



# Submitting Your AFI PPRs in OLDC

August 2016



# Agenda

- How to Access OLDC
- Report Reminders
- Navigating to Your AFI PPR in OLDC
- Navigating within Your AFI PPR
- Editing AFI PPR Long Form Sections
- Submitting the PPR
- Where to Ask Questions



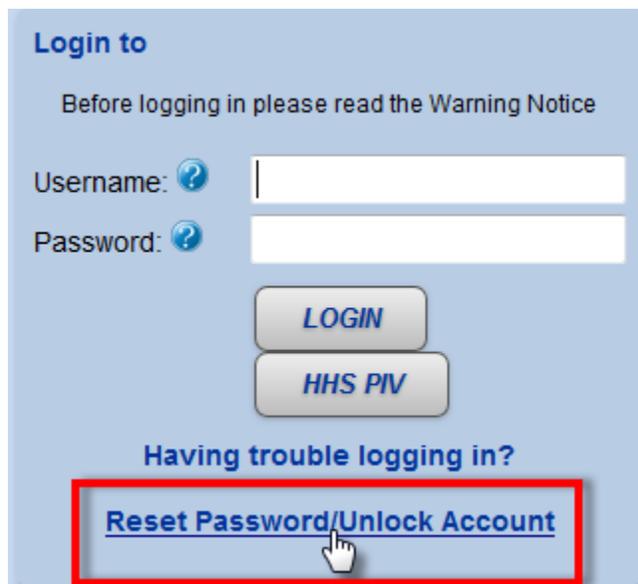
# **How to Access the Online Data Collection System (OLDC)**



## OLDC access set up by the AFI Resource Center

- In May 2016, the AFI Resource Center requested grantees provide a contact for the PPR Long Form
  - OLDC accounts were set up in early July for grantees that provided a contact
- For grantees who did not respond, the AFI Resource Center is reaching out directly to confirm and then will set up the account

## If you ever need your password reset



**Login to**

Before logging in please read the Warning Notice

Username:

Password:

**LOGIN**

**HHS PIV**

Having trouble logging in?

[Reset Password/Unlock Account](#)

- Use the reset option on the GrantSolutions login screen

Starting August 15, 2016:

# Log-in to OLDC through GrantSolutions

<https://grantsolutions.gov>



The screenshot shows the top portion of a website. At the top left is a logo of a stylized eagle. To its right is the text "THE GRANTS CENTER of EXCELLENCE". Further right is the "GRANTSOLUTIONS.GOV" logo with the tagline "Linking Services, Solutions, Communities". Below this is a horizontal navigation bar with seven items: "HOME", "BENEFITS", "PRODUCTS", "PARTNERS", "SUPPORT", "ABOUT", and "NEWS". Below the navigation bar, the text "The Grants Center of Excellence" is displayed, followed by a partial sentence: "The Grants Center of Excellence (COE) delivers end-to-end grants management products and". To the right of this text is a blue button labeled "Login to GrantSolutions", which is pointed to by a red arrow.

# Logging in to GrantSolutions <https://grantsolutions.gov>

Login to

Before logging in please read the Warning Notice

Username: ?

Password: ?

**LOGIN**

**HHS PIV**

Having trouble logging in?  
[Reset Password/Unlock Account](#)

On August 15, 2016:

## **If you already had a GrantSolutions account**

Login to with your GrantSolutions username and password

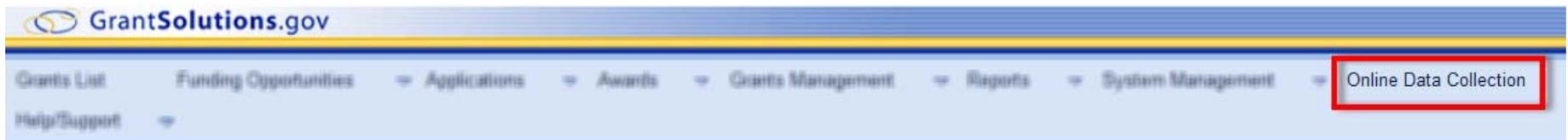
## **If you only had an OLDC account**

Login to with your OLDC username and password

## Navigate to OLDC

In the top menu bar, click on “Online Data Collection” or “OLDC” depending on your account type.

*If you also have a GrantSolutions account, it will look like this:  
(The first time you click Online Data Collection, it will prompt you to link your accounts.)*



*If you only have an OLDC account, it will look like this:*





# Report Reminders



## Reminders

- Most of the data in the AFI PPR is for **cumulative data**. Unless noted for a specific field, you should be reporting data that is cumulative from the start of the grant through the end of the specified reporting period.
- Save often!



# Navigating to Your AFI PPR

[PDF instructions with screenshots are also available on the AFI Resource Center.](#)

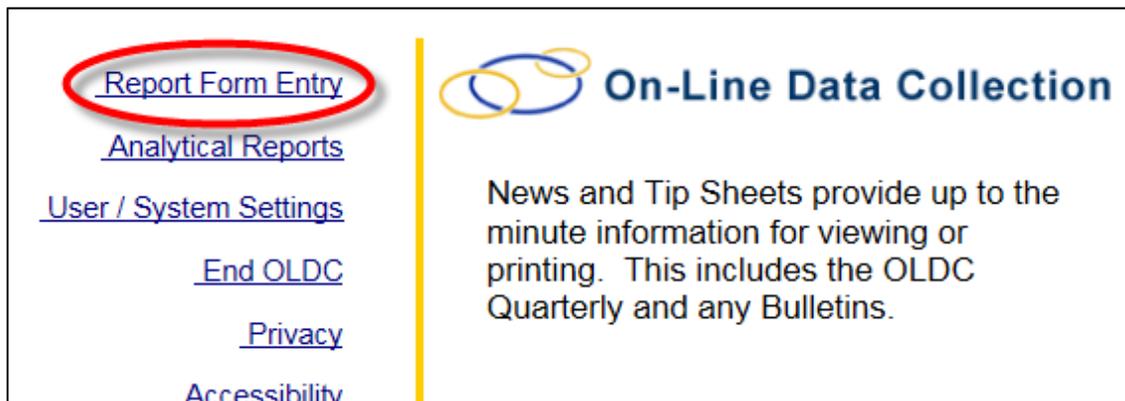


## Navigating to PPR, Steps 1 - 3

1. Login to OLDC through GrantSolutions: <https://grantsolutions.gov>
2. In the top menu bar, click on “Online Data Collection”



3. In OLDC, Click on “Report Form Entry”



## Navigating to PPR, Step 4: Form Selection Screen

- 4a. Program Name: Assets for Independence Demonstration
- 4b. Grantee Name: Select your grantee name  
*\*If there is more than one, select the one with the most recent grant period*
- 4c. Report Name: Performance Progress Report (AFI PPR)

**Form Selection**

Please use the drop-down lists below to make selections. Steps must be completed in order.

Step 1: Program Name:

Step 2: Grantee Name:

Step 3: Report Name:

## Navigating to PPR, Step 4: Form Selection Screen

- 4d. Funding / Grant Period: Select the grant
- 4e. Report Period: Select the reporting period for the report
  - \***Long Forms** are marked “Annual”
  - \***Not Yet Available: Short Forms** are marked “Quarterly”
  - \***If submitting PPRs for more than one AFI grant, you will need to come back and repeat this step for each grant**
- 4f. Select Action: New / Edit / Revise Report
- 4g. Click “Enter”

Step 4: Funding / Grant Period: 06/01/2011 - 05/31/2016 EI (90EI00004)

Step 5: Report Period:

	Reporting Period	Type	Report Status
<input type="radio"/>	06/01/2011 - 05/31/2016	Grant	
<input type="radio"/>	04/01/2016 - 05/31/2016	Quarterly	
<input type="radio"/>	01/01/2016 - 03/31/2016	Quarterly	
<input type="radio"/>	10/01/2015 - 12/31/2015	Quarterly	
<input checked="" type="radio"/>	10/01/2014 - 09/30/2015	Annual	Saved
<input type="radio"/>	04/01/2015 - 06/30/2015	Quarterly	
<input type="radio"/>	01/01/2015 - 03/31/2015	Quarterly	
<input type="radio"/>	06/01/2011 - 12/31/2014	Quarterly	

Step 6: Select Action: New / Edit / Revise Report

Enter

# Navigating to PPR, Step 5: You're There!

Click "Report Sections" at anytime to return to this screen.

To enter a section, under the Perform Action column, select "Edit Section," and then select "Go."

OLDC Home   Form Selection   **Report Sections**   Report Form Status

### Report Sections

Program Name: ASSETS FOR INDEPENDENCE DEMONSTRATION  
Grantee Name: 06/01/2011 - 05/31/2016 EI (90EI0004)  
Report Name: AFI PPR  
Funding/Grant Period: 06/01/2011 - 05/31/2016 EI (90EI0004)  
Report Period: 10/01/2014 - 09/30/2015

This table displays the sections of the report form and the status of each. Return to this screen to Validate, Certify, or Submit.

Certain report form sections accept user-defined section names. These sections are indicated by data-entry fields in the "Section Name" column. The new screen name will be appended to the default screen name by typing in the custom name and pressing the "Save Section Names" button.

Selections in the dropdown lists may include:

- Create Section - Indicated by an asterisk (\*), copies that section and creates a new blank section.
- Clear Section Data - Deletes all data saved for that section.
- Delete Section - Permanently deletes that section and data.
- Edit Section - Opens the form section in a data-entry version.
- Print Section - Opens a new browser window with the report in a print-friendly version.

[View/Add Attachments](#)   [Validate](#)   [Save Section Names](#)   [Print Full Report](#)

Section Name:	Perform Action:	Section Status:
AFI PPR Long Form Cover Page	<b>Edit Section</b> <input type="button" value="Go"/>	<b>Saved -- Validated</b>
AFI PPR Section A - Project Information and Administration	Select Action: <input type="button" value="Go"/>	<b>Saved -- Validated</b>
* AFI PPR Section B - Individual Development Account Design. Type A	Select Action: <input type="button" value="Go"/>	<b>Saved -- Validated</b>
* AFI PPR Section B - Individual Development Account Design. Type B	Select Action: <input type="button" value="Go"/>	<b>Initialized</b>
AFI PPR Section C - AFI IDA Holder Account Activity	Select Action: <input type="button" value="Go"/>	<b>Saved -- with Errors</b>
AFI PPR Section D - Training, Services And Assistance Offered for AFI IDA Holders	Select Action: <input type="button" value="Go"/>	<b>Saved -- Validated</b>
AFI PPR Section E - AFI IDA holder Demographics at the Time of Enrollment	Select Action: <input type="button" value="Go"/>	<b>Saved</b>
AFI PPR Section F - AFI IDA Holder Demographics at the Time of Final Matched Withdrawal	Select Action: <input type="button" value="Go"/>	<b>Saved -- Validated</b>

[View/Add Attachments](#)   [Validate](#)   [Save Section Names](#)   [Print Full Report](#)



# **Navigating Within Your AFI PPR**



## Header and Report Progress Bar

- At the top of each **section** page, you will see a header with information on the grant and report you are filling out. Especially for those with multiple reports, this will be a good way to confirm you are in the report you intend to be.
- Also on each section page is the Report Progress bar which will quickly tell you where you are in the steps to submitting your report.

The screenshot displays a report progress bar and a header information box. The header box contains the following details:

- Program Name: ASSETS FOR INDEPENDENCE DEMONSTRATION
- Grantee Name: Arcata Economic Development Corporation - No. 50
- Report Name: AFI PPR
- Funding/Grant Period: 06/01/2011 - 05/31/2016 EI (90EI0684)
- Report Period: 10/01/2013 - 09/30/2014
- Report Status: Initialized
- Section Status: Initialized

The Report Progress bar is titled "Report Progress" and shows seven stages: **Initialized**, Edit-Saved, Validated, Certified, Submitted, In Review, and C/O Approved. The "Initialized" stage is highlighted in dark blue and contains a green checkmark icon. The other stages are represented by light blue boxes with empty square icons. Below the progress bar are five buttons: "Previous Section", "Save", "View/Add Attachments", "Validate", and "Next Section".

# Navigation Buttons

## Navigation Buttons – on main Report Sections screen

**View/Add Attachments**

Click to view any attachments you have added.

**Validate**

Click to verify if the data you entered satisfies rules in the form. All sections will need to be validated before you can submit the form.

**Print Full Report**

Click to print or save a version of the report for your records.

## Navigation Buttons – on section screens

**Previous Section**

Moves you to the previous section of the report. *Save first.*

**Save**

**Click to save. Save your report often to prevent losing data!**

**View/Add Attachments**

Brings you to a screen showing any attachments you added to the report. *Save first.*

**Validate**

Click to verify if the data you entered satisfies rules in the form. All sections will need to be validated before you can submit the form.

**Next Section**

Moves you to the next section of the report. *Save first.*

# Section Status

<u>Section Status:</u>
<b>Saved -- Validated</b>
<b>Saved -- Validated</b>
<b>Saved -- Validated</b>
<b>Saved</b>
<b>Saved -- Validated</b>
<b>Saved -- with Errors</b>
<b>Validated - with Warnings</b>

## Section Status – on main Report Sections screen

Saved	The section is saved, but not yet validated.
Saved -- Validated	The section is validated and has no errors.
Validated -- with Warnings	The section is saved and validated and there are some warnings. However, these warning are allowable and the report may still be submitted.
Saved with Errors	An error message appears at the top of the form. Reports with errors cannot be certified and have the status “Saved with Errors”. Errors must be corrected.

# Field Instructions

## Field Instructions

For further instructions on what a field is asking you to enter, click on the data element name and instructions will appear in a pop-up box.

NOTE: For the fields below, report only on project partners that independently open and administer AFI IDAs, not on project partners that are sub-grantees or sub-recipients of the grant. The project partners are often called sub-grantees or sub-recipients.

Item	Data Element
AFI-A012	<a href="#">Number of project partners who open AFI IDAs.</a>
AFI-A013	<a href="#">Names of project partner organization(s).</a>

[Previous Section](#) [Save](#) [View](#)

Message from webpage



Upload a Word, Excel, or PDF file that lists the full name project partners that independently open and administer AFI IDAs, acronyms will not be accepted. The number of partners on that list must be the same as the number reported in AFI-A012. Documents that include project partners' contact information are preferred, but not required. If you entered 0 in AFI-A012, do not upload a file.

OK

## Prior Year's Data

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

- If you reported in FY 2014, the FY 2015 PPR Long Form “Prior Report Data” fields will be pre-populated with key data points from your 2014 report.
- Going forward, if you completed a prior year's PPR Long Form for a grant, all “Prior Report Data” fields will be populated.

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



# Editing AFI PPR Long Form Sections

[PDF instructions with screenshots are also available on the AFI Resource Center.](#)



# Long Form Cover Page

This section is **not editable**. If you see errors, please contact the AFI Resource Center.

You may upload an *optional* performance narrative in field 10 by clicking the paperclip icon.

Narrative templates, one for the [PPR Long Form](#), and one for the [PPR Short Form](#) are available on the AFI Resource Center website.

<b>U.S. DEPARTMENT OF HEALTH and HUMAN SERVICES</b> Administration on Children, Youth and Families Assets for Independence		OMB Clearance No.: 0970-XXXX Expiration Date: XX/XX/20XX	
<b>PERFORMANCE PROGRESS REPORT(AFI PPR)</b> <b>Cover Page</b>			
<b>1. Federal Agency and Organization Element to Which Report is Submitted</b> Office of Community Services		<b>2. Federal Grant or Other Identifying Number Assigned by Federal Agency</b> 90EI0684	
		<b>3a. DUNS Number</b> 061310330	
		<b>3b. EIN</b> 1942674882A1	
<b>4. Recipient Organization</b> CA - Arcata Economic Development Corporation		<b>5. Optional: Recipient Identifying Number or Account Number</b> 123456789	
<b>4a. Address Line 1</b> 100 Ericson Ct Ste 100A			
<b>4b. Address Line 2</b>			
<b>4c. Address Line 3</b>			
<b>4d. City</b> Arcata	<b>4e. State</b> CA	<b>4f. Zip Code</b> 95521 <b>Zip Ext.</b> 8922	
<b>6. Project/Grant Period</b>		<b>7. Reporting Period End Date:</b> 09/29/2015	
<b>6a. Start Date:</b> 06/01/2011	<b>6b. End Date:</b> 05/31/2016	<b>8. Final Report?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	
		<b>9. Report Frequency</b> <input type="radio"/> Annual <input type="radio"/> Quarterly	
<b>10. Performance Narrative ( Attach a performance narrative as instructed by the awarding Federal Agency )</b> 			
<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>			
<b>11a. Typed or Printed Name and Title of Authorized Certifying Official</b>		<b>11c. Telephone (area code, number and extension)</b>	
		<b>11d. Email Address</b>	
<b>11b. Signature of Authorized Certifying Official</b>		<b>11e. Date Report Submitted (Month, Day, Year)</b>	

# Section A – Project Information and Administration

## Field: A006

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

Add Section A - ANOTHER NON-FEDERAL CASH SOURCE 1

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

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

If you need to delete a row:

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

## Section A – Project Information and Administration

### Field: A012 and A013

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

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

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

## Section B – IDA Design

### Fill out once, or more than once?

Fill out **one** Section B:

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

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

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

## Section B – IDA Design

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

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

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

**Section C – AFI IDA Holder Account Activity**

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

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

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

For each of these sections:

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

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



# Submitting the PPR



# Submitting the PPR

## Certify

After a report form has been successfully saved and validated, a person with the appropriate role can certify the report form with a digital signature. *If it appears you cannot submit the form, please contact the AFI Resource Center.*

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

# Submitting the PPR

## Submit

When the form is electronically signed, it displays a Certified status. An Uncertify button is available in case there is a need to return to the report for editing. The report form is now ready to be submitted. Only a person with the role “Submit” has the Submit button.

1. Click “Submit” to officially send the report to HHS
2. The following message will appear: “This will officially submit your report to ACF. Do you wish to continue.” Click “OK.”
3. The “Report Form Status” screen will appear along with the message “We have received your report. This page shows all reports we have received along with attachments.” Click “OK.”

# Submitting the PPR

## Revision

Once a report has been approved by AFI, you may submit a revision. The revision is duplicated from the original submission. The revision number is shown in the information box in the Report Name. The original report is retained for historical purposes and may be accessed from the “Report Form Status” page.

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

## If You Have Questions...



- For questions related to completing the PPR Long-Form, call or email the AFI Resource Center.

AFI Resource Center  
Hours of Operation:  
Monday – Friday, 9:00 a.m. to 5:00 p.m. EST

Email: [info@idaresources.org](mailto:info@idaresources.org)  
Phone: 1-866-778-6037

- For questions related to grants management or policy, please ask for your AFI Program Specialist.