Online Data Collection (OLDC) System: Register for Account and Access the CSBG Model State Plan

Office of Community Services:
CSBG Grantee Training

June 24, 2015
Agenda

– CSBG Model State Plan Background
– OLDC Introduction
– Register OLDC Accounts
– Username and Password
– Log In
– OLDC Home
  • Enhanced Home Page
– Verify Existing Permissions
– Access Reports
– Resources
CSBG MODEL STATE PLAN
BACKGROUND
New Model State Plan Overview

• Revised and automated CSBG Model State Plan
  – Incorporates the 3 performance management efforts
  – Accessed through ACF’s Online Data Collection System
  – Increases efficiency, improves data analysis

• OMB Clearance expected summer 2015

• New state plan used for applications due Sept. 1, 2015 (for FY 2016)
Progress to Date

• Fall 2014: Drafted new version of the CSBG Model State Plan in collaboration with state agency workgroup and NASCSP
• January 29, 2015: Published Draft CSBG Model State Plan
• January 26 – March 27: 60 Day Paperwork Reduction Act (PRA) comment period
  • 21 sets of comments submitted through the PRA system
  • Dozens of informal comments during 4 webinars and NASCSP Mid-Winter Conference
• May 20: Published revised CSBG Model State Plan
• May 22 – June 21: 30 day PRA comment period
• June 8: Recorded webinar on major revisions; on NASCSP website
The Homestretch

- Systems trainings on OLDC – *Webinar Series*
  - Registering/Accessing OLDC
  - *State Plan Data Entry in OLDC*

- Publication of FY 2016 state plan submission guidance

- Targeted outreach to 13 states on 2YR plans
CSBG Model State Plan Timeline

First Federal Register Notice
1/26/15

End of 60 day comment period
3/27/15

Second Federal Register Notice
5/22/15

End of 30 day comment period
6/21/15

States submit new automated State Plans
9/1/15

Available for FY 2016 applications (Online)

December 2014

Quarter 2

Quarter 3

Quarter 4

October 2015

OMB/PRA Clearance
OLDC INTRODUCTION
Introduction

- OLDC is a convenient web-based method for submitting report forms.
- Report forms can be submitted quickly over the Extranet (secure Internet site).
• OLDC is a role based system
  – Users may only perform actions if they have the necessary permissions

• Grantee **Job Types** (pre-defined group of roles) include:
  – **Data Entry** - Person responsible for entering grant report data into OLDC. The Data Entry Person is able to create and edit grant reports by default. Additional roles may be given, including Submit, and Unsubmit

  – **Authorized Official** - Person directly involved in reviewing and certifying the report form. An Authorized Official has the View-only and Certify roles by default. Additional roles such as Submit and Unsubmit may be assigned

  – **Grant Administrator** – May perform all the actions of the Data Entry person and the Authorized Official, including Submitting and Unsubmitting forms
REGISTER OLDC ACCOUNTS
Register OLDC Accounts

• Each individual that uses OLDC must have their own account
  – Do not share passwords!
Register OLDC Accounts – Access Form

• Complete the OLDC Access Request Form to:
  – Register a new account
  – Modify an existing account

**Tip:** If you are not able to perform an action in the system, you may not be assigned the necessary role. For example, the Submit role need to be assigned to someone for them to be able to officially submit a report to ACF.

By default, only the Grant Administrator Job Type has the roles Submit and Unsubmit.
Register OLDC Accounts – Access Form

- To request a new account or modify an existing account, go to:
  - https://extranet.acf.hhs.gov/oldcdocs/materials.html
  - Click the link OLDC Access Request Form
OLDC Accounts – Access Form

• Request for OLDC Access form
  – First page contains instructions and Job Type/Role descriptions
  – Second page contains the form to complete
• Request Form Instructions
  – **Program**: Community Services Block Grant
  – **Forms**: All
  – **Job Type**: Each state should have at least one user assigned to the following Job Types
    • Grant Administrator
    • Authorized Official
    • Data Entry Person
Register OLDC Accounts – Access Form

• Email completed forms no later than July 8, 2015 to Niki Frazier or LaToya Smith at:
  Nikita.Frazier@acf.hhs.gov
  or LaToya.Smith@acf.hhs.gov
USERNAME AND PASSWORD
Username and Password

- New usernames and passwords are sent via two e-mails from **On-Line_Data_Collection_System@acf.hhs.gov**
  - The first contains the Username and Security Policy
  - The second contains the OLDC Password

- If either e-mail is not received, please contact the support center
  - Phone: 1-866-577-0771
  - E-mail: **app_support@acf.hhs.gov**

Grantees already using OLDC to submit other forms do not receive new usernames and passwords. The new permissions are added to the existing accounts.
• Ensure spam blockers are not preventing receipt of usernames and passwords
• Please add the following email addresses to your safe list:
  – On-Line_Data_Collection_System@acf.hhs.gov
  – Secure_Sign-In_System@acf.hhs.gov
LOG IN
Log In

• Enter the secure web address in your browser’s **Address** line
  – Internet Explorer, Chrome, or Firefox
  [https://extranet.acf.hhs.gov/ssi/](https://extranet.acf.hhs.gov/ssi/)

• Save the web address as a Favorite for quick access
Log In

• The Secure Sign-In Login screen displays
• Enter your username and password, then click **Login**
Log In

- Change your password upon first logon
• Enter current password, a new password, and confirm new password
• Click the **Change Password** button
Log In

- Passwords must be changed every 420 days
  - A message prompts the user to change their password upon login
- If the password is not changed within the timeframe, the account is disabled for security purposes
  - Contact the Support Center to re-enable the account
Log In

- The “Change Challenge Question” screen displays. Select a Challenge Question and enter an Answer.
- Click the Save Q and A button.
Log In

- The Secure Sign-In (SSI) “Home” screen displays. At any time, you may do one of the following:
  - Select **Change Password** to change your password
  - Select **Change Challenge Question** to change your challenge question or answer
Log In

• From the SSI Home screen, click the OLDC

If OLDC does not open, you may have a pop-up blocker on your computer. Disable your browser’s pop-up blocker to open OLDC.
The OLDC “Home” screen displays...
• To change the Home page to the enhanced view, click the link **Switch Home Page (Enhanced)**
A message appears asking “Do you want to keep the enhanced OLDC home page as your default home page?”

– Click **Yes** to set the enhanced page as the new default each time OLDC is accessed.
– Click **No** to enable the enhanced home page at this time. However, the next time OLDC is access, the regular home screen appears.
• The new Home screen appears. To return to the regular Home screen view, click the link Switch Home Page (Regular)
OLDC Home

- The enhanced Home page is divided into two sections
  - Main Menu links
  - Tabs
OLDC Home: Main Menu Links

• Report Form Entry
  – Enter data
  – Retrieve previous or current data

• User/System Settings
  – Customize the way OLDC is used

• News & Tips
  – OLDC Documentation

• End OLDC
**My Recent Activity**: Displays all reports recently accessed by the user. Possible *Actions* include:

- **View**: View a report in read-only mode
- **Edit**: Access the “Report” screen in edit mode
- **Report Status**: Navigate to the “Report Form Status” page

![OLDC Home: Tabs](image)

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Grantee Name</th>
<th>Grant</th>
<th>Report Name</th>
<th>Reporting Period</th>
<th>Activity Date</th>
<th>Report Status</th>
<th>Actions</th>
</tr>
</thead>
</table>
- **Activity Report**: Search for reports in progress, submitted, or approved over the past two years. To access historical data, use the *Report Form Entry* link from the main menu. Possible *Actions* include:
  - **View**: View a report in read-only mode
  - **Edit**: Access the “Report” screen in edit mode
  - **Report Status**: Navigate to the “Report Form Status” page
OLDC Home: Tabs

- **Report Due**: Access reports that are currently available for submission. Once a report is submitted, it is removed from this tab but can still be accessed from *My Recent Activity, Activity Report*, and from the *Report Form Entry* menu
  - **View**: View a report in read-only mode
  - **Create**: Start a new report by navigating to the “Report” screen in edit mode
  - **Edit**: Access an existing report in edit mode
  - **Report Status**: Navigate to the “Report Form Status” page
OLDC Home: Navigation

- Navigation Links (breadcrumbs)
  - The links appear and disappear towards the top of the page as different screens are accessed
  - Click any of the links in the navigation path to return to previous screens in OLDC
  - The browser “back” button is disabled for security purposes
  - Use the Report Form Status link to navigate to the Report Form Status page (contains the report status, actions such as print or delete form, history, contacts, and a list of any attachments)
VERIFY EXISTING PERMISSIONS
Verify Existing Permissions

To verify one’s own permissions in OLDC:
• From the main menu, select **User/System Settings**
Verify Existing Permissions

- The “User Settings” screen appears. Click the link **View Assignments**
Verify Existing Permissions

- The “Program & Grantee Selection” screen appears. Select **Community Services Block Grant** from the *Program* drop-down list
- Select the **grantee** name (i.e. state, tribe, territory, or organization) from the *Grantee* drop-down list
- The screen refreshes and all assigned reports and roles are listed in the *View Assignments* section
Verify Existing Permissions

- To print the list of assignments, click the link **Printer Friendly** and then select the print option from the browser’s menu bar.
ACCESSING REPORTS
Accessing Reports

• Access the CSBG State Model Plan from the enhanced Home page
  – Click the **Report Due** tab
Accessing Reports

- Select a **Program** from the *Program* drop-down list. If the user is only assigned to one program, it appears by default.
- Select a **Grantee** from the *Grantee* drop-down list. If the user is only assigned to one grantee organization, it appears by default.
- Click the **Enter** button.
Accessing Reports

- Available reports appear in the Results Table
- Locate the *Model State Plan (CSBG)* with the due date of 9/30/2015
- From the Actions drop-down list, select *Create*
Accessing Reports

• The “Report Sections” screen appears. The Model State Plan contains 16 sections (including the Cover Page)
• Each section’s data is entered separately and sections may be saved individually
Accessing Reports

- **Report Sections Actions**
  - **Clear Section Data**: To begin entering the form, click the drop-down arrow next to a section, select **Edit Section**, and click **Go**
  - **Edit Section**: To begin entering the form, click the drop-down arrow next to a section, select **Edit Section**, and click **Go**
  - **Print**: To print a section, click the drop-down arrow next to a section, select **Print Section**, and click **Go**
Accessing Reports

• Once data is entered and saved for each section, the entire form must be validated from the “Report Sections” screen

• Validate checks the form for errors. If there are no errors such as missing data, the form is validated and ready to be certified
  – **Validated -- with Warnings**: The report form is saved and validated and there are some errors on the saved form. However, these errors 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
Accessing Reports

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.

<table>
<thead>
<tr>
<th>Section Name</th>
<th>Perform Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSBG Cover page</td>
<td></td>
</tr>
<tr>
<td>Section 1: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact,</td>
<td></td>
</tr>
<tr>
<td>and Official State Designation Letter</td>
<td></td>
</tr>
<tr>
<td>Section 2: State Legislation and Regulation</td>
<td></td>
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<tr>
<td>Section 3: State Plan Development and Statewide Goals</td>
<td></td>
</tr>
<tr>
<td>Section 4: CSBG Hearing Requirements</td>
<td></td>
</tr>
<tr>
<td>Section 5: CSBG Eligible Entities</td>
<td></td>
</tr>
</tbody>
</table>
Resources: OLDC Documentation Site

• Help resources are available by clicking the **News & Tips** link from the Main Menu
The “OLDC Documentation” site appears in a new window.
Resources: Support

- The Support Center provides assistance for OLDC customers
- Support team personnel are available Monday through Friday 8 a.m. to 6 p.m. ET
- app_support@acf.hhs.gov
- 866-577-0771
NEXT STEPS
Next Steps

• Submit OLDC registration forms no later than July 8, 2015 to Nikita.Frazier@acf.hhs.gov or LaToya.Smith@acf.hhs.gov

• Systems trainings on OLDC – Webinar Series
  - Registering/Accessing OLDC
  - State Plan Data Entry in OLDC
  (Online Posting and Access) including QuickSheets on various OLDC topics
QUESTION & ANSWERS