

- If you reported in FY 2014, the FY 2015 PPR Long Form "Prior Report Data" fields will be pre-populated with key data points from your 2014 report.
- Going forward, if you completed a prior year's PPR Long Form for a grant, all "Prior Report Data" fields will be populated. This data will not be editable, but can be used as reference to help ensure current report data is accurate.

Matched Withdrawals for First-Home Purchase			
Item	Data Element	Prior Report Data	Current Report Data
AFI-C014	<a href="#">Does this project allow the use of AFI IDA savings for first-home purchase?</a>	<input type="radio"/> Y <input type="radio"/> N	<input checked="" type="radio"/> Y <input type="radio"/> N
AFI-C015	<a href="#">Total number of AFI IDA holders who made a matched withdrawal for first-home purchase.</a>	<input type="text" value="0"/>	<input type="text" value="10"/>
AFI-C016	<a href="#">Total amount of AFI IDA holder savings withdrawn for first-home purchase.</a>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
AFI-C017	<a href="#">Total amount of federal AFI grant funds disbursed as matching funds for first-home purchase withdrawals.</a>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
AFI-C018	<a href="#">Total amount of non-federal cash disbursed as matching funds for first-home purchase withdrawals.</a>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>



## Section A – Project Information and Administration

### A006

Create an additional A006 row for *each* source of non-federal cash (A006 1, A006 2, , etc.). To do so:

1. In the dropdown, select the number of rows you want to add at a time.
2. Click “Add”

If you need to delete a row:

1. Check the box at the right of the row
2. Click “Delete Marked Rows”

	Source	Non-Federal Cash Source Type	Amount of Funds Committed	
AFI-A006 1	Really Great CDC	Grantee organization	\$25,000.00	<input type="checkbox"/>
AFI-A006 2	State of Wyoming	State legislative entity	\$10,000.00	<input checked="" type="checkbox"/>

Add Section A - ANOTHER NON-FEDERAL CASH SOURCE 1

### A012 and A013

If you entered in field A012 that you had at least one project partner that independently opens and administers AFI IDAs, upload a Word, Excel, or PDF in A013 that lists the *full names* of each project partner; *acronyms will not be accepted*. Documents that include project partners’ contact information are preferred, but not required.

If you entered a zero in field A012, do not upload a file in field A013.

AFI-A012	<u>Number of project partners who open AFI IDAs.</u>	0	2
AFI-A013	<u>Names of project partner organization(s).</u>		

## Section B – Individual Development Account Design

Fill out **one** Section B:

- If your organization only offers one AFI asset type
- If your organization offers more than one AFI asset type, but the match rate, matched amount, savings period, and all Section B fields are *exactly* the same for each asset type.

Fill out **more than one** Section B:

- If your organization offers more than one AFI asset type, and at least one of the Section B fields (the match rate, matched amount, savings period, etc.) are *different* between asset types.

### If applicable, how to create more than one Section B

Each section B has 16 questions. After the 16<sup>th</sup> question, you will be asked “Add another asset type?” If you have another asset type, select the button for “Y” [Yes] and another section with the same 16 questions will appear just below as type B, C, D, etc. Repeat as needed.

AFI-B016a	Maximum number of missed deposits.	<input type="text"/>
Add another asset type? (Only necessary if any of the above fields are not the same for a different asset type.)		<input checked="" type="radio"/> Y <input type="radio"/> N
Individual Development Account Design Type B		
Item	Data Element	
AFI-B001b	What qualified expenses (i.e., asset types) are allowed for this IDA design type?	<input type="checkbox"/> First-home purchase <input type="checkbox"/> Postsecondary education or training <input type="checkbox"/> Business capitalization <input type="checkbox"/> ... of an IDA to a dependent or

## Sections C, D, E, and F

Section C – AFI IDA Holder Account Activity

Section D – Training, Services, and Assistance Offered for AFI IDA Holders

Section E – AFI IDA Holder Demographics at the Time of Enrollment

Section F – AFI IDA Holder Demographics at the Time of Final Matched Withdrawals

Enter cumulative data for the grant, from date of award through the end of the reporting period.

If you have project partners who independently open and administer AFI IDAs, their data must be included.

## Certifying, Submitting, and Revising the AFI PPR in OLDC

### Certify

After a report form has been successfully saved and validated, a user with the appropriate role<sup>1</sup> can certify the report with a digital signature by:

1. Click “Certify” on the Report Section screen.
2. The following message will appear: “Changes made after saving this form will be lost. You have the ability to sign in the signature are by pressing the “Click to Sign” button This will complete your Certify process and officially sign this form.”
3. Click “OK”
4. Click “Click to Sign.”

### 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. A user with the appropriate role can submit the report by taking the following steps:

1. Click “Submit” to officially send the report to the federal AFI program office in the Administration for Children and Families (ACF).
2. The following message will appear: “This will officially submit your report to ACF. Do you wish to continue.”
3. Click “OK”
4. The “Report Form Status” screen will appear along with the message “We have received your report. This page shows all reports we have received along with attachments.” Review this information to make sure it aligns with your expectations. Use the UnCertify button if you need to edit.
5. Click “OK”

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<sup>1</sup> Please contact the [AFI Resource Center](#) by email at [info@afiresources.org](mailto:info@afiresources.org) or by phone at 1-866-778-6037 if you are unable to certify, submit, or revise an AFI PPR.

## Revision

If it is necessary to make a change to your PPR after it has been approved by the federal AFI program office, you may submit a revision. The revision is duplicated from the original submission. The revision number is show in the information box in the Report Name. The original report is retained for historical purposes and may be accessed from the “Report Form Status” page.

1. Select “New / Edit / Revise Report” on the Grant & Report Period Selection screen.
2. The Report screen displays.
3. The report submission process is the same as for the original. The form must be saved, validated, certified, and submitted.