



Submitting Your AFI PPRs in OLDC August 2016

Hello and welcome to the AFI Resource Center webinar, "Submitting Your AFI PPRs in OLDC."

Our agenda for this webinar includes:

- 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
- And Where to Ask Questions

I'll now talk about how to access the Online Data Collection system, or OLDC, which is the online system where the new AFI PPRs will be submitted.

At this time, the AFI Resource Center handles setting up OLDC access for all AFI grantees.

For the fiscal year 2015 AFI PPR Long Form, the first AFI report submitted in OLDC, the AFI Resource Center asked grantees to provide a contact for the report at the end of May 2016. On July 6 and 7 the AFI Resource Center created OLDC accounts for those grantees that provided a contact. When the accounts were created, contacts received two system-generated emails from OLDC with your user name and temporary password.

For grantees who did not respond, the AFI Resource Center is reaching out directly to confirm primary data contacts. Please respond as soon as possible so as not to delay getting access to OLDC.

If you need your password reset, use the reset password / unlock account option on the GrantSolutions login screen.

The majority of AFI grantees were given OLDC accounts in July 2016. However, the Grants Center of Excellence instituted changes to streamline accounts and now all users will login to OLDC through GrantSolutions. To log in, users should go to <https://grantsolutions.gov> and click on the "Login to GrantSolutions" button.

After you click on the button, a screen with a login box will appear. The following is very important – the username and password you use depends on if you did or did not have a GrantSolutions account before August 15, 2016 when the login process changed.

If you already had a GrantSolutions account, login with your GrantSolutions username and password.

If you *only* had an OLDC account, login with your OLDC username and password.

If you also have a GrantSolutions account, your screen will look similar to the first screenshot and you will click on the link for Online Data Collection in the top menu bar. The first time you click Online Data Collection, it will prompt you to link your accounts.

If you only have an OLDC account, your screen will look similar to the second screenshot and you will click on the link for OLDC in the top menu bar.

Now let's talk about report reminders.

Most of the data requested in the AFI PPR is **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 to avoid losing data you have entered.

Now we will go through the steps to navigate to your AFI PPR in OLDC. These instructions, with screenshots, are also available in a PDF on the AFI Resource Center website.

Navigating to the PPR is very easy.

Login to OLDC: <https://grantsolutions.gov>

The username and password you will use depends on whether or not you had a GrantSolutions account prior to August 15, 2016 when the login process changed.

If you had a GrantSolutions account prior to August 15, 2016, use your GrantSolutions username and password to log in.

If you had only an OLDC account prior to August 15, 2016, use your OLDC username and password to log in.

In the top menu bar, click on "Online Data Collection"

If you also have a GrantSolutions account, the link will say Online Data Collection.

If you only have an OLDC account, the link will say OLDC.

In OLDC, Click on "Report Form Entry"

For the Program Name, select Assets for Independence Demonstration.

For the Grantee Name, select your grantee name. If there is more than one, select the one with the most recent grant period.

For the Report Name, select Performance Progress Report (AFI PPR)

For the Funding / Grant Period, select the grant. If you have more than one AFI grant, make sure that you select the grant that corresponds to the data that you are entering. You will also need to come back and repeat this step for each grant

For the Report Period, select the report that you are going to be working on by clicking on the circle on the left side of the reporting period for that report.

select the reporting period for the report.

**Note that the reports are listed in reverse chronological order, with the earliest reports at the bottom and the Final report at the top.*

OLDC automatically creates reports based on grant periods. There will be several reports listed that **are not required for AFI grantees in the transition to the new AFI PPR. OLDC should not allow you to open these reports. These reports are marked in the image onscreen with a no sign.*

There are two ways tell what kind of PPR a report is: Reporting Period & Type.

*-If the Reporting Period is a full year and the Type is Annual, the report will be the AFI PPR **long form**.*

*-If the Reporting Period is three months and the Type is Quarterly, the report will be the AFI PPR **short form**.*

*-If the Reporting Period is the full grant period and the Type is Grant(Final), the report will be the AFI PPR **long form**.*

Continuing with selecting the Report Period, double-check that you are selecting the correct report using the Reporting Period and Type.

The first three AFI PPRs are listed on this slide alongside the image from OLDC where they are marked with the same letter.

*A. FY 2015 Long Form (Due September 28, 2016):
Reporting Period - 10/01/2014 – 09/30/2015;
Type - Annual*

*B. FY 2016 Long Form (Due November 30, 2016):
Reporting Period - 10/01/2015 – 09/30/2016;
Type - Annual*

*C. FY 2017 Quarter 1 Short Form (Due January 30, 2017):
Reporting Period - 10/01/2016 – 12/31/2016;
Type - Quarterly*

For Select Action, select New / Edit / Revise Report
Then click the “Enter” button.

You are now on the Report Sections screen of your report.

Click “Report Sections” at any time to return to this screen.

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

You do not need to complete the sections in order, and you can enter data, save it, and come back later to enter more data.

Now let's talk about navigating within your AFI PPR.

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.

You will see these navigation buttons through the report.

The "View/Add Attachments" button can be used to see any attachment you have added to the report.

The "Validate" button is used to verify if the data you entered satisfies the rule in the form. All sections will need to be validated before you can submit the form.

The "Print Full Report" button will allow you to print or save a version of the report for your records.

The "Previous Section" button will move you to the section previous to the one you are in. Save before moving sections.

The "Save" button saves the report, please remember to save often!

The "Next Section" button will move you to the next section after the one you are in. Remember, save before moving sections.

On the main, Report Sections screen you will see a list of each section and the status for each.

The status "Saved" means the section is saved, but not yet validated.

The status "Saved – Validated" means the section is validated and has no errors.

The status "Validated – with Warnings" means the section is saved and validated, but with warnings. However, these warnings are allowable and the report may still be submitted.

The status "Saved with Errors" means there are errors in the section. The errors will appear at the top of the section, and need to be fixed or the report cannot be submitted.

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.

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.

Now we will go through the steps for editing section in the AFI PPR Long Form. These instructions, with screenshots, are also available in a PDF on the AFI Resource Center website.

The first section is the Long Form cover page.

Per government standards, 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.

AFI grantees may use these templates to clarify their AFI PPR data. Clarifying information is particularly helpful in response to warning messages on the AFI PPR data entry screens that ask grantees to provide an explanation in the narrative attachment.

AFI grantees may also use this narrative to provide additional details about their AFI grant that will help AFI program staff understand how the program operates, current successes, and current challenges.

Section A is for project information and administration.

Field A6 is for reporting the sources of non-federal cash for the grant. Create an additional A6 for *each* source of non-federal cash (A6 1, A6 2, etc). To do so, first select the number of rows you would like to add in the dropdown, then click "Add."

If you every need to delete a row, check the box to the right of the row, and then click "Delete Marked Rows."

Field A12 asks for the number of project partners for this grant – in this case, a project partner is an organization the independently opens and administers AFI IDAs for the grants.

If you reported there being one or more project partners, upload a Word, Excel, or PDF document in field A13 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 A12, do not upload a file in field A13.

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.

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 "Y" for [Yes] and another section with the same 16 questions will appear just below as type B, C, D, etc. Repeat as needed.

For sections C, D, E, and F:

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.

We will now talk about how to submit the PPR in OLDC after you have entered your data.

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.

To certify the report:

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.”

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.

To submit the PPR:

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.”

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.

To submit a revision:

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.

Please do not hesitate to contact the AFI Resource Center. Any one of our staff can help you with your questions. For questions related to grants management or policy, you will want to contact your AFI Resource Coordinator as they will be better able to answer your questions.

We want to thank you for joining today's webinar. We hope you have found it to be helpful in preparing you to complete the AFI PPR. If you have any questions about this webinar, please contact the AFI Resource Center at 1-866-778-6037. Thank you and have a great day!