

# Proposed New AFI Program Performance Progress Report Forms

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We want your feedback on the proposed AFI PPR instruments. Your comments will help OCS improve the AFI PPR before implementing it as a requirement. OCS particularly invites you to comment on the content and organization of the proposed AFI PPR instruments and instructions. Please clearly reference your comments by section, question, or page number, as appropriate. We encourage you to include supportive comments as well as suggestions for improvement, so that we can get a balanced perspective on what works and what needs revision. We also welcome suggestions on the data collection process, particularly from those who are familiar with OLDC.

As is standard for PRA public comment requests, the Federal Register notice requests feedback on the following:

- a) Whether the proposed collection of information is necessary for the proper performance of the functions of the agency, including whether the information shall have practical utility;
- b) The accuracy of the agency’s estimate of the burden of the proposed collection of information
- c) The quality, utility, and clarity of the information to be collected; and
- d) Ways to minimize the burden of the collection of information on respondents, including through the use of automated collection techniques or other forms of information technology.

Submit your comments by emailing [infocollection@acf.hhs.gov](mailto:infocollection@acf.hhs.gov) with the subject line “Assets for Independence Program Performance Progress Report.” Please submit your comments as soon as possible, in order to expedite the clearance process. For more information, please visit <http://idaresources.acf.hhs.gov/AFIPPR>.

<i>Proposed AFI PPR Long Form</i> .....	2
Cover Page.....	2
AFI PPR-B – Contact Information and Project Scope.....	3
AFI PPR-C – Project Elements .....	4
AFI PPR-D – Account Activity.....	6
AFI PPR-E – Training, Services, and Assistance Offered .....	9
AFI PPR-F – Participant Demographics at the Time of Enrollment.....	12
AFI PPR-G – Participant Demographics at the Time of Asset Purchase.....	15
AFI PPR-H – Project and Participant Funds.....	16
<i>Proposed Instructions for AFI PPR Long Form</i> .....	17
Instructions for AFI PPR Cover Page.....	17
Instructions for AFI PPR Section B .....	18
Instructions for AFI PPR Section C .....	19
Instructions for AFI PPR Section D.....	21
Instructions for AFI PPR Section E .....	25
Instructions for AFI PPR Section F .....	29
Instructions for AFI PPR Section G.....	31
Instructions for AFI PPR Section H.....	32
<i>Proposed AFI PPR Short Form</i> .....	33
<i>Proposed Instructions for AFI PPR Short Form</i> .....	34

# Proposed AFI PPR Long Form

## Cover Page

[Link to PPR Long Form Instructions – Cover Page](#)

1. Federal Agency and Organization Element to Which Report is Submitted		2. Federal Grant or Other Identifying Number Assigned by Federal Agency		3a. DUNS Number	
				3b. EIN	
4. Recipient Organization (Name and complete address including zip code)				5. Recipient Identifying Number or Account Number	
6. Project/Grant Period Start Date: <i>(Month, Day, Year)</i>		End Date: <i>(Month, Day, Year)</i>		7. Reporting Period End Date <i>(Month, Day, Year)</i>	
				8. Final Report? <input type="checkbox"/> Yes <input type="checkbox"/> No	
				9. Report Frequency <input type="checkbox"/> Annual <input type="checkbox"/> Semi-annual <input type="checkbox"/> Quarterly <input type="checkbox"/> Other	
10. Performance Narrative					
<b>11. Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.</b>					
11a. Typed or Printed Name and Title of Authorized Certifying Official				11c. Telephone <i>(area code, number and extension)</i>	
				11d. Email Address	
11b. Signature of Authorized Certifying Official				11e. Date Report Submitted <i>(Month, Day, Year)</i>	
				12. Agency use only	

## AFI PPR-B – Contact Information and Project Scope

[Link to PPR Long Form Instructions – Section B](#)

AFI PPR Section B		
Contact Information and Project Scope		
Grantee Information		
Item	Data Element	
AFI-B001	Grantee Name	
AFI-B002	AFI Project Name	
AFI-B003	Organization Fax Number	Number: __ (____) ____ - ____ Ext. _____
AFI-B004	Organization Website	
Grantee Contacts		
Authorized Official		
AFI-B005	First Name	
AFI-B006	Last Name	
AFI-B007	Title	
AFI-B008	Direct Phone Number	Number: __ (____) ____ - ____ Ext. _____
AFI-B009	E-Mail Address	
Principal Investigator		
AFI-B010	First Name	
AFI-B011	Last Name	
AFI-B012	Title	
AFI-B013	Direct Phone Number	Number: __ (____) ____ - ____ Ext. _____
AFI-B014	E-Mail Address	
Project Scope		
Item	Data Element	
AFI-B015	Geographic Service Area	
AFI-B016	Service Area Type	
AFI-B017	Service Area Poverty Rate	
AFI-B018	Service Area Unemployment Rate	
AFI-B019	Target Population	
AFI-B020 (a, b) Sources Of Non-Federal Funding Match		
Non-Fed Source Type		Amount of Funds
Project Partner Information		
AFI-B021	Number of project partners which independently open and administer AFI IDAs	
AFI-B022 (a,b,c,etc) Project Partner Contacts		
This section should be duplicated for each project partner which independently opens and administers AFI IDAs.		
Project Partner Organization Name		
Project Partner Organization Address 1		
Project Partner Organization Address 2		
Project Partner Organization City		
Project Partner Organization State		
Project Partner Organization Zip Code		
Project Partner Organization Phone		
Project Partner Contact First Name		
Project Partner Contact Last Name		
Project Partner Contact Title		
Project Partner Contact Direct Phone		Number: __ (____) ____ - ____ Ext. _____
Project Partner Contact E-Mail Address		

**AFI PPR-C – Project Elements**  
[Link to PPR Long Form Instructions – Section C](#)

AFI PPR Section C Project Elements		
<b>Allowed Asset Purchase Category - Business Capitalization</b>		
<b>Item</b>	<b>Data Element</b>	
AFI-C001	Business Capitalization Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C002	Match Rate	
AFI-C003	Maximum Savings Matched	
AFI-C004	Is there a Maximum Savings Period?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C005	Maximum Savings Period in months	
AFI-C006	Total Number of Asset Purchases Expected – Business Capitalization	
AFI-C007	Is there a Minimum Opening Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C008	Minimum Opening Deposit	
AFI-C009	Is there a deposit frequency requirement?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C010	Required Deposit Frequency	
AFI-C011	Is there a Minimum Regular Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C012	Minimum Regular Deposit	
AFI-C013	Lump Sum Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C014	If Applicable, Limitations on Lump Sums	
AFI-C015	Is there a Maximum Number Missed Deposits?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C016	Maximum Number Missed Deposits	
<b>Allowed Asset Purchase Category – First Home Purchase</b>		
AFI-C017	First Home Purchase Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C018	Match Rate	
AFI-C019	Maximum Savings Matched	
AFI-C020	Is there a Maximum Savings Period?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C021	Maximum Savings Period in months	
AFI-C022	Total Number of Asset Purchases Expected – First Home Purchase	
AFI-C023	Is there a Minimum Opening Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C024	Minimum Opening Deposit	
AFI-C025	Is there a deposit frequency requirement?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C026	Required Deposit Frequency	
AFI-C027	Is there a Minimum Regular Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C028	Minimum Regular Deposit	
AFI-C029	Lump Sum Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C030	If Applicable, Limitations on Lump Sums	
AFI-C031	Is there a Maximum Number Missed Deposits?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C032	Maximum Number Missed Deposits	
<b>Allowed Asset Purchase Category - Post-Secondary Education or Training</b>		
AFI-C033	Post-Secondary Education or Training Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C034	Match Rate	
AFI-C035	Maximum Savings Matched	
AFI-C036	Is there a Maximum Savings Period?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C037	Maximum Savings Period in months	
AFI-C038	Total Number of Asset Purchases Expected – Post-Secondary Education or Training	
AFI-C039	Is there a Minimum Opening Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C040	Minimum Opening Deposit	
AFI-C041	Is there a deposit frequency requirement?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C042	Required Deposit Frequency	
AFI-C043	Is there a Minimum Regular Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C044	Minimum Regular Deposit	
AFI-C045	Lump Sum Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N

AFI-C046	If Applicable, Limitations on Lump Sums	
AFI-C047	Is there a Maximum Number Missed Deposits?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C048	Maximum Number Missed Deposits	
<b>Allowed Asset Purchase Category - Transfer To Family Member For Eligible Asset Purchase</b>		
AFI-C049	Transfer to Family Member Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C050	Match Rate	
AFI-C051	Maximum Savings Matched	
AFI-C052	Is there a Maximum Savings Period?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C053	Maximum Savings Period in months	
AFI-C054	Total Number of Asset Purchases Expected – Transfer	
AFI-C055	Is there a Minimum Opening Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C056	Minimum Opening Deposit	
AFI-C057	Is there a deposit frequency requirement?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C058	Required Deposit Frequency	
AFI-C059	Is there a Minimum Regular Deposit?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C060	Minimum Regular Deposit	
AFI-C061	Lump Sum Allowed?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C062	If Applicable, Limitations on Lump Sums	
AFI-C063	Is there a Maximum Number Missed Deposits?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-C064	Maximum Number Missed Deposits	

**AFI PPR-D – Account Activity**  
[Link to PPR Long Form Instructions – Section D](#)

AFI PPR Section D Account Activity		
<b>Item</b>	<b>Data Element –AFI Grant Funds</b>	
AFI-D001	Amount of federal AFI award	
AFI-D002	Federal AFI award drawn down to date	
<b>Item</b>	<b>Data Element -Account Openings</b>	
AFI-D003	Total number individuals who applied for an AFI IDA	
AFI-D004	Total number applicants found eligible	
AFI-D005	Total number AFI IDAs opened from the date of award through the last day of this reporting period	
AFI-D006	Total number AFI IDAs currently open	
AFI-D007	Total amount AFI IDA savings deposits from date of award through the last day of this reporting period	
AFI-D008	Total balance amount in AFI IDAs open on last day of this reporting period	
AFI-D009	Total number AFI IDA holders who reached maximum federal match level	
AFI-D010	Optional: Number of people on the waiting list to open an AFI IDA because all available slots are full	
<b>Item</b>	<b>Data Element -Account Closings</b>	
AFI-D011	Total number AFI IDAs closed from date of award through the last day of this reporting period	
AFI-D012	Total number AFI IDAs closed in which participants withdrew savings and received match for asset purchases	
AFI-D013	Total number AFI IDAs closed due to voluntary withdrawal	
AFI-D014	Total number AFI IDAs closed due to termination by grantee	
AFI-D015	Total number AFI IDAs closed due to failure to replenish emergency withdrawal within 12 months	
<b>Item</b>	<b>Data Element -Matched Withdrawals</b>	
AFI-D016	Total number AFI IDA holders making withdrawals for asset purchase	
AFI-D017	Total number AFI IDA holders making withdrawals in multiple asset categories	
AFI-D018	Total amount of AFI IDA savings withdrawn from an AFI IDA for an asset purchase	
AFI-D019	Total amount of federal AFI grant funds disbursed as matching funds for an asset purchase	
AFI-D020	Total amount of non-federal cash disbursed as matching funds for an asset purchase	
<b>Item</b>	<b>Data Element -Matched Withdrawals For First Home Purchases</b>	
AFI-D021	Does this project allow use of AFI IDA savings to pay for authorized first home purchase expenses?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-D022	Total number AFI IDA holders who withdrew their AFI IDA savings for authorized first home purchase expenses	
AFI-D023	Total amount AFI IDA savings withdrawn for authorized first home purchase expenses (Do not include match funds.)	
AFI-D024	Total amount of federal AFI grant funds disbursed as matching funds for authorized first home purchase expenses	
AFI-D025	Total amount of non-federal cash disbursed as matching funds for authorized first home purchase expenses	

Item	Data Element -Matched Withdrawals For Business Capitalization	
AFI-D026	Does this project allow use of AFI IDA savings to pay for authorized business capitalization expenses?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-D027	Total number AFI IDA holders who withdrew their AFI IDA savings for authorized business capitalization expenses	
AFI-D028	Total amount AFI IDA savings withdrawn for authorized business capitalization expenses. (Do not include match funds.)	
AFI-D029	Total amount of federal AFI grant funds disbursed as matching funds for authorized business capitalization expenses	
AFI-D030	Total amount of non-federal cash disbursed as matching funds for authorized business capitalization expenses	
Item	Data Element -Matched Withdrawals For Post-Secondary Education or Training	
AFI-D031	Does this project allow use of AFI IDA savings to pay for authorized post-secondary education or training expenses?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-D032	Total number of AFI IDA holders who withdrew their AFI IDA savings for authorized post-secondary education or training expenses	
AFI-D033	Total amount of AFI IDA savings withdrawn for authorized post-secondary education or training expenses (Do not include match funds.)	
AFI-D034	Total amount of federal AFI grant funds disbursed as matching funds for authorized post-secondary education or training expenses	
AFI-D035	Total amount of non-federal cash contribution disbursed as matching funds for authorized post-secondary education or training expenses	
Item	Data Element -Matched Withdrawals For Transfers To AFI IDA Of Dependent Or Spouse	
AFI-D036	Does this project offer transfers to the AFI IDA of a dependent or spouse?	<input type="checkbox"/> Y <input type="checkbox"/> N
AFI-D037	Total number of AFI IDA holders who withdrew their AFI IDA savings for transfer to AFI IDA of a dependent or spouse	
AFI-D038	Total amount of AFI IDA savings withdrawn for transfer to AFI IDA of a dependent or spouse (Do not include match funds.)	
AFI-D039	Total amount of federal AFI grant funds disbursed as matching funds for transfer to AFI IDA of a dependent or spouse	
AFI-D040	Total amount of non-federal cash contribution disbursed as matching funds for transfer to AFI IDA of a dependent or spouse	
Item	Data Element -Unmatched Withdrawals	
AFI-D041	Total AFI IDA savings withdrawn with no match	
Item	Data Element -Unmatched Withdrawals -Emergency Withdrawals	
AFI-D042	Total number AFI IDA holders making withdrawals for emergency purposes defined by AFI legislation	
AFI-D043	Total number AFI IDA holders making withdrawals for expenses for medical care or necessary to obtain medical care, for the individual or a spouse or dependent of the individual	
AFI-D044	Total amount AFI IDA savings withdrawn for expenses for medical care or necessary to obtain medical care, for the individual or a spouse or dependent of the individual	
AFI-D045	Total number AFI IDA holders making withdrawals for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclosure on the mortgage for the principal residence of the individual	
AFI-D046	Total amount AFI IDA savings withdrawn for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclosure on the mortgage for the principal residence of the individual	
AFI-D047	Total number AFI IDA holders making withdrawals for payments necessary to enable the individual to meet necessary living expenses following loss of employment	
AFI-D048	Total amount AFI IDA savings withdrawn for payments necessary to enable the individual to meet necessary living expenses following loss of employment	

AFI-D049	Total amount AFI IDA savings deposited to replenish AFI IDAs after authorized emergency withdrawals	
<b>Item</b>	<b>Data Element -Other Unmatched Withdrawals – Other Program Withdrawal</b>	
AFI-D050	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting without making asset purchase	
AFI-D051	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting without making asset purchase	
AFI-D052	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder moved out of the of project area	
AFI-D053	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because the holder moved out of the project area	
AFI-D054	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder no longer wanted to make an asset purchase	
AFI-D055	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because the holder no longer wanted to make an asset purchase	
AFI-D056	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of a financial need not defined above	
AFI-D057	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of a financial need not defined above	
AFI-D058	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of death of the holder	
AFI-D059	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of death of the holder	
AFI-D060	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of other reason	
AFI-D061	List other reason(s) for why AFI IDA holders made unmatched withdrawals upon voluntarily exiting because of other reason	
AFI-D062	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of other reason	
<b>Item</b>	<b>Data Element -Other Unmatched Withdrawals –Termination by Grantee</b>	
AFI-D063	Total number AFI IDA holders who made unmatched withdrawals upon being terminated from the AFI project	
AFI-D064	Total AFI IDA savings withdrawn by AFI IDA holders terminated without asset purchase	

## AFI PPR-E – Training, Services, and Assistance Offered

[Link to PPR Long Form Instructions – Section E](#)

AFI PPR Section E		
Training, Services, and Assistance Offered		
AFI PPR-E –Training, Services And Assistance Offered AFI IDA Holders		
Item	Structured Planning Exercises For First Home Purchase	Response
AFI-E001	Does this project offer structured planning exercises for first home purchase?	Is this type of structured planning offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E002	Hours of structured planning for first home purchase required by project	
AFI-E003	How was structured planning exercises for first home purchase provided?	
AFI-E004	Total number of unique AFI IDA holders served with this service offering	
Item	Structured Planning Exercises For Business Capitalization	Response
AFI-E005	Does this project offer structured planning exercises for business capitalization?	Is this type of structured planning offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E006	Hours of structured planning for business capitalization required by project	
AFI-E007	How was structured planning exercises for business capitalization provided?	
AFI-E008	Total number of unique AFI IDA holders served with this service offering	
Item	Structured Planning Exercises For Post-Secondary Education or Training	Response
AFI-E009	Does this project offer structured planning exercises for post-secondary education or training?	Is this type of structured planning offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E010	Hours of structured planning for post-secondary education or training required by project	
AFI-E011	How was structured planning exercises for post-secondary education or training provided?	
AFI-E012	Total number of unique AFI IDA holders served with this service offering	
Item	Economic Literacy or Financial Education	Response
AFI-E013	Does this project offer economic literacy or financial education to AFI IDA holders?	Economic Literacy or Financial Education Offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E014	Economic literacy or financial education curriculum used	
AFI-E015	Hours of economic literacy or financial education required by project	
AFI-E016	How was economic literacy or financial education provided?	
AFI-E017	Total number of unique AFI IDA holders served with this service offering	
Item	Advanced Financial Education	Response
AFI-E018	Does this project offer advanced financial education to AFI IDA holders?	Advanced financial education offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E019	Hours of advanced financial education required by project	
AFI-E020	How was advanced financial education provided?	
AFI-E021	Total number of unique AFI IDA holders served with this service offering	
Item	Financial Counseling	Response
AFI-E022	Does this project offer financial counseling to AFI IDA holders?	Financial counseling offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E023	Hours of financial counseling required by project	
AFI-E024	How was financial counseling provided?	
AFI-E025	Total number of unique AFI IDA holders served with this service offering	
Item	Budgeting Assistance	Response
AFI-E026	Does this project offer budgeting assistance to AFI IDA holders?	Budgeting assistance offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E027	Hours of budgeting assistance required by project	
AFI-E028	How was budgeting assistance provided?	

AFI-E029	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Credit Counseling</b>	<b>Response</b>
AFI-E030	Does this project offer credit counseling to AFI IDA holders?	Credit counseling offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E031	Hours of credit counseling required by project	
AFI-E032	How was credit counseling provided?	
AFI-E033	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Cash Assistance</b>	<b>Response</b>
AFI-E034	Does this project offer cash assistance to AFI IDA holders?	Cash grant offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E035	How was cash assistance provided?	
AFI-E036	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Loans</b>	<b>Response</b>
AFI-E037	Does this project offer loans to AFI IDA holders?	Loans offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E038	How were loans provided?	
AFI-E039	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Peer Support</b>	<b>Response</b>
AFI-E040	Does this project offer peer support to AFI IDA holders?	Peer support Offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E041	Hours of peer support required by project	
AFI-E042	How was peer support provided?	
AFI-E043	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Mentoring</b>	<b>Response</b>
AFI-E044	Does this project offer mentoring services to AFI IDA holders?	Mentoring offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E045	Hours of mentoring required by project	
AFI-E046	How was mentoring provided?	
AFI-E047	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Case Management</b>	<b>Response</b>
AFI-E048	Does this project offer case management services to AFI IDA holders?	Case management offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E049	Hours of case management required by project	
AFI-E050	How was case management provided?	
AFI-E051	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Employment Support</b>	<b>Response</b>
AFI-E052	Does this project offer employment support to AFI IDA holders?	Employment support offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E053	Hours of employment support required by project	
AFI-E054	How was employment support provided?	
AFI-E055	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Child Care</b>	<b>Response</b>
AFI-E056	Does this project offer child care to AFI IDA holders?	Child care offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E057	How was child care provided?	
AFI-E058	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Transportation</b>	<b>Response</b>
AFI-E059	Does this project offer transportation to AFI IDA holders?	Transportation offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E060	How was transportation provided?	
AFI-E061	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Medical Treatment</b>	<b>Response</b>
AFI-E062	Does this project offer medical treatment to AFI IDA holders?	Medical offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E063	How was medical treatment provided?	

AFI-E064	Total number of unique AFI IDA holders served with this service offering	
<b>Item</b>	<b>Crisis Management</b>	<b>Response</b>
AFI-E065	Does this project offer crisis management to AFI IDA holders?	Crisis management offered? <input type="checkbox"/> Y <input type="checkbox"/> N
AFI-E066	How was crisis management provided?	
AFI-E067	Total number of unique AFI IDA holders served with this service offering	

**AFI PPR-F – Participant Demographics at the Time of Enrollment**

[Link to PPR Long Form Instructions – Section F](#)

AFI PPR Section F			
Participant Demographics at the Time of Enrollment			
Item	Data Element	A-All IDA Holders	B-IDA Holders Who Made Asset Purchase
AFI-F001 a, b	IDA Holder Gender – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Declined to ID
AFI-F002 a, b	IDA Holder Race – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	<input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Caucasian <input type="checkbox"/> Native American <input type="checkbox"/> Alaska native <input type="checkbox"/> Native Hawaiian <input type="checkbox"/> Other Pacific Islander <input type="checkbox"/> Multiracial <input type="checkbox"/> Other <input type="checkbox"/> Declined to ID	<input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Caucasian <input type="checkbox"/> Native American <input type="checkbox"/> Alaska native <input type="checkbox"/> Native Hawaiian <input type="checkbox"/> Other Pacific Islander <input type="checkbox"/> Multiracial <input type="checkbox"/> Other <input type="checkbox"/> Declined to ID
AFI-F003 a, b	IDA Holder Ethnicity – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	<input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Declined to ID
AFI-F004 a, b	IDA Holder Age – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	<input type="checkbox"/> 19 years and under <input type="checkbox"/> 20-29 years <input type="checkbox"/> 30-39 years <input type="checkbox"/> 40-49 years <input type="checkbox"/> 50 years and older <input type="checkbox"/> Declined to ID	<input type="checkbox"/> 19 years and under <input type="checkbox"/> 20-29 years <input type="checkbox"/> 30-39 years <input type="checkbox"/> 40-49 years <input type="checkbox"/> 50 years and older <input type="checkbox"/> Declined to ID
AFI-F005 a, b	Marital Status – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Single, never married <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Single, never married <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Declined to ID
AFI-F006 a, b	Educational Attainment – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Completed grades K-5 <input type="checkbox"/> Completed grades 6-8 <input type="checkbox"/> Completed grades 9-11 <input type="checkbox"/> High School Diploma <input type="checkbox"/> Vocational School Diploma/Degree <input type="checkbox"/> Some College <input type="checkbox"/> AA Degree/Graduated two-year college <input type="checkbox"/> BA/BS Degree/Graduated four-year college <input type="checkbox"/> Some Graduate School/Attended Graduate School <input type="checkbox"/> MA/MS, etc Graduate Degree <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Completed grades K-5 <input type="checkbox"/> Completed grades 6-8 <input type="checkbox"/> Completed grades 9-11 <input type="checkbox"/> High School Diploma <input type="checkbox"/> Vocational School Diploma/Degree <input type="checkbox"/> Some College <input type="checkbox"/> AA Degree/Graduated two-year college <input type="checkbox"/> BA/BS Degree/Graduated four-year college <input type="checkbox"/> Some Graduate School/Attended Graduate School <input type="checkbox"/> MA/MS, etc Graduate Degree <input type="checkbox"/> Declined to ID

AFI-F007 a, b	Employment – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Full Time Employed <input type="checkbox"/> Part Time Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Student <input type="checkbox"/> Retired <input type="checkbox"/> Other <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Full Time Employed <input type="checkbox"/> Part Time Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Student <input type="checkbox"/> Retired <input type="checkbox"/> Other <input type="checkbox"/> Declined to ID		
		Other Description: _____	Other Description: _____		
AFI-F008 a, b	Location – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Major Urban Area <input type="checkbox"/> Minor Urban Area <input type="checkbox"/> Rural/Remote Area <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Major Urban Area <input type="checkbox"/> Minor Urban Area <input type="checkbox"/> Rural/Remote Area <input type="checkbox"/> Declined to ID		
AFI-F009 a, b	Auto Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Owns an Automobile <input type="checkbox"/> Does Not Own an Automobile <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Owns an Automobile <input type="checkbox"/> Does Not Own an Automobile <input type="checkbox"/> Declined to ID		
AFI-F010 a, b	Home Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Owns a Home <input type="checkbox"/> Does Not Own a Home <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Owns a Home <input type="checkbox"/> Does Not Own a Home <input type="checkbox"/> Declined to ID		
AFI-F011 a, b	Business Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Owns a Business <input type="checkbox"/> Does Not Own a Business <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Owns a Business <input type="checkbox"/> Does Not Own a Business <input type="checkbox"/> Declined to ID		
AFI-F012 a, b	TANF Recipients – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Current TANF Recipient <input type="checkbox"/> Not Current TANF Recipient <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Current TANF Recipient <input type="checkbox"/> Not Current TANF Recipient <input type="checkbox"/> Declined to ID		
AFI-F013 a, b	EITC Recipient – Unduplicated number of AFI IDA holders self-reported in each demographic category.	<input type="checkbox"/> Has Ever Claimed EITC <input type="checkbox"/> Never Has Claimed EITC <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Has Ever Claimed EITC <input type="checkbox"/> Never Has Claimed EITC <input type="checkbox"/> Declined to ID		
AFI-F014 a, b	Banking – Number of AFI IDA holders self-reported in each demographic category. AFI IDA holders may be counted more than once in this category.	<input type="checkbox"/> Ever held a checking account <input type="checkbox"/> Ever held a savings account <input type="checkbox"/> Ever used direct deposit <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Ever held a checking account <input type="checkbox"/> Ever held a savings account <input type="checkbox"/> Ever used direct deposit <input type="checkbox"/> Declined to ID		
<b>Household Size, Composition and Income</b>					
<b>Item</b>	<b>Data Element</b>	<b>A-All IDA Holders</b>		<b>B-IDA Holders Who Made Asset Purchase</b>	
AFI-F015 a, b	Total Household size – ‘Household’ means all individuals who share use of a dwelling unit as primary quarters for living and eating separate from other individuals.	<input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID	<input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID
AFI-F016 a, b	Household Composition – Adults Number of persons age 18 and older in the household at the time of enrollment. Please include the account holder in the count.	<input type="checkbox"/> Zero <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Zero <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID

AFI-F017 a, b	Household Composition – Children Number of children (younger than age 18) in the AFI IDA Holder household, at the time of enrollment. Please include account holder in the count.	<input type="checkbox"/> Zero <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID	<input type="checkbox"/> Zero <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four	<input type="checkbox"/> Five <input type="checkbox"/> Six <input type="checkbox"/> Seven <input type="checkbox"/> Eight+ <input type="checkbox"/> Declined to ID
AFI-F018 a, b	Income Level – Indicate the number of AFI IDA holders who reported household earned income at each level using the federal poverty guidelines developed by HHS.	<b>Federal Poverty Guideline</b> <input type="checkbox"/> Below 100% <input type="checkbox"/> 100–150% <input type="checkbox"/> 151-200% <input type="checkbox"/> Declined to ID		<b>Federal Poverty Guideline</b> <input type="checkbox"/> Below 100% <input type="checkbox"/> 100–150% <input type="checkbox"/> 151-200% <input type="checkbox"/> Declined to ID	

**AFI PPR-G – Participant Demographics at the Time of Asset Purchase**

[Link to PPR Long Form Instructions – Section G](#)

AFI PPR Section G Participant Demographics at the Time of Asset Purchase		
Item	Data Element	
AFI-G001	Educational Attainment – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	<input type="checkbox"/> Completed grades K-5 <input type="checkbox"/> Completed grades 6-8 <input type="checkbox"/> Completed grades 9-11 <input type="checkbox"/> High School Diploma <input type="checkbox"/> Vocational School Diploma/Degree <input type="checkbox"/> Some College <input type="checkbox"/> AA Degree/Graduated two-year college <input type="checkbox"/> BA/BS Degree/Graduated four-year college <input type="checkbox"/> Some Graduate School/Attended Graduate School <input type="checkbox"/> MA/MS, etc Graduate Degree <input type="checkbox"/> Declined to ID
AFI-G002	Home Ownership – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	<input type="checkbox"/> Owns a Home <input type="checkbox"/> Does Not Own a Home <input type="checkbox"/> Declined to ID
AFI-G003	Business Ownership – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	<input type="checkbox"/> Owns a Business <input type="checkbox"/> Does Not Own a Business <input type="checkbox"/> Declined to ID
AFI-G004	TANF Recipients – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	<input type="checkbox"/> Current TANF Recipient <input type="checkbox"/> Not Current TANF Recipient <input type="checkbox"/> Declined to ID

**AFI PPR-H – Project and Participant Funds**

[Link to PPR Long Form Instructions – Section H](#)

AFI PPR Section H Project and Participant Funds				
Financial Institutions Holding AFI Participant IDAs				
<b>AFI-H001</b>				
This section requests information about AFI IDAs open at each institution and combined current balances of AFI IDA Holder AFI IDA accounts as of the final day of this reporting period. Include only amounts deposited by participants				
A- Institution Name	B- Institution Address	C- Number AFI IDAs Open 9/30	D- Amount On Deposit 9/30	E- Account Type:
				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
<i>Add lines as necessary.</i>				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
<b>AFI-H002</b> Total number institutions		<b>AFI-H003</b> Total number of open AFI IDAs	<b>AFI-H004</b> Total amount of savings on deposit	
AFI Project Funds				
Information about AFI Project Reserve Fund(s) maintained by grantee / project partner(s) <i>should not</i> include information on participant AFI IDAs				
<b>AFI-H005</b>	Total amount of required non-federal funds for this project received by the grantee			
<b>AFI-H006</b>	Total amount of federal AFI funds expended for allowable project costs other than participant match			
<b>AFI-H007</b>	Total amount of non-federal funds expended for allowable project costs other than participant match			
<b>AFI-H008</b>	Total amount of interest earned on account(s) holding AFI and non-federal funds			
AFI-H009 Financial Institutions Holding AFI Project Funds				
A- Institution Name	B- Institution Address	C- Funds On Deposit 9/30	D- Account Type	
			<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing	
			<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing	
			<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing	
			<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing	
<i>Add lines or append additional pages as necessary.</i>				<input type="checkbox"/> Interest Bearing <input type="checkbox"/> Non-Interest Bearing
<b>AFI-H010</b> Total number institutions		<b>AFI-H011</b> Total amount of funds on deposit		

## Proposed Instructions for AFI PPR Long Form

Instructions for AFI PPR Cover Page <a href="#">Link to AFI PPR Long Form – Cover Page</a>		
Item	Data Element	Instructions / Description
1	Federal Agency and Organization Element to Which Report is Submitted	Enter HHS/ACF/OCS.
2	Grant Number Assigned by Federal Agency	Enter the AFI grant number (Box 3 on Notice of Award). The grant number is in the format: 90E1XXXX. Grantees with multiple AFI awards must submit separate reports for each grant award.
3a	DUNS Number	Enter the grantee organization's DUNS number. (Data Universal Numbering System) or its Central Contract Registry extended DUNS number (listed in Box 25 on Notice of Award).
3b	EIN	Enter the grantee's Employer Identification number (EIN) (Box 22 on Notice of Award).
4	Recipient Organization	Enter the grantee organization name and complete address (Box 11 on Notice of Award).
5	Recipient Identifying Number or Account Number	Optional. Enter the account or other identifying number that the grantee has assigned to the award reported on this form.
6	Project/Grant Period	Enter the beginning and end dates of the five-year project period for the grant (Box 9 on Notice of Award). If ACF has approved a 12-month no-cost extension, the new end date is shown in Box 9 of the revised Notice of Award provided with the notification that the no-cost extension was approved.
7	Reporting Period End Date	Enter the reporting period end date.
8	Final Report	Select Yes if this is the final report for the grant. The final AFI PPR is due 90 days after the grant ends, like the final Federal Financial Report (SF-425). Regardless of when the grant ends, the final AFI PPR will always be a long form report.
9	Report Frequency	Select "Quarterly."
10	Performance Narrative	Optional.
11	Certification	
11a	Typed or Printed Name and Title of Authorized Official	Enter the name and title of the authorized official (AO). Box 11 of the Notice of Award should list the AO for the grant.
11b	Signature of Authorized Official	Signature of the grantee's authorized official.
11c	Telephone	Enter the telephone number (area code and extension) of the authorized official.
11d	Email Address	Enter the email address of the authorized official.
11e	Date Report Submitted	Enter the date the report is submitted. Use a month, day, year format: MM/DD/YYYY format
12	Agency use only	This field is for agency use only.

## Instructions for AFI PPR Section B

[Link to AFI PPR Long Form – Section B](#)

### Contact Information and Project Scope

Item	Data Element	Instructions / Description
<b>Grantee Information</b>		
AFI-B001	Grantee Name	Self-explanatory
AFI-B002	AFI Project Name	Enter the name of the IDA project administered through your organization.
AFI-B003	Organization Fax Number	Enter your organization's fax number.
AFI-B004	Organization Website	Enter the URL web address for your organization's website.
<b>Grantee Contacts</b>		
<b>Authorized Official (AO)</b> An AO submits a grant on behalf of a company, organization, institution, or government. Only an AO has the authority to sign and submit grant applications. Box 11 of the Notice of Award should list the AO for the grant.		
AFI-B005	AO First Name	Enter the first name of your organization's authorized official as it appears on Notice of Award.
AFI-B006	AO Last Name	Enter the last name of your organization's authorized official.
AFI-B007	AO Title	Enter your authorized official's formal title.
AFI-B008	AO Direct Phone Number	Enter your authorized official's phone number.
AFI-B009	AO E-Mail Address	Enter your authorized official's email address.
<b>Principal Investigator</b> - Please provide information for the person most familiar with day-to-day operation of your AFI IDA project. This Principal Investigator (PI) should be formally listed as the PI in the Notice of Award for the grant.		
AFI-B010	First Name	Enter the first name for your PI at your organization.
AFI-B011	Last Name	Enter the last name for your PI at your organization.
AFI-B012	Title	Enter your PI's formal title.
AFI-B013	Direct Phone Number	Enter your PI's phone number.
AFI-B014	E-Mail Address	Enter your PI's email address.
<b>Project Scope</b>		
AFI-B015	Geographic Service Area	Enter the geographic service area for this project using generally available information such as census areas, postal areas, political or administrative areas, or physical boundaries.
AFI-B016	Service Area Type	Enter the service area type for this project using U.S. Census Bureau data for the defined service area at <a href="http://www.census.gov/geo/www/ua/2010urbanruralclass.html">http://www.census.gov/geo/www/ua/2010urbanruralclass.html</a> . * An Urbanized Area (UAs) of 50,000 or more people; * An Urban Cluster (UCs) of at least 2,500 and less than 50,000 people; * A Rural area
AFI-B017	Service Area Poverty Rate	Enter the service area poverty rate at time of application for this project using the U.S. Census Bureau Poverty rates for People and Households at <a href="http://www.census.gov/hhes/www/poverty/">www.census.gov/hhes/www/poverty/</a> .
AFI-B018	Service Area Unemployment Rate	Enter the service area unemployment rate at time of application for this project using the Department of Labor's Local Area Unemployment Statistics Home Page at <a href="http://www.bls.gov/lau/">www.bls.gov/lau/</a> .
AFI-B019	Target Population	Enter the target population for this project. Target populations are those that the project is actively targeting and specifically recruiting for service delivery.
<b>Sources of Non Federal Funding Match</b>		
AFI-B020a	Source Type	Select the type of source of the non-federal funding match.
AFI-B020b	Amount of Funds	Enter the amount of funds received from that source type. If there are multiply sources for a source type, enter the total amount of all of the sources' non-federal funding.
<b>Project Partner Information</b>		
AFI-B021	Number of Project Partners	Enter the number of project partners which independently open and administer AFI IDAs.
<b>Project Partner Contacts</b>		
Duplicate and complete B022 for each project partners which independently opens and administers AFI IDAs.		
AFI-B022a	Project Partner Organization Name	Enter the legal name of the project partner organization for your AFI grant.
AFI-B022b	Address 1	Enter the street address for the project partner organization
AFI-B022c	Address 2	Enter the street address for the project partner organization.
AFI-B022d	City	Enter the city for your project partner organization.
AFI-B022e	State	Enter the state for your project partner organization.
AFI-B022f	Zip Code	Enter the zip code for your project partner organization.
AFI-B022g	Phone	Enter the main phone number for your project partner organization.
AFI-B022h	Project Partner Contact First Name	Enter the first name for the project partner organization contact.
AFI-B022i	Project Partner Contact Last Name	Enter the last name for the project partner organization contact.
AFI-B022j	Project Partner Contact Title	Enter the formal title for the project partner organization contact.
AFI-B022k	Project Partner Contact Direct Phone Number	Enter the phone number for the project partner organization contact.
AFI-B022l	Project Partner Contact E-Mail Address	Enter the email address for the project partner organization contact.

## Instructions for AFI PPR Section C

[Link to AFI PPR Long Form – Section C](#)

### Project Elements

Item	Data Element	Instructions / Description
<b>Allowed Asset Purchase Category – Business Capitalization</b>		
AFI-C001	Business Capitalization Allowed?	Select Yes or No to whether or not business capitalization asset purchases are allowed in this project. If no, skip questions AFI-C002 through AFI-C016.
AFI-C002	Match Rate	Enter the match rate for business capitalization asset purchases.
AFI-C003	Maximum Savings Matched	Enter the maximum amount of AFI IDA holder savings that the project will match for this asset purchase.
AFI-C004	Is there a Maximum Savings Period?	Select Yes or No to whether or not there is a maximum savings period for business capitalization. If no, skip to question AFI-C006.
AFI-C005	Maximum Savings Period in months	Enter the maximum savings period in months for AFI IDA holders saving for this asset purchase.
AFI-C006	Total Number of Asset Purchases Expected – Business Capitalization	Enter the number of asset purchases expected in this project for business capitalization.
AFI-C007	Is there a Minimum Opening Deposit?	Select Yes or No to whether or not there is a minimum opening deposit for business capitalization. If no, skip to question AFI-C009.
AFI-C008	Minimum Opening Deposit	Enter the minimum opening deposit for AFI IDA holder savings for this asset purchase.
AFI-C009	Is there a deposit frequency requirement?	Select Yes or No to whether or not there is a deposit frequency requirement for business capitalization. If no, skip to question AFI-C011.
AFI-C010	Required Deposit Frequency	If applicable, select the required frequency of deposits for AFI IDA holders saving for this asset purchase.
AFI-C011	Is there a Minimum Regular Deposit?	Select Yes or No to whether or not there is a minimum regular deposit for business capitalization. If no, skip to question AFI-C013.
AFI-C012	Minimum Regular Deposit	Enter the minimum regular deposit for AFI IDA holders saving for this asset purchase.
AFI-C013	Lump Sum Allowed?	Select yes or no if lump sum deposits are allowed for AFI IDA holders saving for this asset purchase.
AFI-C014	Limitations on Lump Sums	If applicable, type any limitations this project has on lump sum deposits.
AFI-C015	Is there a Maximum Number Missed Deposits?	Select Yes or No to whether or not there is a maximum number of missed deposits for business capitalization. If no, skip to question AFI-C017.
AFI-C016	Maximum Number Missed Deposits	Enter the maximum number of missed deposits allowed for AFI IDA holders saving for this asset purchase.
<b>Allowed Asset Purchase Category – First Home Purchase</b>		
AFI-C017	First Home Purchase Allowed?	Select Yes or No to whether or not first home asset purchases are allowed in this project? If no, skip questions AFI-C018 through AFI-C032.
AFI-C018	Match Rate	Enter the match rate for first home asset purchases.
AFI-C019	Maximum Savings Matched	Enter the maximum amount of AFI IDA holder savings that the project will match for this asset purchase.
AFI-C020	Is there a Maximum Savings Period?	Select Yes or No to whether or not there is a maximum savings period for first home purchase. If no, skip to question AFI-C022.
AFI-C021	Maximum Savings Period in months	Enter the maximum savings period in months for AFI IDA holders saving for this asset purchase.
AFI-C022	Total Number of Asset Purchases Expected – First Home Purchase	Enter the number of asset purchases expected in this project for first home purchase.
AFI-C023	Is there a Minimum Opening Deposit?	Select Yes or No to whether or not there is a minimum opening deposit for first home purchase. If no, skip to question AFI-C025.
AFI-C024	Minimum Opening Deposit	Enter the minimum opening deposit for AFI IDA holder savings for this asset purchase.
AFI-C025	Is there a deposit frequency requirement?	Select Yes or No to whether or not there is a deposit frequency requirement for first home purchase. If no, skip to question AFI-C027.
AFI-C026	Required Deposit Frequency	If applicable, select the required frequency of deposits for AFI IDA holders saving for this asset purchase.
AFI-C027	Is there a Minimum Regular Deposit?	Select Yes or No to whether or not there is a minimum regular deposit for first home purchase. If no, skip to question AFI-C029.
AFI-C028	Minimum Regular Deposit	Enter the minimum regular deposit for AFI IDA holders saving for this asset purchase.
AFI-C029	Lump Sum Allowed?	Select yes or no to whether or not lump sum deposits are allowed for AFI IDA holders saving for this asset purchase.
AFI-C030	If Applicable, Limitations on Lump Sums	If applicable, type any limitations this project has on lump sum deposits.
AFI-C031	Is there a Maximum Number Missed Deposits?	Select Yes or No to whether or not there is a maximum number of missed deposits for first home purchase. If no, skip to question AFI-C033.
AFI-C032	Maximum Number Missed Deposits	Enter the maximum number of missed deposits allowed for AFI IDA holders saving for this asset purchase.

<b>Allowed Asset Purchase Category – Post-Secondary Education or Training</b>		
AFI-C033	Post-Secondary Education or Training Allowed?	Select Yes or No to whether or not post-secondary education or training asset purchases are allowed in this project. If no, skip questions AFI-C034 through AFI-C048.
AFI-C034	Match Rate	Enter the match rate for post-secondary education or training asset purchases.
AFI-C035	Maximum Savings Matched	Enter the maximum amount of AFI IDA holder savings that the project will match for this asset purchase.
AFI-C036	Is there a Maximum Savings Period?	Select Yes or No to whether or not there is a maximum savings period for post-secondary education or training. If no, skip to question AFI-C038.
AFI-C037	Maximum Savings Period in months	Enter the maximum savings period in months for AFI IDA holders saving for this asset purchase.
AFI-C038	Total Number of Asset Purchases Expected – Post-Secondary Education or Training	Enter the number of asset purchases expected in this project for post-secondary education or training.
AFI-C039	Is there a Minimum Opening Deposit?	Select Yes or No to whether or not there is a minimum opening deposit for post-secondary education or training. If no, skip to question AFI-C041.
AFI-C040	Minimum Opening Deposit	Enter the minimum opening deposit for AFI IDA holder savings for this asset purchase.
AFI-C041	Is there a deposit frequency requirement?	Select Yes or No to whether or not there is a deposit frequency requirement for post-secondary education or training. If no, skip to question AFI-C043.
AFI-C042	Required Deposit Frequency	If applicable, select the required frequency of deposits for AFI IDA holders saving for this asset purchase.
AFI-C043	Is there a Minimum Regular Deposit?	Select Yes or No to whether or not there is a minimum regular deposit for post-secondary education or training. If no, skip to question AFI-C045.
AFI-C044	Minimum Regular Deposit	Enter the minimum regular deposit for AFI IDA holders saving for this asset purchase.
AFI-C045	Lump Sum Allowed?	Select yes or no to whether or not lump sum deposits are allowed for AFI IDA holders saving for this asset purchase.
AFI-C046	If Applicable, Limitations on Lump Sums	If applicable, type any limitations this project has on lump sum deposits.
AFI-C047	Is there a Maximum Number Missed Deposits?	Select Yes or No to whether or not there is a maximum number of missed deposits for post-secondary education or training. If no, skip to question AFI-C049.
AFI-C048	Maximum Number Missed Deposits	Enter the maximum number of missed deposits allowed for AFI IDA holders saving for this asset purchase.
<b>Allowed Asset Purchase Category – Transfer To Family Member For Eligible Asset Purchase</b>		
AFI-C049	Transfer to Family Member Allowed?	Select Yes or No to whether or not transfers to family members for asset purchases are allowed in this project. If no, skip questions AFI-C050 through AFI-C064.
AFI-C050	Match Rate	Enter the match rate for transfers to family members for asset purchases.
AFI-C051	Maximum Savings Matched	Enter the maximum amount of AFI IDA holder savings that the project will match for this asset purchase.
AFI-C052	Is there a Maximum Savings Period?	Select Yes or No to whether or not there is a maximum savings period for post-secondary education or training. If no, skip to question AFI-C054.
AFI-C053	Maximum Savings Period in months	Enter the maximum savings period in months for AFI IDA holders saving for this asset purchase.
AFI-C054	Total Number of Asset Purchases Expected – Transfer	Enter the number of asset purchases expected in this project for transfer.
AFI-C055	Is there a Minimum Opening Deposit?	Select Yes or No to whether or not there is a minimum opening deposit for transfers to family members. If no, skip to question AFI-C057.
AFI-C056	Minimum Opening Deposit	Enter the minimum opening deposit for AFI IDA holder savings for this asset purchase.
AFI-C057	Is there a deposit frequency requirement?	Select Yes or No to whether or not there is a deposit frequency requirement for transfer. If no, skip to question AFI-C059.
AFI-C058	Required Deposit Frequency	Enter the required frequency of deposits for AFI IDA holders saving for this asset purchase.
AFI-C059	Is there a Minimum Regular Deposit?	Select Yes or No to whether or not there is a minimum regular deposit for transfers to family members. If no, skip to question AFI-C061.
AFI-C060	Minimum Regular Deposit	Enter the minimum regular deposit for AFI IDA holders saving for this asset purchase.
AFI-C061	Lump Sum Allowed?	Select yes or no to whether or not lump sum deposits are allowed for AFI IDA holders saving for this asset purchase.
AFI-C062	If Applicable, Limitations on Lump Sums	If applicable, type any limitations this project has on lump sum deposits.
AFI-C063	Is there a Maximum Number Missed Deposits?	Select Yes or No to whether or not there is a maximum number of missed deposits for transfers to family members. If no, skip to question AFI-C064.
AFI-C064	Maximum Number Missed Deposits	Enter the maximum number of missed deposits allowed for AFI IDA holders saving for this asset purchase.

## Instructions for AFI PPR Section D

[Link to AFI PPR Long Form – Section D](#)

### Account Activity

Item	Data Element	Instructions / Description
<b>AFI Grant Funds</b>		
AFI-D001	Amount of federal AFI award	Self-explanatory
AFI-D002	Federal AFI award drawn down to date	Self-explanatory
<b>Account Openings</b>		
AFI-D003	Total number individuals who applied for an AFI IDA	Enter the number of individuals who applied for an AFI IDA from the date of award through the end of this reporting period.
AFI-D004	Total number applicants found eligible	Enter the number of applicants who were found eligible for AFI IDAs from the date of award through the end of this reporting period.
AFI-D005	Total number AFI IDAs opened from the date of award through the last day of this reporting period	Enter the number of IDAs opened from the date of award through the end of this reporting period. Include accounts transferred to this AFI IDA project from another AFI IDA project.
AFI-D006	Total number AFI IDAs currently open	Enter the number AFI IDAs open as of the last day of this reporting period.
AFI-D007	Total amount AFI IDA savings deposits from date of award through the last day of this reporting period	Enter the amount of savings that participants deposited into AFI IDAs from date of award through the end of this reporting period.
AFI-D008	Total balance amount in AFI IDAs open on last day of this reporting period	Enter the amount of balances in AFI IDAs on deposit as of the last day of this reporting period.
AFI-D009	Total number AFI IDA holders who reached the maximum federal match level	Enter the number of AFI IDA holders who reached the maximum federal match level from date of award through the last day of this reporting period.
AFI-D010	Optional: Number of people on the waiting list to open an AFI IDA because all available slots are full	This is an optional question; no reply is required. Enter the number of people who are on the waiting list to open an AFI IDA on the last day of this reporting period.
<b>Account Closings</b>		
AFI-D011	Total number AFI IDAs closed from date of award through the last day of this reporting period	Enter the number of AFI IDAs closed from the date of award through the last day of this reporting period. This includes IDAs closed for any reason (receiving or not receiving match funds).
AFI-D012	Total number AFI IDAs closed in which participants withdrew savings and received match for asset purchases	Enter the number of AFI IDAs closed when participants withdrew their savings and received match funds for an authorized asset purchase from date of award through the last day of this reporting period.
AFI-D013	Total number AFI IDAs closed due to voluntary withdrawal	Enter the number of AFI IDAs closed when participants voluntarily withdrew from the project from date of award through the last day of this reporting period.
AFI-D014	Total number AFI IDAs closed due to termination by grantee	Enter the number of AFI IDAs closed when participants were terminated from the project from date of award through the last day of this reporting period.
AFI-D015	Total number AFI IDAs closed due to failure to replenish emergency withdrawal within 12 months	Enter the number of AFI IDAs closed due to participant failure to replenish emergency withdrawals from date of award through the last day of this reporting period.
<b>Matched Withdrawals</b>		
AFI-D016	Total number AFI IDA holders making withdrawals for asset purchase	Enter the number of AFI IDA holders making withdrawals for asset purchase from date of award through the last day of this reporting period.
AFI-D017	Total number AFI IDA holders making withdrawals in multiple asset categories	Enter the number of AFI IDA holders making withdrawals in multiple asset categories from date of award through the last day of this reporting period.
AFI-D018	Total amount of AFI IDA savings withdrawn from an AFI IDA for an asset purchase	Enter the amount of AFI IDA savings withdrawn for authorized asset purchases from date of award through the last day of this reporting period.
AFI-D019	Total amount of federal AFI grant funds disbursed as matching funds for an asset purchase	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized asset purchases from date of award through the last day of this reporting period.
AFI-D020	Total amount of non-federal cash disbursed as matching funds for an asset purchase	Enter the amount of non-federal cash disbursed as matching funds for authorized asset purchases from date of award through the last day of this reporting period.
<b>Matched Withdrawals for First Home Purchases</b>		
AFI-D021	Does this project allow use of AFI IDA savings to pay for authorized first home purchase expenses?	Select yes or no to indicate whether the AFI project allows participants to use their AFI IDA savings to pay for authorized first home purchase expenses.
AFI-D022	Total number AFI IDA holders who withdrew their AFI IDA savings for authorized first home purchase expenses	Enter the number of AFI IDA holders who withdrew their AFI IDA savings for authorized first home purchase expenses from date of award through the last day of this reporting period.
AFI-D023	Total amount AFI IDA savings withdrawn for authorized first home purchase expenses	Enter the amount of AFI IDA savings withdrawn from an AFI IDA for authorized first home purchase expenses from date of award through the last day of this reporting period. (Do not include match funds.)
AFI-D024	Total amount of federal AFI grant funds disbursed as matching funds for authorized first home purchase expenses	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized first home purchase expenses from date of award through the last day of this reporting period.

AFI-D025	Total amount of non-federal cash disbursed as matching funds for authorized first home purchase expenses	Enter the amount of non-federal cash disbursed as matching funds for authorized first home purchase expenses from date of award through the last day of this reporting period.
<b>Matched Withdrawals for Business Capitalization</b>		
AFI-D026	Does this project allow use of AFI IDA savings to pay for authorized business capitalization expenses?	Select yes or no to indicate whether the AFI project allows participants to use their AFI IDA savings to pay for authorized business capitalization expenses.
AFI-D027	Total number AFI IDA holders who withdrew their AFI IDA savings for authorized business capitalization expenses	Enter the number of AFI IDA holders who withdrew their AFI IDA savings for authorized business capitalization expenses from date of award through the last day of this reporting period.
AFI-D028	Total amount of AFI IDA savings withdrawn for authorized business capitalization expenses	Enter the amount of AFI IDA savings withdrawn from an AFI IDA for authorized business capitalization expenses from date of award through the last day of this reporting period. (Do not include match funds.)
AFI-D029	Total amount of federal AFI grant funds disbursed as matching funds for authorized business capitalization expenses	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized business capitalization expenses from date of award through the last day of this reporting period.
AFI-D030	Total amount of non-federal cash disbursed as matching funds for authorized business capitalization expenses	Enter the amount of non-federal cash disbursed as matching funds for authorized business capitalization expenses from date of award through the last day of this reporting period.
<b>Matched Withdrawals for Post-Secondary Education or Training</b>		
AFI-D031	Does this project allow use of AFI IDA savings to pay for authorized post-secondary education or training expenses?	Select yes or no to indicate whether the AFI project allows participants to use their AFI IDA savings to pay for authorized post-secondary education or training expenses.
AFI-D032	Total number of AFI IDA holders who withdrew their AFI IDA savings for authorized post-secondary education or training expenses	Enter the number of AFI IDA holders who withdrew AFI IDA savings for authorized post-secondary education or training expenses from date of award through the last day of this reporting period.
AFI-D033	Total amount of AFI IDA savings withdrawn for authorized post-secondary education or training expenses	Enter the amount of AFI IDA savings withdrawn from an AFI IDA for authorized post-secondary education or training expenses from date of award through the last day of this reporting period. (Do not include match funds.)
AFI-D034	Total amount of federal AFI grant funds disbursed as matching funds for authorized post-secondary education or training expenses	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized post-secondary education or training expenses from date of award through the last day of this reporting period.
AFI-D035	Total amount of non-federal cash contribution disbursed as matching funds for authorized post-secondary education or training expenses	Enter the amount of non-federal cash contribution disbursed as matching funds for authorized post-secondary education or training expenses from date of award through the last day of this reporting period.
<b>Matched Withdrawals for Transfers to IDA of Dependent or Spouse</b>		
AFI-D036	Does this project offer transfers to the AFI IDA of a dependent or spouse?	Select yes or no to indicate whether the AFI project allows participants to transfer their AFI IDA savings to the AFI IDA of a dependent or spouse.
AFI-D037	Total number of AFI IDA holders who withdrew AFI IDA savings for transfer to IDA of a dependent or spouse	Enter the number of AFI IDA holders who withdrew AFI IDA savings for an authorized transfer to a spouse's or dependent's AFI IDA from date of award through the last day of this reporting period.
AFI-D038	Total amount of AFI IDA savings withdrawn for transfer to AFI IDA of a dependent or spouse	Enter the amount of AFI IDA savings withdrawn from an AFI IDA for transfer to the AFI IDA of a spouse or dependent from date of award through the last day of this reporting period. (Do not include match funds)
AFI-D039	Total amount of federal AFI grant funds disbursed as matching funds for transfer to AFI IDA of a dependent or spouse	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized IDA transfers from date of award through the last day of this reporting period.
AFI-D040	Total amount of non-federal cash contribution disbursed as matching funds for transfer to AFI IDA of a dependent or spouse	Enter the amount of non-federal cash contribution disbursed as matching funds for transfer to AFI IDA of a dependent or spouse from date of award through the last day of this reporting period.
<b>Unmatched Withdrawals</b>		
AFI-D041	Total AFI IDA savings withdrawn with no match	Enter the amount of AFI IDA savings withdrawn with no match funds disbursed from date of award through the last day of this reporting period.
<b>Unmatched Withdrawals - Emergency Withdrawals</b>		
AFI-D042	Total number AFI IDA holders making withdrawals for emergency purposes defined by AFI legislation	Enter the number of AFI IDA holders who made authorized emergency withdrawals from date of award through the last day of this reporting period. Count participants making multiple emergency withdrawals only once. Qualified emergency expenses as defined by the AFI Act are: 1- necessary medical care for the IDA holder, spouse or dependent; 2- payments to prevent eviction from or foreclosure on the IDA holder's principal residence; 3- payments to meet IDA holder's necessary living expenses following loss of employment.

AFI-D043	Total number AFI IDA holders making withdrawals for expenses for medical care or necessary to obtain medical care, for the individual or a spouse or dependent of the individual	Enter the number of AFI IDA holders who made authorized withdrawals for expenses for medical care or necessary to obtain medical care for the individual or a spouse or dependent of the individual, from date of award through the last day of this reporting period.
AFI-D044	Total amount AFI IDA savings withdrawn for expenses for medical care or necessary to obtain medical care, for the individual or a spouse or dependent of the individual	Enter the amount of AFI IDA savings withdrawn from AFI IDAs for expenses for medical care or necessary to obtain medical care for the individual or a spouse or dependent of the individual, from date of award through the last day of this reporting period.
AFI-D045	Total number AFI IDA holders making withdrawals for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclosure on the mortgage for the principal residence of the individual	Enter the number of AFI IDA holders who made authorized withdrawals for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclose on the mortgage for the principal residence of the individual, from date of award through the last day of this reporting period.
AFI-D046	Total amount AFI IDA savings withdrawn for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclosure on the mortgage for the principal residence of the individual	Enter the amount of AFI IDA savings withdrawn from AFI IDAs for payments necessary to prevent the eviction of the individual from the residence of the individual, or foreclose on the mortgage for the principal residence of the individual, from date of award through the last day of this reporting period.
AFI-D047	Total number AFI IDA holders making withdrawals for payments necessary to enable the individual to meet necessary living expenses following loss of employment	Enter the total number of AFI IDA holders who made authorized withdrawals for payments necessary to enable the individual to meet necessary living expenses following loss of employment, from date of award through the last day of this reporting period.
AFI-D048	Total amount AFI IDA savings withdrawn for payments necessary to enable the individual to meet necessary living expenses following loss of employment	Enter the total amount of AFI IDA savings withdrawn from AFI IDAs for payments necessary to enable the individual to meet necessary living expenses following loss of employment, from date of award through the last day of this reporting period.
AFI-D049	Total amount AFI IDA savings deposited to replenish AFI IDAs after authorized emergency withdrawals	Enter the total amount of AFI IDA savings deposited to replenish AFI IDAs after authorized emergency withdrawals from date of award through the last day of this reporting period.
<b>Other Unmatched Withdrawals – Other Program Withdrawal</b>		
AFI-D050	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting without making asset purchase	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting without making asset purchase from date of award through the last day of this reporting period.
AFI-D051	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting without making asset purchase	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting without making asset purchase from date of award through the last day of this reporting period.
AFI-D052	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder moved out of the of project area	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder moved out of the of project area from date of award through the last day of this reporting period.
AFI-D053	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because the holder moved out of the project area	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting because the holder moved out of the project area without making asset purchase from date of award through the last day of this reporting period.
AFI-D054	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder no longer wanted to make an asset purchase	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because the holder no longer wanted to make an asset purchase from date of award through the last day of this reporting period.
AFI-D055	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because the holder no longer wanted to make an asset purchase	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting because the holder no longer wanted to make an asset purchase from date of award through the last day of this reporting period.
AFI-D056	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of a financial need not defined above	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of a financial need not defined above from date of award through the last day of this reporting period.
AFI-D057	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of a financial need not defined above	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting because of a financial need not defined above from date of award through the last day of this reporting period.
AFI-D058	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of death of the holder	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of death of the holder from date of award through the last day of this reporting period.
AFI-D059	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of death of the holder	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting because of death of the holder from date of award through the last day of this reporting period.
AFI-D060	Total number AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of other reason	Enter the total number of AFI IDA holders who made unmatched withdrawals upon voluntarily exiting because of other reason from date of award through the last day of this reporting period.

AFI-D061	List other reason(s) for why AFI IDA holders made unmatched withdrawals upon voluntarily exiting because of other reason	Enter short descriptions of the other reason(s) for why AFI IDA holders voluntarily exited the project.
AFI-D062	Total amount AFI IDA savings withdrawn by AFI IDA holders upon voluntarily exiting because of other reason	Enter the total amount of AFI IDA savings withdrawn from IDAs by AFI IDA holders upon voluntarily exiting because of other reason from date of award through the last day of this reporting period.
<b>Other Unmatched Withdrawals – Termination</b>		
AFI-D063	Total number of AFI IDA holders who made unmatched withdrawals upon being terminated from the AFI project	Enter the total number of AFI IDA holders who made unmatched withdrawals upon being terminated by the grantee without making asset purchase from date of award through the last day of this reporting period.
AFI-D064	Total AFI IDA savings withdrawn by terminated AFI IDA holders without asset purchase	Enter the amount of AFI IDA savings withdrawn by AFI IDA holders terminated by the grantee from date of award through the last day of this reporting period.

## Instructions for AFI PPR Section E

[Link to AFI PPR Long Form – Section E](#)

### Training, Services, and Assistance Offered

Item	Data Element	Instructions / Description
<b>Structured Planning Exercises for First Home Purchase</b>		
AFI-E001	Does this project offer structured planning exercises for first home purchase?	Structured planning exercises for first home purchase are training or counseling services beyond basic financial literacy training that help AFI IDA holders understand the benefits, liabilities, and responsibilities of home ownership, including home selection and financing intended to improve the likelihood of successful purchase and retention of a primary residence. Select one of the boxes to these indicate whether structured planning exercises for first home purchase and ownership were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E002	Hours of structured planning for first home purchase required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E003	How was structured planning exercises for first home purchase provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E004	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by structured planning for first home purchase services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Structured Planning Exercises for Business Capitalization</b>		
AFI-E005	Does this project offer structured planning exercises for business capitalization?	Structured planning exercises for business capitalization asset purchasers include professional instruction or counseling on starting, managing and financing a business, market research and business plan development assistance intended to improve the likelihood of successful small business launch or expansion. Select one of the boxes to indicate whether structured planning exercises for business capitalization were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E006	Hours of structured planning for business capitalization required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E007	How was structured planning exercises for business capitalization provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E008	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by structured planning for business capitalization services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Structured Planning Exercises for Post-Secondary Education or Training</b>		
AFI-E009	Does this project offer structured planning exercises for post-secondary education or training?	Structured planning exercises for post-secondary education or training are activities designed to assess individual academic, personal/social and career development needs and goals and using this insight to design a personalized education plan that promotes and enhances student AFI IDA holders' success. Select one of the boxes to indicate whether structured planning exercises for post-secondary education or training were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E010	Hours of structured planning for post-secondary education or training required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E011	How was structured planning exercises for post-secondary education or training provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E012	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by structured planning for post-secondary education or training services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.

Economic Literacy or Financial Education		
AFI-E013	Does this project offer economic literacy or financial education to AFI IDA holders?	Economic literacy or financial education includes training or structured learning opportunities to help AFI IDA holders develop knowledge and understanding of financial concepts like interest, financial planning, the mechanics of credit, advantageous savings methods, consumer rights and other personal financial matters such as real estate, insurance, investing, saving, tax planning and retirement. Select one of the boxes to indicate whether economic literacy or financial education services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E014	Economic literacy or financial education curriculum used	Select the option that best represents which economic literacy or financial education curriculum is used by the project.
AFI-E015	Hours of economic literacy instruction required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E016	How was economic literacy or financial education provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E017	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by economic literacy or financial education services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Advanced Financial Education		
AFI-E018	Does this project offer advanced financial education to AFI IDA holders?	Advanced financial education includes subject areas beyond what is normally taught in basic economic literacy and financial education, as well as more in-depth curriculum on any financial subject area. Select one of the boxes to indicate whether advanced financial education services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E019	Hours of advanced financial education required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E020	How was advanced financial education provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E021	Total number of unique AFI IDA holders served by advanced financial education	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by advanced financial education services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Financial Counseling		
AFI-E022	Does this project offer financial counseling to AFI IDA holders?	Financial counseling refers to financial training and opinions provided to an individual or family regarding their <i>specific</i> financial needs. Select one of the boxes to indicate whether financial counseling services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E023	Hours of financial counseling required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E024	How was financial counseling provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E025	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by financial counseling from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Budgeting Assistance		
AFI-E026	Does this project offer budgeting assistance to AFI IDA holders?	Budgeting assistance involves working with AFI IDA holders to develop a systematic and itemized plan allocating available income for expected expenditures during a given period. Many AFI IDA holders' budgets incorporate resources (time, social service benefits, and in-kind support) that are not part of program eligibility assessments. Select one of the boxes to indicate whether budgeting assistance services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E027	Hours of budgeting assistance required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E028	How was budgeting assistance provided?	Select whether the service was provided by the grantee, was outsourced, or both.

AFI-E029	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by budgeting assistance services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Credit Counseling</b>		
AFI-E030	Does this project offer credit counseling to AFI IDA holders?	Credit Counseling refers to services provided by the project which assist AFI IDA holders to establish budget and repayment plans with creditors, negotiate lower interest rates and fees, and improve credit score ratings. Select one of the boxes to indicate whether credit counseling services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E031	Hours of credit counseling required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E032	How was credit counseling provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E033	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by credit counseling services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Cash Assistance</b>		
AFI-E034	Does this project offer cash assistance to AFI IDA holders?	Cash assistance refers to funds given to individuals or families that do not need to be repaid. Select one of the boxes to indicate whether cash assistance was offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E035	How was cash assistance provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E036	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by cash assistance from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Loans</b>		
AFI-E037	Does this project offer loans to AFI IDA holders?	Loans refer to funds given to individuals or families that do need to be repaid, with or without interest. Select one of the boxes to indicate whether loans were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E038	How were loans provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E039	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by loans from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Peer Support</b>		
AFI-E040	Does this project offer peer support to AFI IDA holders?	Peer support may be provided in a number of ways such as discussion groups and list servs. For the purposes of the AFI program, peer support is defined as a formalized approach on the part of the grantee to facilitate communication among participants in order to share knowledge about shared challenges and experiences within the program. Select one of the boxes to indicate whether peer support services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E041	Hours of peer support required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E042	How was peer support provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E043	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by peer support services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
<b>Mentoring</b>		
AFI-E044	Does this project offer mentoring services to AFI IDA holders?	Mentoring is a one-to-one relationship in which an experienced person is identified to counsel and assist an AFI IDA holder to develop specific skills and knowledge that will enhance participant's personal ability to become self-sufficient. Select one of the boxes to indicate whether mentoring services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E045	Hours of mentoring required by project	Enter the number of hours of this service of mentoring your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E046	How was mentoring provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E047	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by mentoring services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.

Case Management		
AFI-E048	Does this project offer case management services to AFI IDA holders?	Case management is the coordination of multiple social services by a designated professional responsible for assessing IDA needs and implementing plans of coordinated, ongoing care or support services such as housing, employment, social relationships, and community participation. Select one of the boxes to indicate whether case management services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E049	Hours of case management required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E050	How was case management provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E051	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by case management services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Employment Support		
AFI-E052	Does this project offer employment support to AFI IDA holders?	Employment support includes services that help an individual become and stay employed. Select one of the boxes to indicate whether employment support services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E053	Hours of employment support required by project	Enter the number of hours of this service your organization requires AFI IDA holders to complete. Enter 0 if your organization provides services but has not established a participation requirement. Enter <i>NA</i> if your organization does not offer this service.
AFI-E054	How was employment support provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E055	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by employment support services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Child Care		
AFI-E056	Does this project offer child care to AFI IDA holders?	Child care refers to services to take care of children. Select one of the boxes to indicate whether child care services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E057	How was child care provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E058	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by child care services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Transportation		
AFI-E059	Does this project offer transportation to AFI IDA holders?	Transportation refers to services to help transport individuals. Select one of the boxes to indicate whether child care services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E060	How was transportation provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E061	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by transportation services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Medical Treatment		
AFI-E062	Does this project offer medical treatment to AFI IDA holders?	Medical treatment refers to medical treatment provided to individuals. Select one of the boxes to indicate whether medical treatment was offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E063	How was medical treatment provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E064	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by medical treatment from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.
Crisis Management		
AFI-E065	Does this project offer crisis management services to AFI IDA holders?	Crisis management refers to services provided to individuals or families to cope with sudden and/or significant negative events. Select one of the boxes to indicate whether crisis management services were offered to AFI IDA holders. If the AFI project did not offer this particular service, check <i>No</i> .
AFI-E066	How was crisis management provided?	Select whether the service was provided by the grantee, was outsourced, or both.
AFI-E067	Total number of unique AFI IDA holders served with this service offering	Enter the cumulative number of <b>unduplicated</b> AFI IDA holders who have been served by crisis management services from date of award until the end of this reporting period. Enter <i>NA</i> if your organization does not offer this service.

## Instructions for AFI PPR Section F

[Link to AFI PPR Long Form – Section F](#)

### Participant Demographics at the Time of Enrollment

Item	Data Element	Instructions / Description	
		A-All IDA Holders	B-IDA Holders Who Made Asset Purchase
AFI-F001 a, b	IDA Holder Gender – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F002 a, b	IDA Holder Race – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F003 a, b	IDA Holder Ethnicity – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F004 a, b	IDA Holder Age – Unduplicated number of AFI IDA Holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F005 a, b	Marital Status – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F006 a, b	Educational Attainment – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F007 a, b	Employment – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F008 a, b	Location – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period. <ul style="list-style-type: none"> <li>•Major urban area (Metropolitan Statistical Area with population greater than 1,000,000)</li> <li>•Minor urban area (Metropolitan Statistical Area with population less than 1,000,000)</li> </ul>	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period. <ul style="list-style-type: none"> <li>•Major urban area (Metropolitan Statistical Area with population greater than 1,000,000)</li> <li>•Minor urban area (Metropolitan Statistical Area with population less than 1,000,000)</li> </ul>
AFI-F009 a, b	Auto Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F010 a, b	Home Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.

AFI-F011 a, b	Business Ownership – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F012 a, b	TANF Recipients – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F013 a, b	EITC Recipient – Unduplicated number of AFI IDA holders self-reported in each demographic category.	Enter the cumulative, unduplicated number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period.
AFI-F014 a, b	Banking – Number of AFI IDA holders self-reported in each demographic category. AFI IDA holders may be counted more than once in this category.	Enter the cumulative number of AFI IDA holders for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period. <b>In this category, AFI IDA holders may be counted more than once.</b>	Enter the cumulative number of AFI IDA asset purchasers for each self-reported demographic category at time of enrollment from date of award through last day of this reporting period. <b>In this category, AFI IDA holders may be counted more than once.</b>
<b>Household Size, Composition and Income</b>			
<b>Item</b>	<b>Data Element</b>	<b>Instructions / Description</b>	
		<b>A-All IDA Holders</b>	<b>B-IDA Holders Who Made Asset</b>
AFI-F015 a, b	Total Household size – ‘Household’ means all individuals who share use of a dwelling unit as primary quarters for living and eating separate from other individuals.	Enter the cumulative, unduplicated number of AFI IDA holders in each household size category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>	Enter the cumulative, unduplicated number of AFI IDA asset purchasers in each household size category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>
AFI-F016 a, b	Household Composition – Adults Number of persons age 18 and older in the household at the time of enrollment. Please include the account holder in the count.	Enter the cumulative, unduplicated number of AFI IDA holders in each household adult composition category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>	Enter the cumulative, unduplicated number of AFI IDA asset purchasers in each household adult composition category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>
AFI-F017 a, b	Household Composition – Children Number of children (younger than age 18) in the AFI IDA holder household, at the time of enrollment. Please include account holder in the count.	Enter the cumulative, unduplicated number of AFI IDA holders in each household children composition category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>	Enter the cumulative, unduplicated number of AFI IDA asset purchasers in each household children composition category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>
AFI-F018 a, b	Income Level – Indicate the number of AFI IDA holders who reported household earned income at each level using the federal poverty guidelines developed by HHS.	Enter the cumulative, unduplicated number of AFI IDA holders in each household earned income category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>	Enter the cumulative, unduplicated number of AFI IDA asset purchasers in each household earned income category at time of enrollment from date of award through last day of this reporting period. <b>Include the account holder in the count.</b>

## Instructions for AFI PPR Section G

[Link to AFI PPR Long Form – Section G](#)

### Participant Demographics at the Time of Asset Purchase

Item	Data Element	Instructions / Description
AFI-G001	Educational Attainment – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of asset purchase from date of award through last day of this reporting period.
AFI-G002	Home Ownership – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of asset purchase from date of award through last day of this reporting period.
AFI-G003	Business Ownership – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of asset purchase from date of award through last day of this reporting period.
AFI-G004	TANF Recipients – Unduplicated number of AFI IDA asset purchasers self-reported in each demographic category at time of asset purchase.	Enter the cumulative, unduplicated number of AFI IDA asset purchasers for each self-reported demographic category at time of asset purchase from date of award through last day of this reporting period.

## Instructions for AFI PPR Section H

[Link to AFI PPR Long Form – Section H](#)

### Project and Participant Funds

#### Financial Institutions Holding AFI Participant IDAs

Item	Data Element	Instructions / Description
AFI-H001a	Institution name	Enter the name of financial institution in which participant IDA accounts are held.
AFI-H001b	Institution address	Enter the address of financial institution in which participant IDA accounts are held.
AFI-H001c	Number of AFI IDAs open at end of reporting period	Enter the number of AFI IDAs open at the identified institution as of the last day of this reporting period.
AFI-H001d	Savings amount on deposit at end of reporting period	Enter the combined current savings balances of all AFI IDA accounts open at the identified institution as of the last day of this reporting period. Balances should reflect all deposits minus all withdrawals. <i>Include only amounts deposited by participants into these accounts. Do not include any matching funds deposited by your program.</i>
AFI-H001e	Account type	Click the appropriate box to indicate whether AFI IDAs at the named institution are interest bearing or non-interest bearing.
	Repeat fields A, B, C, D, and E above for each additional institution.	
AFI-H002	Total number of institutions	Sum AFI-H001a entries. (Potential for auto-calculation).
AFI-H003	Total number of open AFI IDAs	Sum AFI-H001c entries. (Potential for auto-calculation).
AFI-H004	Total amount of savings on deposit in AFI IDAs	Sum AFI-H001d entries. (Potential for auto-calculation).

#### AFI Project Funds

AFI-H005	Total amount of required non-federal funds for this project received by the grantee	Enter the total amount of required non-federal funds for this grant on hand (e.g. deposited in the Reserve Fund and in parallel accounts/IDAs as matching contributions) and/or expended as of the reporting period end date. NOTE: Do not include non-federal cash in excess of the amount required for this grant. Do not include the value of any in-kind contributions to the project.
AFI-H006	Total amount of federal AFI funds expended for allowable project costs other than participant match	Enter the total amount of federal AFI funds expended for allowable project costs other than participant match from award date through the final day of this reporting period.
AFI-H007	Total amount of non-federal funds expended for allowable project costs other than participant match	Enter the total amount of non-federal funds expended for allowable project costs other than participant match from award date through the final day of this reporting period.
AFI-H008	Total amount of interest earned on account(s) holding AFI and non-federal funds	If applicable, enter the total amount of interest earned on account(s) holding AFI and non-federal funds from award date through the final day this reporting period.

#### Status of Qualified Financial Institution Partners That Hold AFI Project Reserve Funds

The AFI project reserve fund is a project-wide account maintained by the grantee and/or project partner (s). Please note that this section does not include information on individual participant IDAs. This data is collected above. *Space is provided for up to 5 institutions. Grantees may duplicate lines or sections as necessary.*

Item	Data Element	Instructions
AFI-H009a	Institution name	Enter the name of financial institution where the grantee organization holds any portion of the AFI project reserve fund.
AFI-H009b	Institution address	Enter the address of financial institution where the grantee organization holds any portion of the AFI project reserve fund.
AFI-H009c	Funds on deposit at end of reporting period	Enter the balances of account(s) open at the identified institution as of the last day of this reporting period. This includes both federal AFI funds and non-federal cash deposited into the reserve account.
AFI-H009d	Account type	Click the appropriate box to indicate whether the account at the named institution is interest bearing or non-interest bearing.
	Repeat fields A, B, C, and D above for each additional institution.	
AFI-H010	Total number of institutions	Sum AFI-H009a entries. (Potential for auto-calculation).
AFI-H011	Total amount of project funds on deposit	Sum AFI-H009c entries. (Potential for auto-calculation).

## Proposed AFI PPR Short Form

[Link to PPR Short Form Instructions](#)

1. Federal Agency and Organization Element to Which Report is Submitted	2. Federal Grant or Other Identifying Number Assigned by Federal Agency	3a. DUNS Number
		3b. EIN
4. Recipient Organization (Name and complete address including zip code)		5. Recipient Identifying Number or Account Number
6. Project/Grant Period Start Date: <i>(Month, Day, Year)</i>	End Date: <i>(Month, Day, Year)</i>	7. Reporting Period End Date <i>(Month, Day, Year)</i>
		8. Final Report? <input type="checkbox"/> Yes <input type="checkbox"/> No
		9. Report Frequency <input type="checkbox"/> Annual <input type="checkbox"/> Semi-annual <input type="checkbox"/> Quarterly <input type="checkbox"/> Other
10. Performance Narrative		
<b>11. Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.</b>		
11a. Typed or Printed Name and Title of Authorized Certifying Official		11c. Telephone <i>(area code, number and extension)</i>
		11d. Email Address
11b. Signature of Authorized Certifying Official		11e. Date Report Submitted <i>(Month, Day, Year)</i>
		12. Agency use only

The Short Form consists of select questions from the Long Form as indicated by the item numbers.

AFI PPR Short Form Account Activity Information		
Item	-IDA Account Activity	
AFI-D005	Total number AFI IDAs opened from the date of award through the last day of this reporting period	
AFI-D006	Total number AFI IDAs currently open	
AFI-D007	Total amount AFI IDA savings deposits from date of award through the last day of this reporting period	
AFI-D008	Total balance amount in AFI IDAs open on last day of this reporting period	
AFI-D011	Total number AFI IDAs closed from date of award through the last day of this reporting period	
AFI-D016	Total number AFI IDA holders making withdrawals for asset purchase	
AFI-D018	Total amount of AFI IDA savings withdrawn from an AFI IDA for an asset purchase	
AFI-D019	Total amount of federal AFI grant funds disbursed as matching funds for an asset purchase	
AFI-D020	Total amount of non-federal cash disbursed as matching funds for an asset purchase	
AFI-D041	Total AFI IDA savings withdrawn with no match	

## Proposed Instructions for AFI PPR Short Form

[Link to AFI PPR Short Form](#)

Instructions for AFI PPR Short Form Cover Page		
Item	Data Element	Instructions / Description
1	Federal Agency and Organization Element to Which Report is Submitted	Enter HHS/ACF/OCS.
2	Grant Number Assigned by Federal Agency	Enter the AFI grant number (Box 3 on Notice of Award). The grant number is in the format: 90EIXXXX. Grantees with multiple AFI awards must submit separate reports for each grant award.
3a	DUNS Number	Enter the grantee organization's DUNS number. (Data Universal Numbering System) or its Central Contract Registry extended DUNS number (listed in Box 25 on Notice of Award).
3b	EIN	Enter the grantee's Employer Identification number (EIN) (Box 22 on Notice of Award).
4	Recipient Organization	Enter the grantee organization name and complete address (Box 11 on Notice of Award).
5	Recipient Identifying Number or Account Number	Optional. Enter the account or other identifying number that the grantee has assigned to the award reported on this form.
6	Project/Grant Period	Enter the beginning and end dates of the five-year project period for the grant (Box 9 on Notice of Award). If ACF has approved a 12-month no-cost extension, the new end date is shown in Box 9 of the revised Notice of Award provided with the notification that the no-cost extension was approved.
7	Reporting Period End Date	Enter the reporting period end date.
8	Final Report	Select Yes if this is the final report for the grant. The final AFI PPR is due 90 days after the grant ends, like the final Federal Financial Report (SF-425). Regardless of when the grant ends, the final AFI PPR will always be a long form report.
9	Report Frequency	Select "Quarterly."
10	Performance Narrative	Optional.
11	Certification	
11a	Typed or Printed Name and Title of Authorized Official	Enter the name and title of the authorized official (AO). Box 11 of the Notice of Award should list the AO for the grant.
11b	Signature of Authorized Official	Signature of the grantee's authorized official.
11c	Telephone	Enter the telephone number (area code and extension) of the authorized official.
11d	Email Address	Enter the email address of the authorized official.
11e	Date Report Submitted	Enter the date the report is submitted. Use a month, day, year format: MM/DD/YYYY.
12	Agency use only	This field is for agency use only.

Instructions for AFI PPR Short Form Account Activity Information		
Item	Data Element	Instructions / Description
AFI-D005	Total number AFI IDAs opened from the date of award through the last day of this reporting period	Enter the number of IDAs opened from the date of award through the end of this reporting period. Include accounts transferred to this AFI IDA project from another AFI IDA project.
AFI-D006	Total number AFI IDAs currently open	Enter the number AFI IDAs open as of the last day of this reporting period.
AFI-D007	Total amount AFI IDA savings deposits from date of award through the last day of this reporting period	Enter the amount of savings that participants deposited into AFI IDAs from date of award through the end of this reporting period.
AFI-D008	Total balance amount in AFI IDAs open on last day of this reporting period	Enter the amount of balances in AFI IDAs on deposit as of the last day of this reporting period.
AFI-D011	Total number AFI IDAs closed from date of award through the last day of this reporting period	Enter the number of AFI IDAs closed from the date of award through the last day of this reporting period. This includes IDAs closed for any reason (receiving or not receiving match funds).
AFI-D016	Total number AFI IDA holders making withdrawals for asset purchase	Enter the number of AFI IDA holders making withdrawals for asset purchase from date of award through the last day of this reporting period.
AFI-D018	Total amount of AFI IDA savings withdrawn from an AFI IDA for an asset purchase	Enter the amount of AFI IDA savings withdrawn for authorized asset purchases from date of award through the last day of this reporting period.
AFI-D019	Total amount of federal AFI grant funds disbursed as matching funds for an asset purchase	Enter the amount of federal AFI grant funds disbursed as matching funds for authorized asset purchases from date of award through the last day of this reporting period.
AFI-D020	Total amount of non-federal cash disbursed as matching funds for an asset purchase	Enter the amount of non-federal cash disbursed as matching funds for authorized asset purchases from date of award through the last day of this reporting period.
AFI-D041	Total AFI IDA savings withdrawn with no match	Enter the amount of AFI IDA savings withdrawn with no match funds disbursed from date of award through the last day of this reporting period.