



Linking Services, Solutions, Communities

Online Data Collection Grantee Guide

Complete and Submit the Objective Progress
Report (OPR)

Courseware

Date: 03/01/016

The Grants Center
of Excellence

www.GrantSolutions.gov

Disclaimer: These user guides are intended for general purpose training. The GrantSolutions Center of Excellence is comprised of numerous Federal Partners who possess differing grant management policies and procedures. **As such these training guides may or may not incorporate Partner Specific policy related to application reviews and/or workflow procedures.** The intent of these user guides is: 1) to provide a training foundation on the GrantSolutions Software and 2) to engage users in understanding the system's flexibility for specific partner requirements.



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Introduction

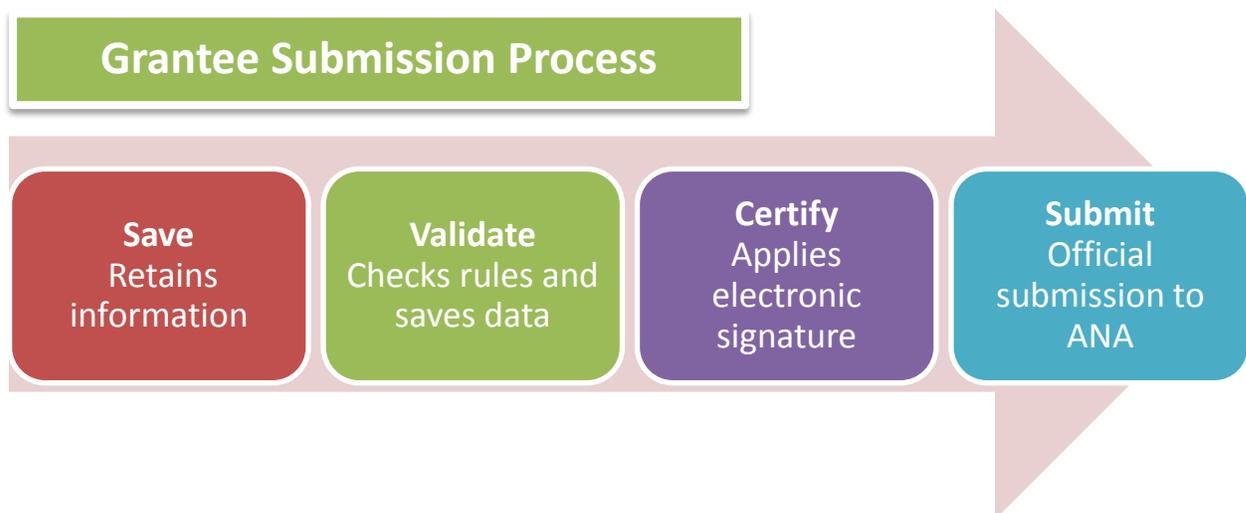
The GrantSolutions Grants Management Module (GMM) and Online Data Collection (OLDC) provide a convenient way for grantees to submit their Objective Progress Report (OPR). Grantees use the Internet to enter, certify, submit, and retrieve information pertinent to their OPR.

Note: In order to initiate the OPR, the Objective Work Plan (OWP) must first be available in the system. Please email or call your ANA point of contact with any questions.

Workflow

Grantees need to perform specific steps in order to submit the OPR. Those steps are listed below:

1. Login to the GMM, access Online Data Collection, and navigate to the OPR.
2. Enter and edit data, and save sections.
3. Validate the OPR to check against rules.
4. Certify the report to electronically sign.
5. Electronically submit the OPR.



Once the OPR is electronically submitted, the grantee's process is complete. The grantor then reviews the report and either accepts or returns for changes.

Login

Grantees may access the OPR from the GrantSolutions GMM or through Secure Sign-In.

For instructions on how to access the OPR directly through Secure Sign-in, please skip to the section [Login through the Secure Sign-In](#) on page 5.

Login through the GrantSolutions GMM

Grantees access the OPR directly from the GrantSolutions GMM.

Note: The first time OLDC is launched from the GMM, some grantees may need to link their accounts. This is a one-time action.

To log in, and if necessary, link the GMM and OLDC accounts:

1. From an Internet browser (such as Internet Explorer Mozilla Firefox, or Google Chrome), go to www.grantsolutions.gov.
2. The “Grants Center of Excellence” Home page appears. Click the button **Login to GrantSolutions**.



Figure 1: The Grants Center of Excellence Home page

3. The GMM “Login” screen appears. Enter the username in the **Username** field and the password in the **Password** field. Click the **Login** button.



Figure 2: GrantSolutions Login screen

- The “My Grants List” screen appears. From the menu bar, select **Online Data Collection**.

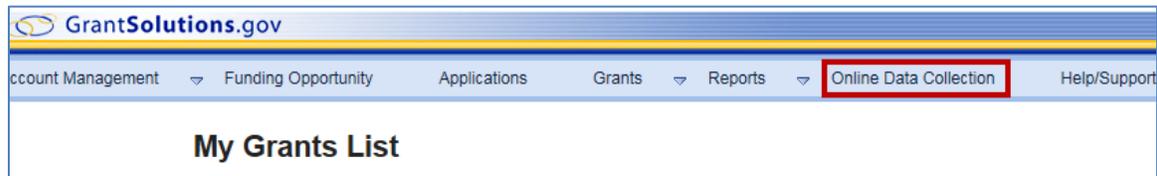


Figure 3: My Grants List - Online Data Collection menu option

- ***This step may appear for some grantees the first time they access OLDC*****
The “Sign-In to My Account” screen appears in a new window. Enter the OLDC **username** and **password** that was received via email, and then click the **Login** button.

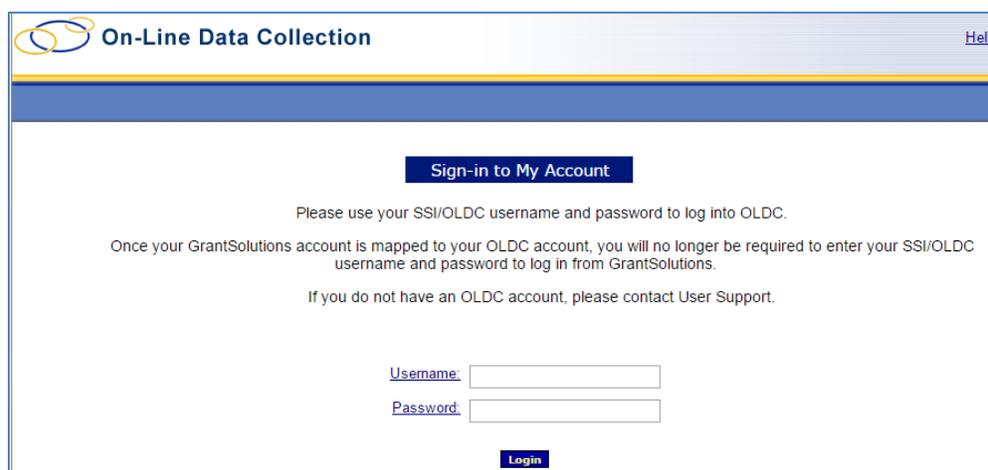


Figure 4: OLDC Sign-in to My Account screen

Note: Once the accounts are linked, the Sign-in to My Account screen does not appear again.

- The OLDC “Home” screen appears.

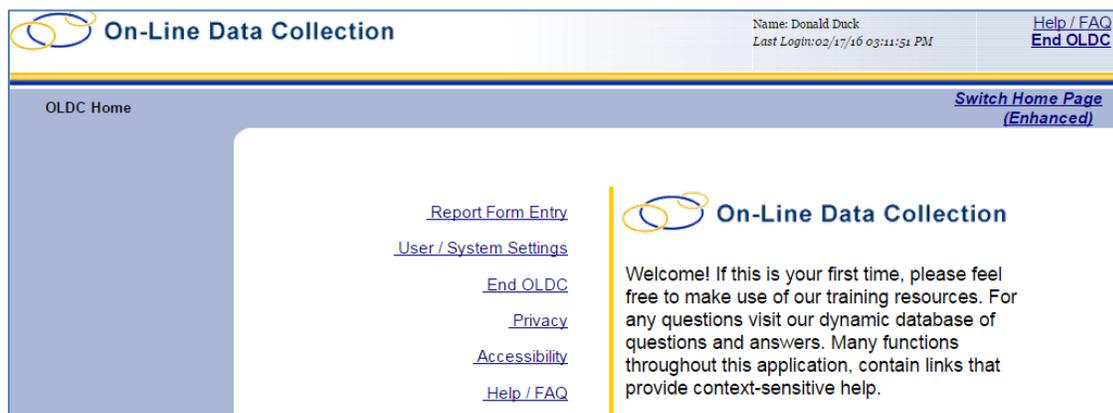


Figure 5: OLDC Home page

Login through Secure Sign-In

To access the OPR through Secure Sign- In (the secure web portal for accessing Online Data Collection), follow the below steps:

1. Enter the following web address in your browser Address line:
<https://extranet.acf.hhs.gov/ssi/>.
2. The Secure Sign-In (SSI) login screen displays. Enter your OLDC **user name** and **password**, and then click **Login**.

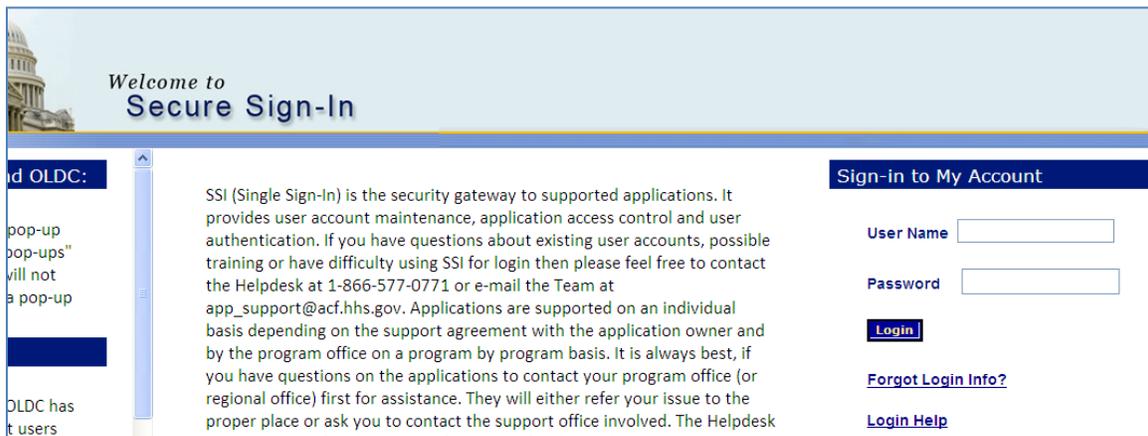


Figure 6: Secure Sign-In Login screen

Note: Passwords are case-sensitive.

3. The “Password Policy” pop-up message appears. The first time a user logs into the system, they are required to change their password for security purposes. Click **OK**.

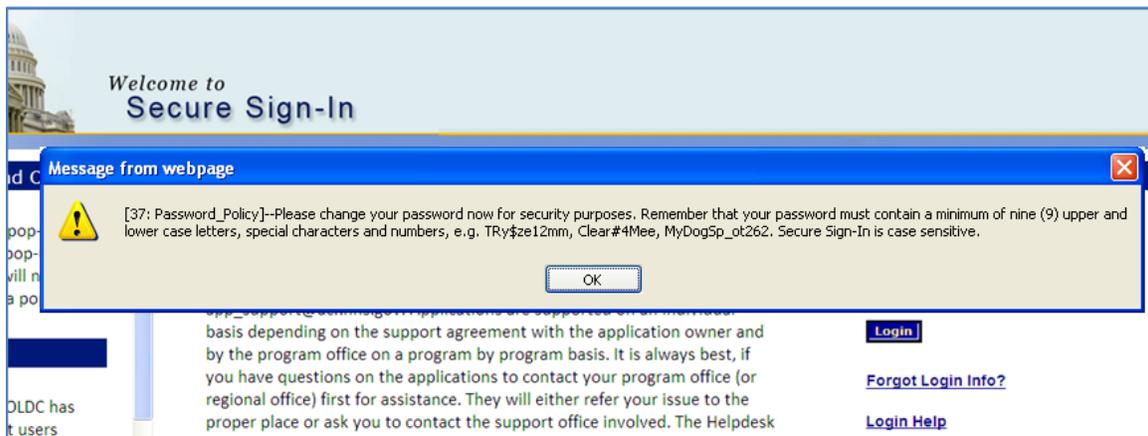


Figure 7: Password Policy messages

- The “Change Password” screen appears. Enter the **current password**, a **new password**, and **confirm new password**.
- Click the **Change Password** button.



Change Password

Click on "Change Password" to save the new password.

Current Password*:

New Password*:

Confirm New Password*:

Change Password

Figure 8: Change password screen

- The “Change Challenge Question” screen displays. Set up a Challenge Question to reset a password from the Forgot Password? link on the login screen. Select a **Challenge Question** from the drop-down list, and then enter an **Answer**.
- Click the **Save Q and A** button.



Change Challenge Question

The Challenge question and answer are used to validate your request for a new password.

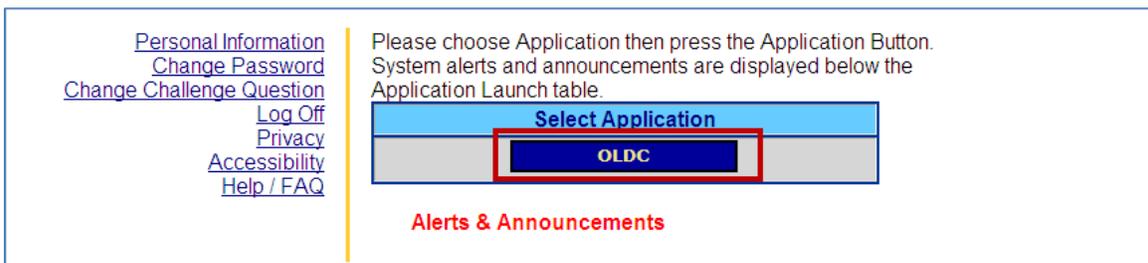
Challenge Question*:

Answer*:

Save Q and A

Figure 9: Change Challenge Question screen

- The Secure Sign-In (SSI) “Home” screen displays. Under *Select Application*, click the **OLDC** button.



[Personal Information](#)
[Change Password](#)
[Change Challenge Question](#)
[Log Off](#)
[Privacy](#)
[Accessibility](#)
[Help / FAQ](#)

Please choose Application then press the Application Button. System alerts and announcements are displayed below the Application Launch table.

Select Application

OLDC

Alerts & Announcements

Figure 10: Secure Sign-In Home screen - OLDC button

9. The OLDC “Home” screen opens in a new window.

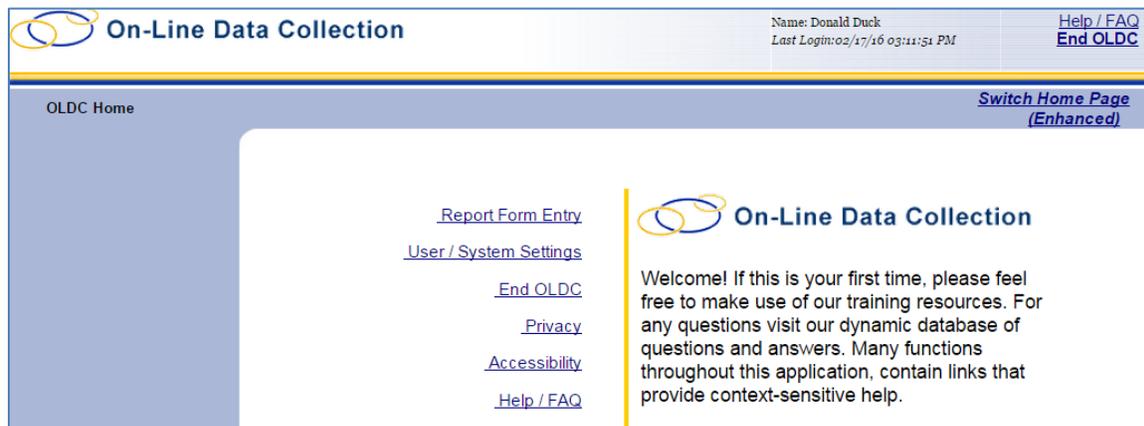


Figure 11: OLDC Home screen

Navigation

The main menu is available from the OLDC “Home” screen. From the main menu, users may access forms, view *News and Tips*, and *End OLDC*.

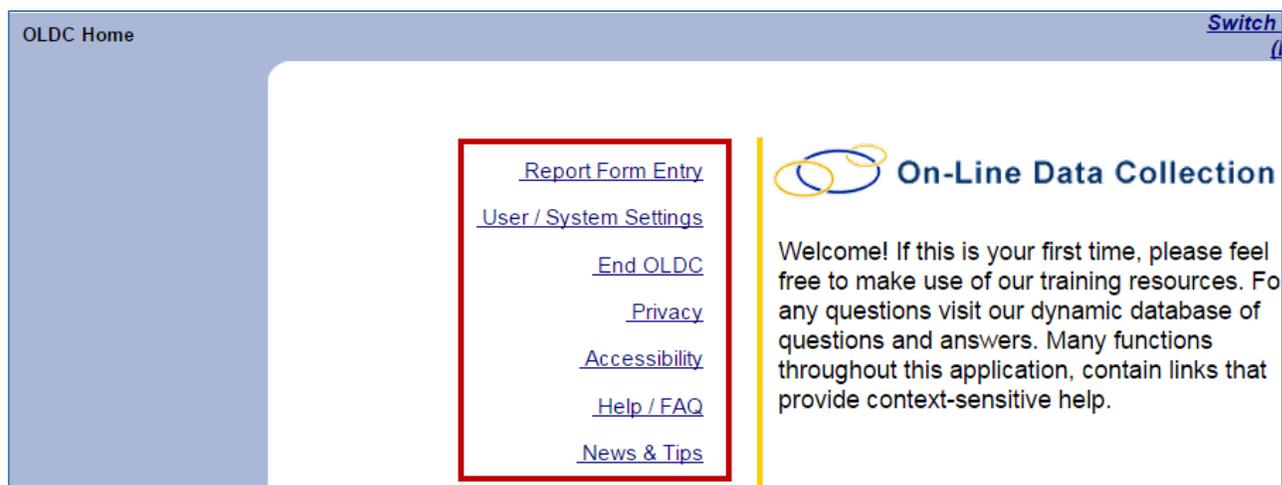


Figure 12: OLDC Home screen

Click any of the Navigation links (breadcrumbs) towards the top of the page to return to previously visited screens. Navigation links appear and disappear as different screens are accessed. For security purposes, do not use the back button.



Figure 13: Navigation links

Enhanced Home Page

An enhanced tabular “Home” page option is available to grantees. This screen was created to improve navigation and ease of use while retaining access to the main menu. When grantees access the enhanced Home page, three tabs are available: My Recent Activity, Activity Report, and Report Due.

To activate the enhanced “Home” page view:

1. From the right side of the “OLDC Home” screen, click the link **Switch Home Page (Enhanced)**.

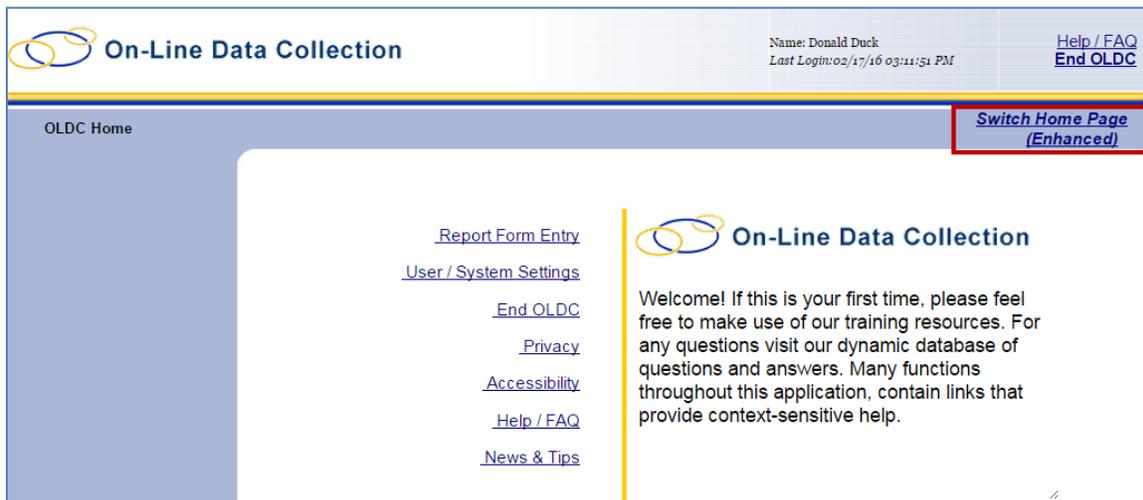


Figure 14: OLDC Home - Switch Home Page (Enhanced) link

2. 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.

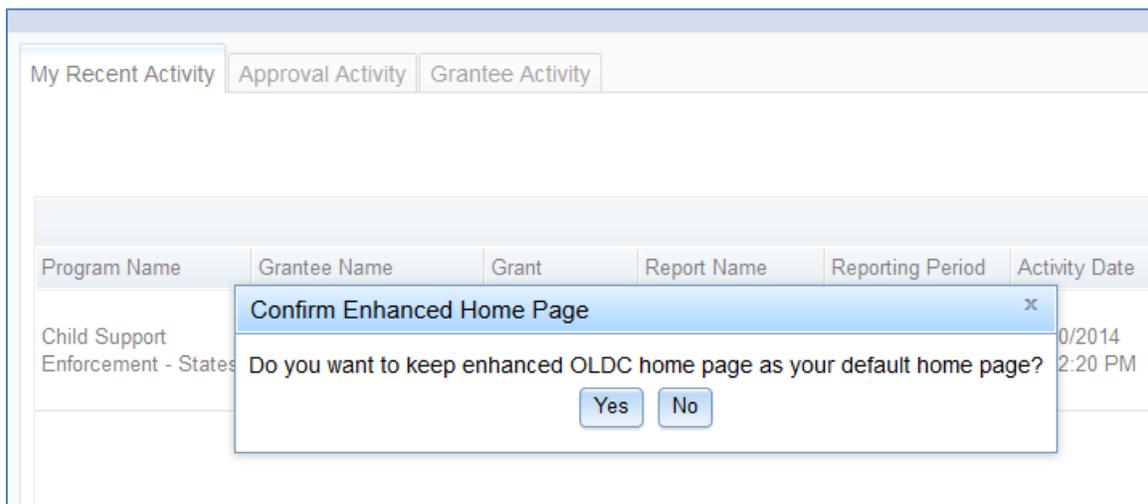


Figure 15: Confirmation Pop-up Message

3. The new “Home” screen appears. To return to the regular Home screen view, click the link **Switch Home Page (Regular)**.

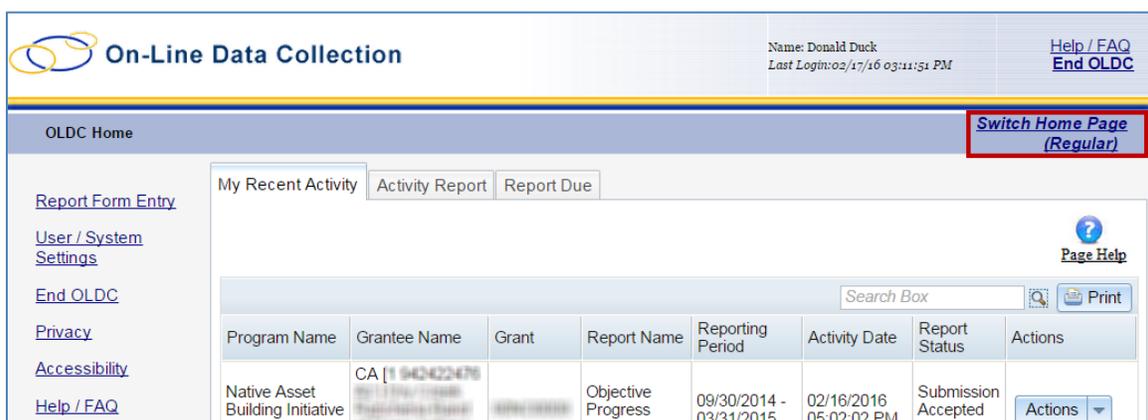
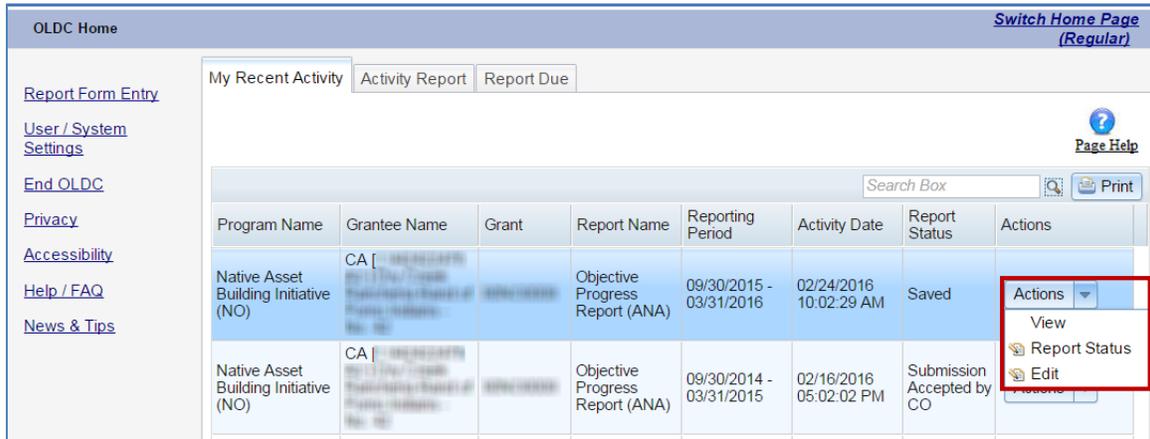


Figure 16: Enhanced OLDC Home screen - Switch Home Page (Regular) link

The “My Recent Activity” tab contains all reports recently accessed by the user. To perform an action for a report, click the **Actions** drop-down list and select one of the following options:

- **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.

Please note that available actions depend on the user’s permissions and the status of the report.



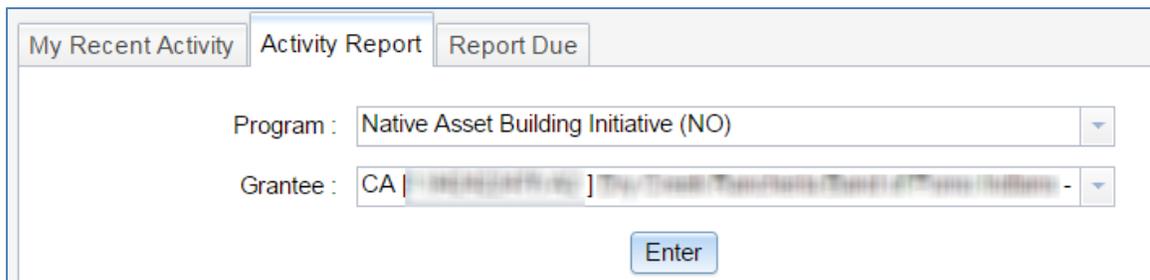
Program Name	Grantee Name	Grant	Report Name	Reporting Period	Activity Date	Report Status	Actions
Native Asset Building Initiative (NO)	CA [...]	[...]	Objective Progress Report (ANA)	09/30/2015 - 03/31/2016	02/24/2016 10:02:29 AM	Saved	Actions View Report Status Edit
Native Asset Building Initiative (NO)	CA [...]	[...]	Objective Progress Report (ANA)	09/30/2014 - 03/31/2015	02/16/2016 05:02:02 PM	Submission Accepted by CO	Actions View Report Status Edit

Figure 17: My Recent Activity Tab

Use the "Activity Report" tab to 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.

To search for reports:

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



My Recent Activity | Activity Report | Report Due

Program : Native Asset Building Initiative (NO)

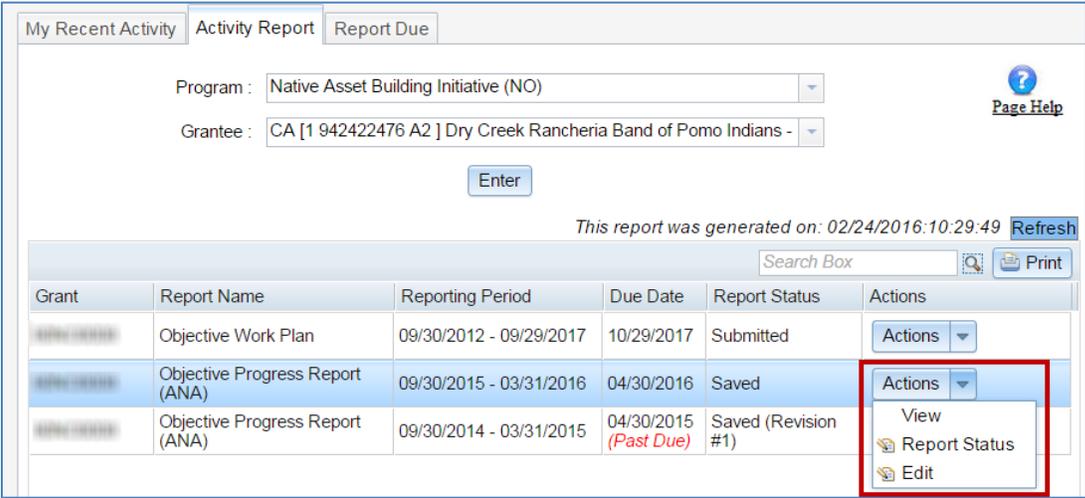
Grantee : CA [...]

Enter

Figure 18: Activity Report Search

4. The *Results Table* appears. Click the **Actions** drop-down list and select one of the following options:

- **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.



The screenshot shows the 'Activity Report' tab in a web application. At the top, there are tabs for 'My Recent Activity', 'Activity Report', and 'Report Due'. Below the tabs, there are dropdown menus for 'Program' (Native Asset Building Initiative (NO)) and 'Grantee' (CA [1 942422476 A2] Dry Creek Rancheria Band of Pomo Indians -), with an 'Enter' button below them. A 'Page Help' icon is visible in the top right. A timestamp indicates the report was generated on 02/24/2016:10:29:49, with a 'Refresh' button. Below this is a 'Search Box' and a 'Print' button. The main content is a table with columns: Grant, Report Name, Reporting Period, Due Date, Report Status, and Actions. The table contains three rows of reports. The 'Actions' dropdown for the second row is expanded, showing options: View, Report Status, and Edit. The 'Report Status' option is highlighted with a red box.

Grant	Report Name	Reporting Period	Due Date	Report Status	Actions
	Objective Work Plan	09/30/2012 - 09/29/2017	10/29/2017	Submitted	Actions
	Objective Progress Report (ANA)	09/30/2015 - 03/31/2016	04/30/2016	Saved	Actions
	Objective Progress Report (ANA)	09/30/2014 - 03/31/2015	04/30/2015 <i>(Past Due)</i>	Saved (Revision #1)	View Report Status Edit

Figure 19: Activity Report Tab

Use the "Report Due" tab to 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.

Reports are available from this tab going back two years from the current date. To access reports that were due over two years ago, use the **Report Form Entry** link from the main menu.

To search for reports:

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

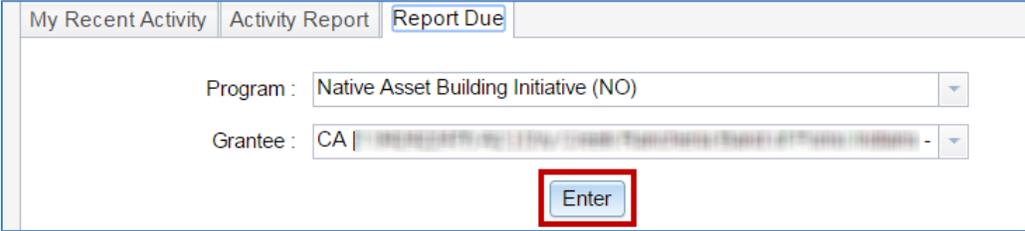
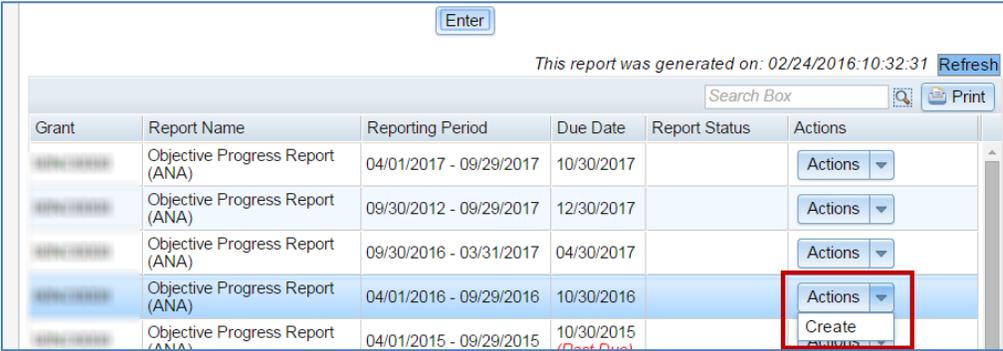


Figure 20: Report Due Search criteria

4. The *Results Table* appears. Click the **Actions** drop-down list and select one of the following options:
 - **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.



Grant	Report Name	Reporting Period	Due Date	Report Status	Actions
00000000	Objective Progress Report (ANA)	04/01/2017 - 09/29/2017	10/30/2017		Actions
00000000	Objective Progress Report (ANA)	09/30/2012 - 09/29/2017	12/30/2017		Actions
00000000	Objective Progress Report (ANA)	09/30/2016 - 03/31/2017	04/30/2017		Actions
00000000	Objective Progress Report (ANA)	04/01/2016 - 09/29/2016	10/30/2016		Actions
00000000	Objective Progress Report (ANA)	04/01/2015 - 09/29/2015	10/30/2015 (Past Due)		Actions

Figure 21: Report Due Results Table

Access the OPR from the Report Form Entry Menu

To access the OPR from the Report Form Entry menu:

1. From the OLDC “Home” screen, select **Report Form Entry**.

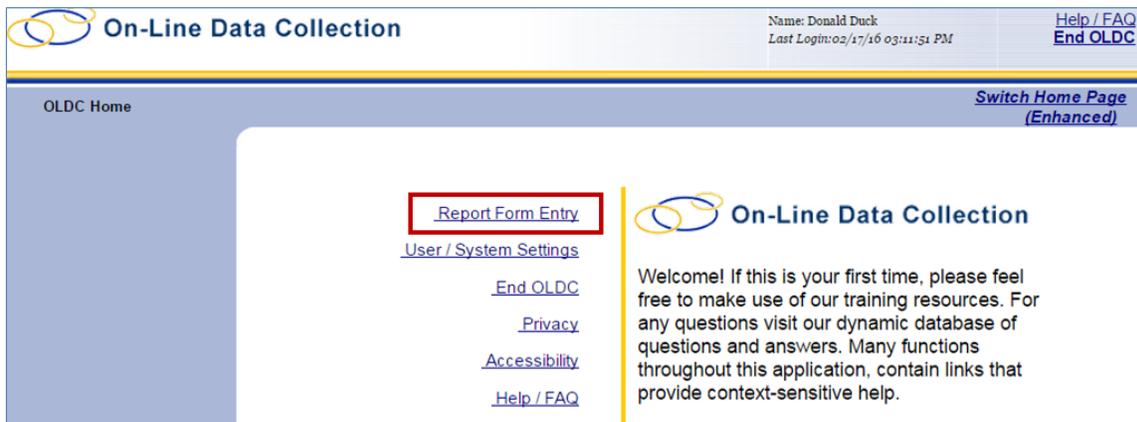


Figure 22: OLDC Home - Report Form Entry

Note: Report Form Entry may be accessed from either the Regular or Enhanced Home page.

2. The “Form Selection” screen appears. From the Step 1: Program Name drop-down list, select the desired **program**.

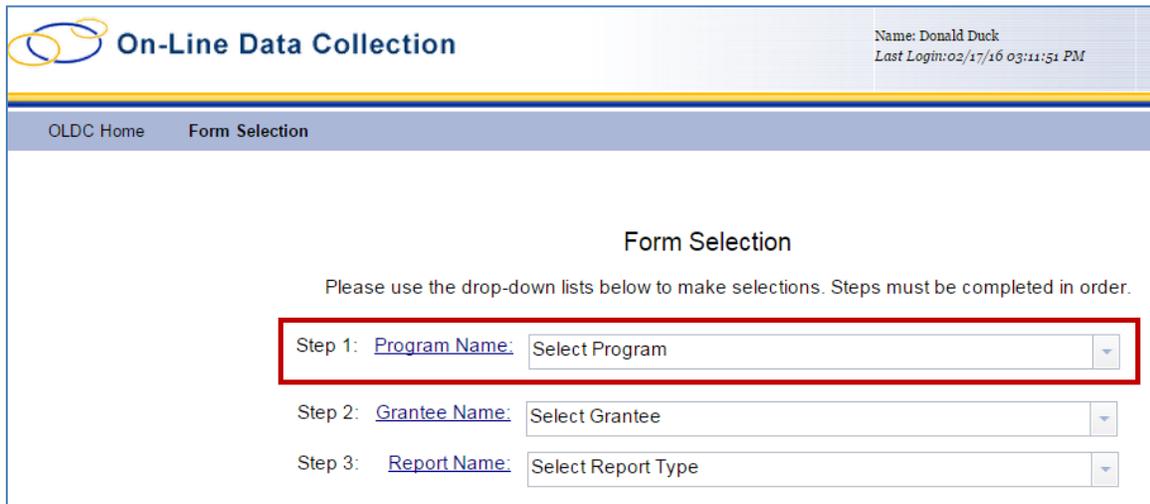
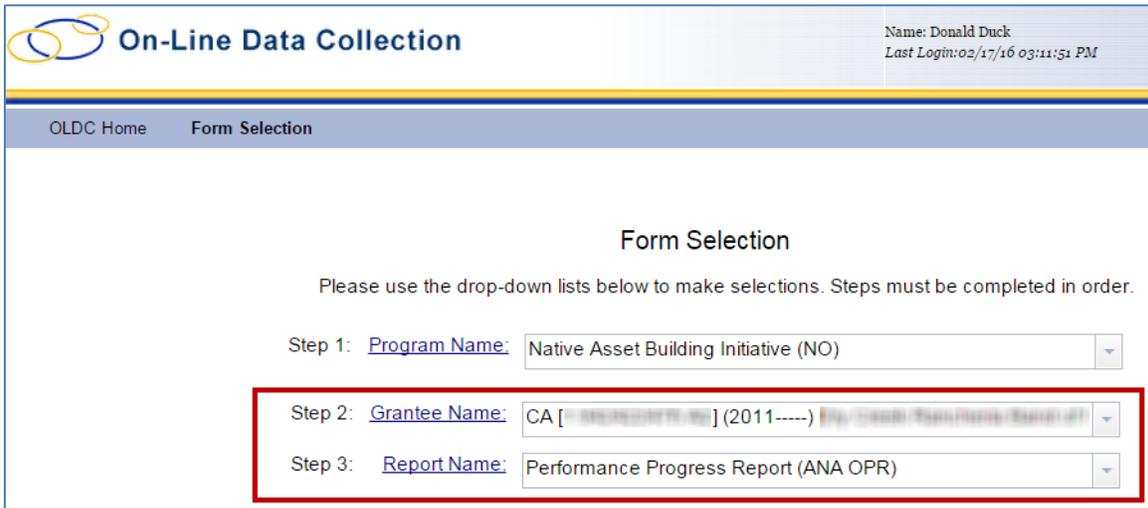


Figure 23: Form Selection screen - Program Name

- The assigned **organization name** populates in the *Grantee Name* drop-down list.

In Step 3, select **Performance Progress Report (ANA OPR)** from the *Report Name* drop-down list.



On-Line Data Collection Name: Donald Duck
Last Login: 02/17/16 03:11:51 PM

OLDC Home Form Selection

Form Selection

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

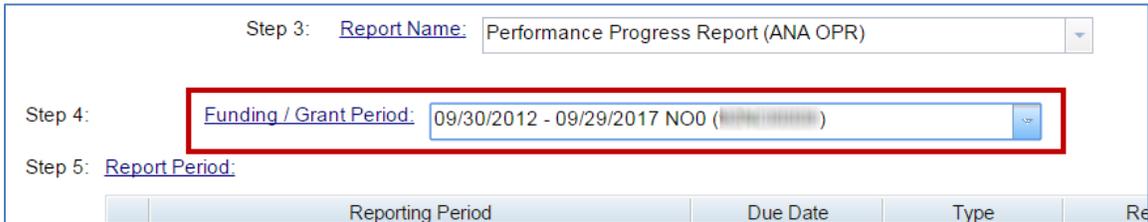
Step 1: Program Name: Native Asset Building Initiative (NO)

Step 2: Grantee Name: CA [...] (2011-----)

Step 3: Report Name: Performance Progress Report (ANA OPR)

Figure 24: Form Selection screen - Steps 2 and 3

- The screen refreshes and Steps 4 – 6 appear. From the Step 4 drop-down list, select the **Funding / Grant Period**.



Step 3: Report Name: Performance Progress Report (ANA OPR)

Step 4: Funding / Grant Period: 09/30/2012 - 09/29/2017 NO0 (...)

Step 5: Report Period:

Reporting Period	Due Date	Type	Re
------------------	----------	------	----

Figure 25: Selection screen - Step 4 Funding / Grant Period

5. In Step 5, select the radio button to the left of the desired **Report Period**.

Step 3: **Report Name:** Performance Progress Report (ANA OPR)

Step 4: **Funding / Grant Period:** 09/30/2012 - 09/29/2017 NO0 (90NO0008)

Step 5: **Report Period:**

	Reporting Period	Due Date	Type	Report Status
<input type="radio"/>	09/30/2012 - 09/29/2017	12/30/2017	Grant (Final)	
<input type="radio"/>	04/01/2017 - 09/29/2017	10/30/2017	Semi-Annual	
<input type="radio"/>	09/30/2016 - 03/31/2017	04/30/2017	Semi-Annual	
<input type="radio"/>	04/01/2016 - 09/29/2016	10/30/2016	Semi-Annual	
<input checked="" type="radio"/>	09/30/2015 - 03/31/2016	04/30/2016	Semi-Annual	
<input type="radio"/>	04/01/2015 - 09/29/2015	10/30/2015	Semi-Annual	

Figure 26: Form Selection screen - Step 5 Report Period

6. From the Step 6 drop-down list, select the Action **New/Edit/Revise Report**. Click the **Enter** button.

<input type="radio"/>	04/01/2014 - 09/29/2014	10/30/2014	Semi-Annual	
<input type="radio"/>	09/30/2013 - 03/31/2014	04/30/2014	Semi-Annual	
<input type="radio"/>	04/01/2013 - 09/29/2013	10/30/2013	Semi-Annual	

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

Enter

Figure 27: Form Selection screen - Step 6 Select Action

Tip: Other selections from the Select Actions drop-down list are:

- **New/Edit/Revise:** Initialize a new report, edit an existing report, or create a revision for a completed report that is already approved by ANA.
- **View/Print/Status/Approve Report:** Navigate to the Report Form Status page where the report can be viewed, printed, and the report history is visible.
- **Print Latest Version (HTML):** Open a printable version of the report in the browser window. Use the browser print option.
- **View Latest Report:** View the latest version of the report in read-only mode.

Select Action

New / Edit / Revise Report

View / Print / Status / Approve Report

Print Latest Version (HTML)

View Latest Report

Figure 28: Available Actions

7. The “Report Sections” screen appears.



On-Line Data Collection

Name: Donald Duck
 Last Login: 02/24/16 10:06:26 AM

[Help / FAQ](#)
[End OLDC](#)

LDC Home
Form Selection
Report Sections
Report Form Status

Report Sections

[Program Name:](#) Native Asset Building Initiative (NO)
[Grantee Name:](#) [REDACTED]
[Report Name:](#) Objective Progress Report (ANA)
[Funding/Grant Period:](#) 09/30/2012 - 09/29/2017 NOO ([REDACTED])
[Report Period:](#) 09/30/2015 - 03/31/2016

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

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
Print Full Report

Section Name:	Perform Action:	Section Status
ANA OPR - Cover Page	Select Action: <input type="button" value="Go"/>	Initialized
A. Objective Work Plan (OWP) Status/Update	Select Action: <input type="button" value="Go"/>	Initialized
* A. Project Year 1	Select Action: <input type="button" value="Go"/>	Initialized
* A. Project Year 2	Select Action: <input type="button" value="Go"/>	Initialized
* A. Project Year 3	Select Action: <input type="button" value="Go"/>	Initialized
B. Staffing and Human Resources	Select Action: <input type="button" value="Go"/>	Initialized
C. Challenges	Select Action: <input type="button" value="Go"/>	Initialized
D. Financial	Select Action: <input type="button" value="Go"/>	Initialized
E. Other	Select Action: <input type="button" value="Go"/>	Initialized
F. Native Assets Building Initiative (NABI) Grants	Select Action: <input type="button" value="Go"/>	Initialized

Figure 29: Report Sections screen

Complete the OPR

Report Sections Screen

Several sections are listed on the “Report Sections” screen. Each section is edited and validated separately. Each section row also contains its own status in the *Status* column. Report and section statuses may be different until after the entire report is Saved—Validated.

Note: Only NABI grantees complete section F.

The “Report Sections” screen contains action buttons. The available buttons depend on a user’s permissions and the status of the OPR. Users with data entry capabilities have the ability to View/Add Attachments, Validate the report to ensure all report requirements are met, and Print Full Report as a PDF (not including attachments).

The *Perform Action* drop-down list is available for each row. The actions include the following:

- **Clear Section Data:** Delete all data previously saved in a section
- **Edit Section:** Enter data for a section
- **Print Section:** Open a nicely formatted printable version of the section. Use the browser menu bar or shortcut menu to print the page

Note: To print all sections as one complete report in PDF format, use the **Print Full Report** action button located on the Report Sections screen.

Report Sections

Program Name: Native Asset Building Initiative (NO)
Grantee Name: The Grants Center of Excellence
Report Name: Objective Progress Report (ANA)
Funding/Grant Period: 09/30/2012 - 09/29/2017 NOO (09/30/2012)
Report Period: 09/30/2015 - 03/31/2016

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

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
Print Full Report

Section Name:	Perform Action:	Section Status
ANA OPR - Cover Page	Select Action: Go	Initialized
A. Objective Work Plan (OWP) Status/Update	Select Action: Go	Initialized
* A. Project Year	Clear Section Data Edit Section Print Section Go	Initialized
1		

Figure 30: Report Sections screen – Action buttons and Perform Action drop-down list

Note: The number of Section A. Project Year rows is dependent on the number of years entered on the OWP. For changes to the OWP, please contact ANA staff.

Enter Data, Save, and Validate

To begin entering OPR data:

1. Click the drop-down arrow next to a section (i.e. ANA OPR-Cover Page). From the *Perform Action* column, select **Edit Section** and then click the **Go** button.

View/Add Attachments Validate Print Full Report		
Section Name:	Perform Action:	Sec
ANA OPR - Cover Page	Select Action: Go	Initialized
A. Objective Work Plan (OWP) Status/Update	Select Action: Go	Initialized
* A. Project Year 1	Edit Section Go	Initialized
* A. Project Year	Select Action: Go	Initialized

Figure 31: Perform Action drop-down list - Edit Section and Go button

2. The New (Initialized) "Report" displays.

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

Program Name: Native Asset Building Initiative (NO)
Grantee Name: U.S. Credit Transitions Board of Public Initiatives (NO)
Report Name: Objective Progress Report (ANA)
Funding/Grant Period: 09/30/2012 - 09/29/2017 NO0 (#N000008)
Report Period: 09/30/2015 - 03/31/2016
Report Status: Saved
Section Status: Initialized

Report Progress

Initialized
 Edit-Saved
 Validated
 Certified
 Submitted
 In Review
 C/O Approved

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES OMB Clearance No.: 0970-0452
Expiration Date: 06/30/2018
 ADMINISTRATION FOR CHILDREN AND FAMILIES

**Administration for Native Americans
On-going Project Progress Report
(ANA-OPR)**

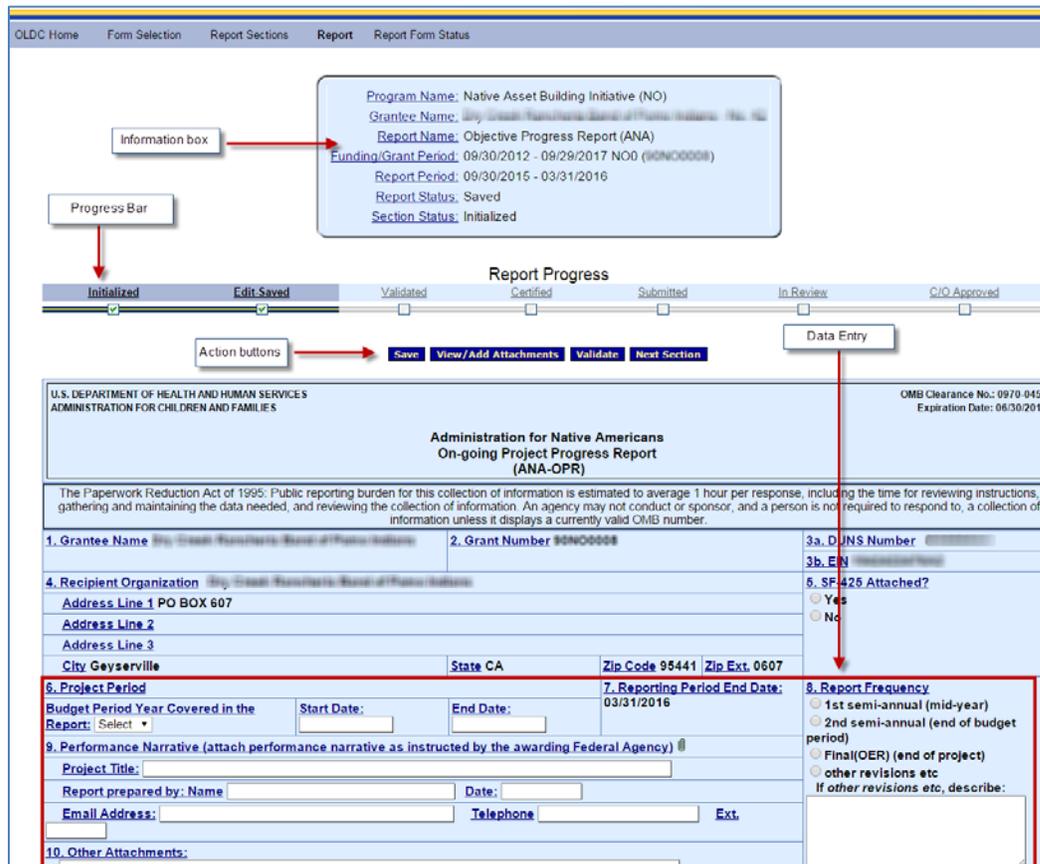
The Paperwork Reduction Act of 1995: Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB number.

1. Grantee Name U.S. Credit Transitions Board of Public Initiatives	2. Grant Number #N000008	3a. DUNS Number [REDACTED]
4. Recipient Organization U.S. Credit Transitions Board of Public Initiatives		3b. EIN [REDACTED]
Address Line 1 PO BOX 607		5. SF-425 Attached? <input type="radio"/> Yes <input type="radio"/> No
Address Line 2		
Address Line 3		

Figure 32: Report screen - Cover Page

Report Screen

The “Report” screen is divided into four parts: the Information box, Progress bar, Action buttons, and data entry.

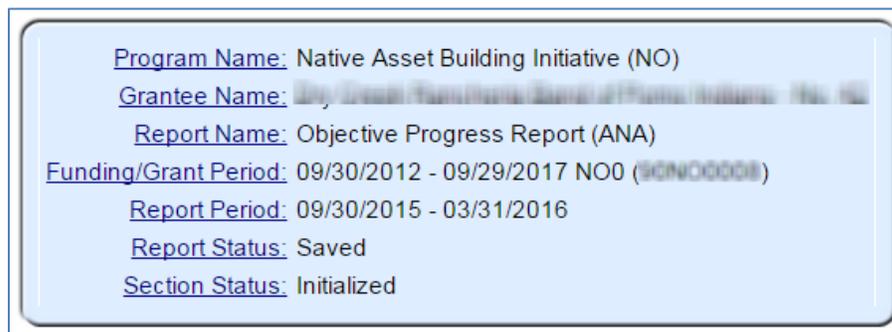


The screenshot shows the 'Report' screen with the following components:

- Information box:** Contains details such as Program Name (Native Asset Building Initiative (NO)), Grantee Name, Report Name (Objective Progress Report (ANA)), Funding/Grant Period (09/30/2012 - 09/29/2017 NO0), Report Period (09/30/2015 - 03/31/2016), Report Status (Saved), and Section Status (Initialized).
- Progress Bar:** A horizontal bar showing the status of various report sections: Initialized (checked), Edit Saved (checked), Validated, Certified, Submitted, In Review, and C/O Approved.
- Action buttons:** A row of buttons including Save, View/Add Attachments, Validate, and Next Section.
- Data Entry:** A large form area containing fields for Grantee Name, Grant Number, Recipient Organization, Project Period, Reporting Period End Date, Report Frequency, and Performance Narrative.

Figure 33: Report screen

The Information box includes all the selections used to create the Report. The status is Initialized.



The Information Box contains the following details:

- Program Name:** Native Asset Building Initiative (NO)
- Grantee Name:** U.S. Department of Health and Human Services, Administration for Native Americans, No. 42
- Report Name:** Objective Progress Report (ANA)
- Funding/Grant Period:** 09/30/2012 - 09/29/2017 NO0 (09NO0000)
- Report Period:** 09/30/2015 - 03/31/2016
- Report Status:** Saved
- Section Status:** Initialized

Figure 34: Information Box

The Progress bar is a useful tool for visually representing the current status of the Report. In addition, the Progress bar also displays the steps that are already finished as well as the steps that need to be taken in order to complete the process.

The grantee process includes the following statuses/actions:

- Initialized
- Edit-Saved
- Validated
- Certified
- Submitted

The Federal process includes the following statuses/actions:

- In Review
- C/O Approved

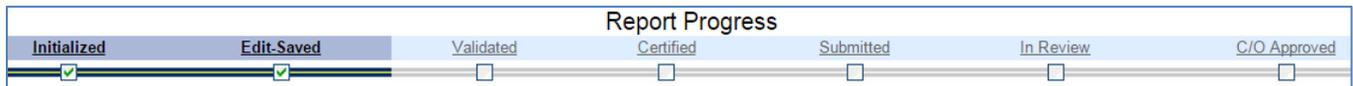


Figure 35: Report Progress Bar

Below the Information box and Report Progress bar are the Action buttons. Users with data entry capabilities are able to Save, View/Add Attachments, Validate, and navigate to the Previous/Next Section. Action buttons are also available towards the bottom of the screen.

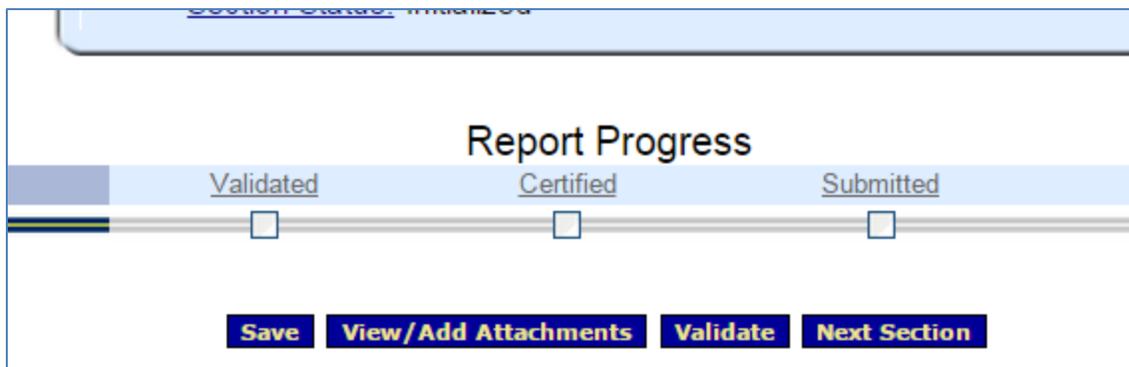
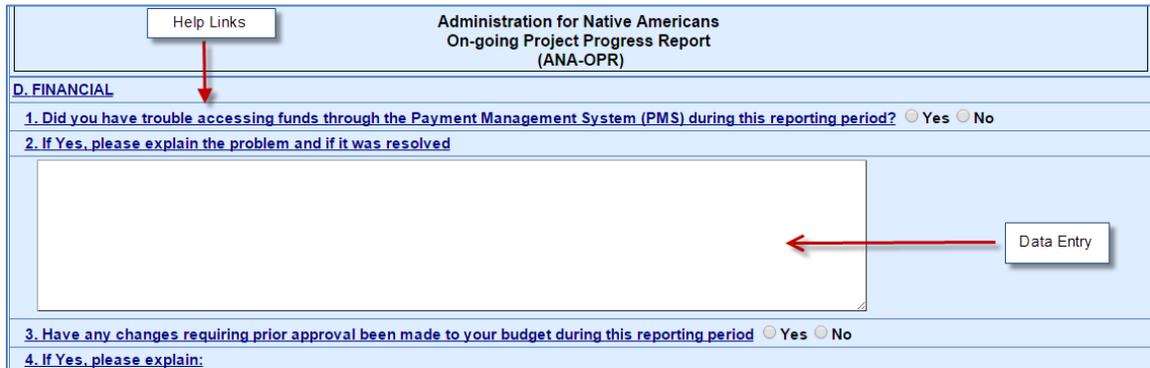


Figure 36: Action buttons

Below the Action buttons is the report.

- Click the blue underlined help links to view form instructions in a pop-up window.
- Some fields are populated from the OWP and are read-only.
- Enter data in open fields.



Administration for Native Americans
On-going Project Progress Report
(ANA-OPR)

D. FINANCIAL

1. Did you have trouble accessing funds through the Payment Management System (PMS) during this reporting period? Yes No

2. If Yes, please explain the problem and if it was resolved

3. Have any changes requiring prior approval been made to your budget during this reporting period Yes No

4. If Yes, please explain:

Figure 37: Report screen - help links and data entry

Double-click an open number field to use the Calculator.

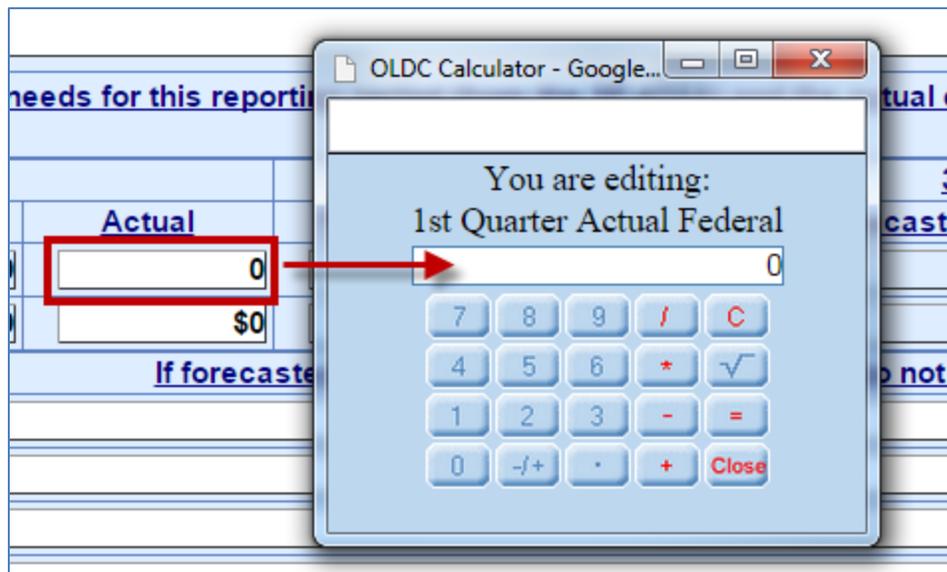


Figure 38: Calculator tool

Enter Data and Save

1. Complete each section to the best of your ability. Click the Save button frequently to avoid timing out (action buttons are located towards both the top and bottom of the screen).



Figure 39: Save button

Important! Save often. A timeout warning message appears after 25 minutes of inactivity. Activity includes clicking any of the actions buttons (e.g. Save, Validate, Certify, and Submit) or navigating to another screen. **Entering data and clicking help links are not considered actions.** When the timeout warning message appears, click the **OK** button to continue working and restart timeout the clock for another 25 minutes.

2. Once a section is completed and saved, click the **Next Section** button.



Figure 40: Next Section button

3. A message appears stating any unsaved changes made on this screen will be lost. Click **OK**.

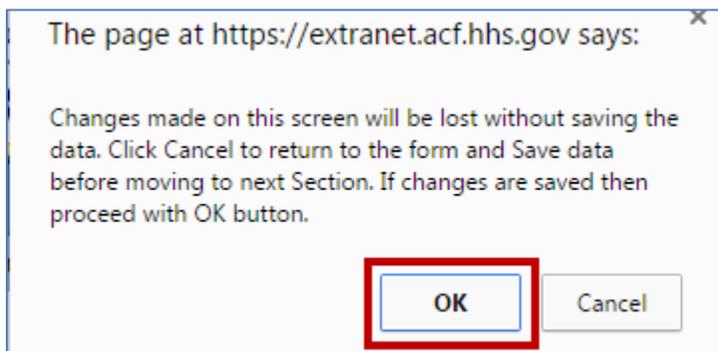


Figure 41: Pop-up message

4. The next section appears (in this example, it is “A. Objective Work Plan (OWP) Status/Update”). Answer the questions and enter data in the text boxes.

Note: Questions with a Yes or No answer may require a description.

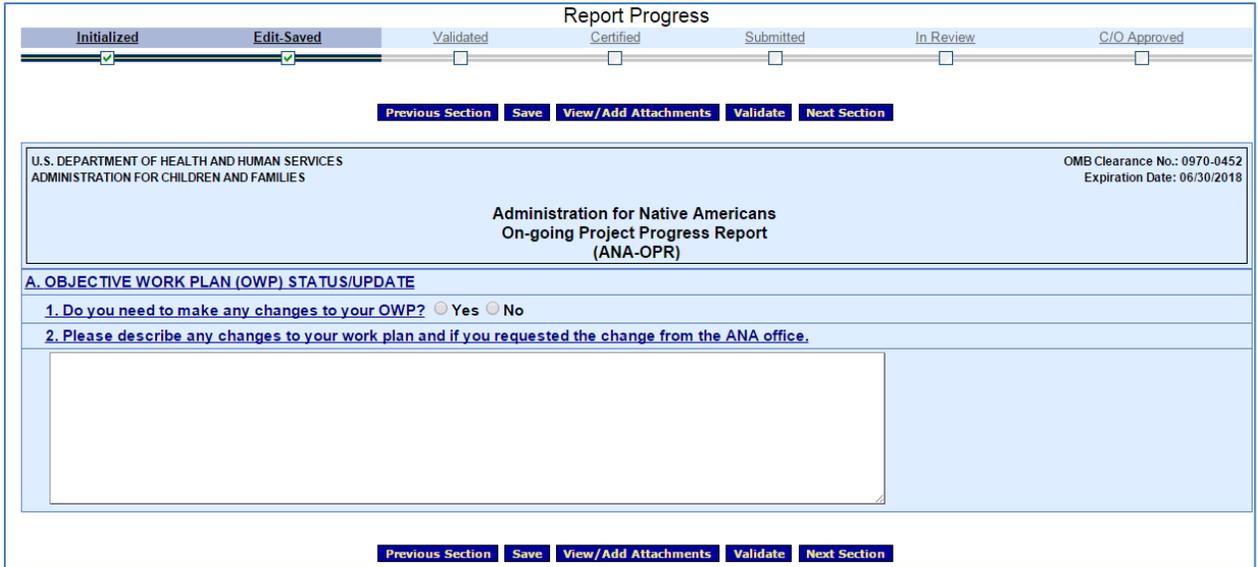


Figure 42: Report screen - Section A. Objective Work Plan Status/Update

5. In some sections, additional rows may be added by selecting a **number** from the **Add** drop-down list and then clicking the **Add** button.



Figure 43: Report screen - Add row button

- Once a row is added, it may be deleted by selecting the **Delete** checkbox to the right of the row, and then clicking the **Delete Marked Rows** button.

5. Please list, in the following table, all positions required for the project and currently filled:

	Position Title	Position Type	Position Funding	Name of Individual	Filled by Native?	Date Job Filled	Avg. # Hours Per Week	Date Job Ended (if applicable)	Did position exist before the project?	Will position continue after the project ends? (only for final reporting period)	Delete
1	<input type="text"/>	Select ▼	Select ▼	<input type="text"/>	Select ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼	Select ▼	<input type="checkbox"/>
2	<input type="text"/>	Select ▼	Select ▼	<input type="text"/>	Select ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼	Select ▼	<input checked="" type="checkbox"/>

Add Project position(s): 1 ▼ Add **Delete Marked Rows**

Figure 44: Report screen - Delete row

- A pop-up message appears stating “This will permanently delete the selected rows. Do you wish to proceed?” Click **OK**.

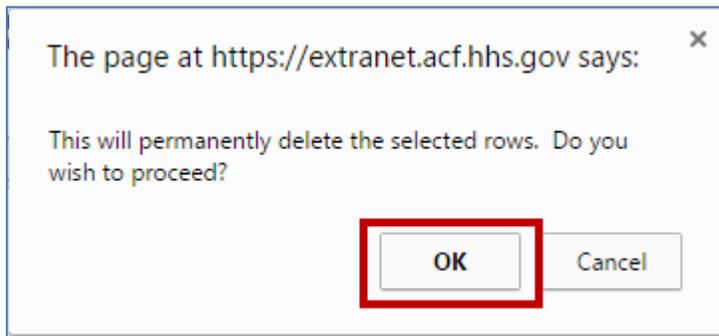


Figure 45: Pop-up message: This will permanently delete the selected rows. Do you wish to proceed?

Note: The original row may not be deleted.

8. Click the paper clip icon within a cell to attach one or more files to that location.

*Note: File may also be attached to the report by using the **View/Add Attachments** button located towards the top and bottom of each section as well as on the Report Sections screen.*

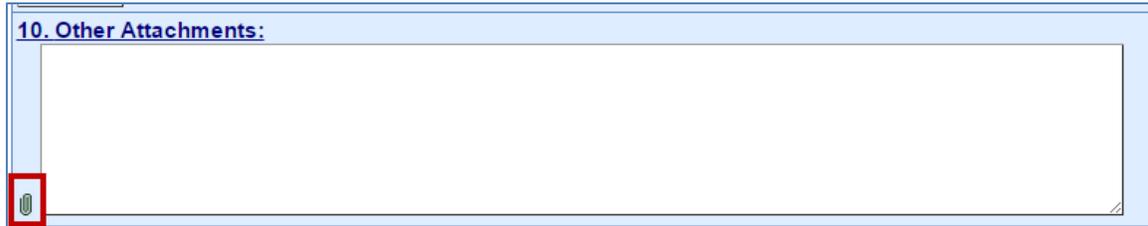


Figure 46: Paperclip - cell attachment icon

Tip: To avoid losing data, save the section before attaching documents.

9. A warning message appears stating any changes not saved will be lost. Click **OK**.

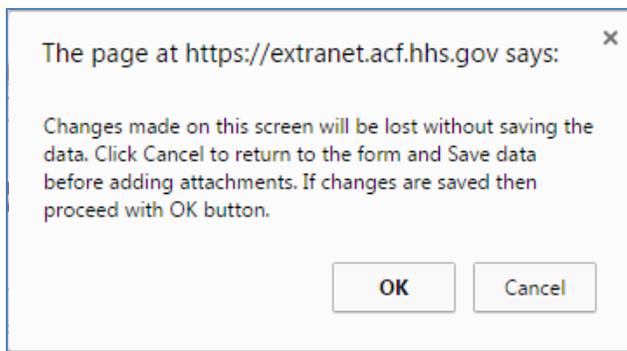


Figure 47: Warning message - any changes not saved will be lost

- The “File Attachment” screen appears. Click **Choose File** to locate the file to attach (the file must be on your local machine or network).

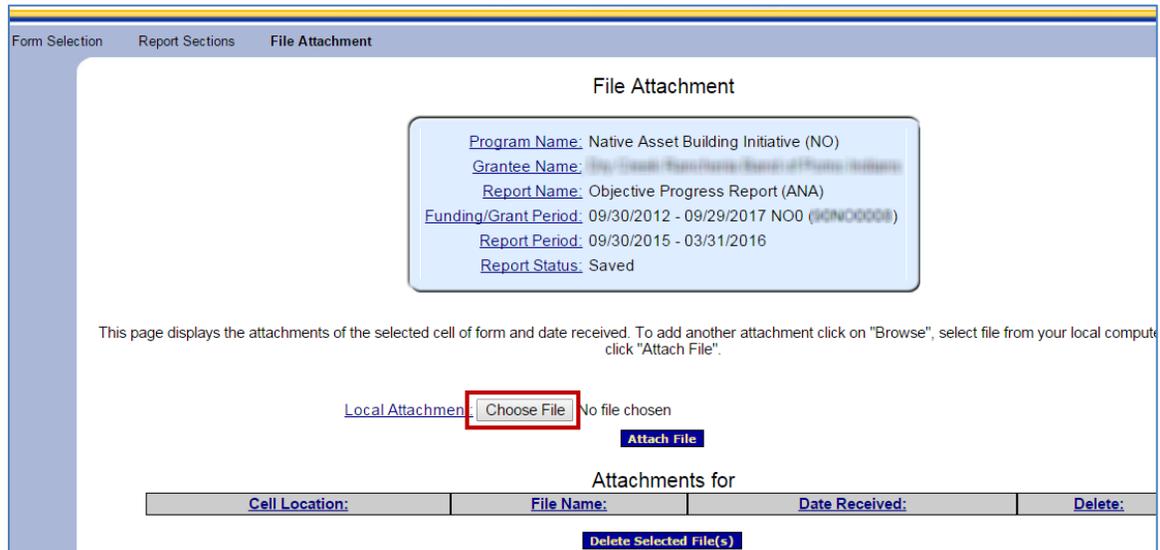


Figure 48: File Attachment screen

- Select the desired file and then click the **Open** button.

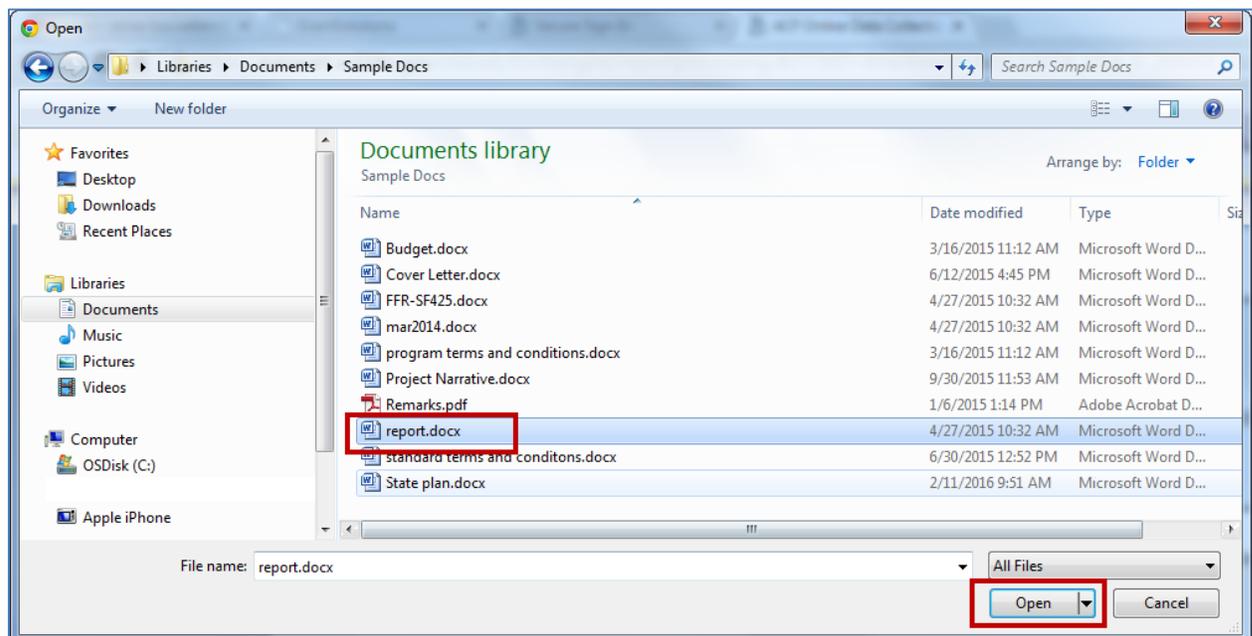


Figure 49: Open file window

12. From the “File Attachment” screen click the **Attach File** button.

This page displays the attachments of the selected cell of form and date received. To add another attachment click on "Browse" and click "Attach File".

Local Attachment: Choose File report.docx

Attach File

Attachments for

<u>Cell Location:</u>	<u>File Name:</u>	<u>Date Received:</u>
Delete Selected File(s)		

Figure 50: File Attachments screen - Attach File button

13. The file is now attached to the report. Add additional files as desired.

14. To view the file, click the **file name** link from *the File Name* column.

15. To delete the attached file, click the **checkbox** from the *Delete* column and click the **Delete Selected Files** button.

This page displays the attachments of the selected cell of form and date received. To add another attachment click on "Browse", select file from your local computer and click "Attach File".

Local Attachment: Choose File No file chosen

Attach File

Attachments for

<u>Cell Location:</u>	<u>File Name:</u>	<u>Date Received:</u>	<u>Delete:</u>
ANA OPR - Cover Page 10. Other Attachments:	REPORT.DOCX	02/26/2016	<input type="checkbox"/>
Delete Selected File(s)			

Figure 51: File Attachments screen

16. Return to the *Report Sections* screen to select a section to edit. Click the **Report Sections** link towards the top of the screen.

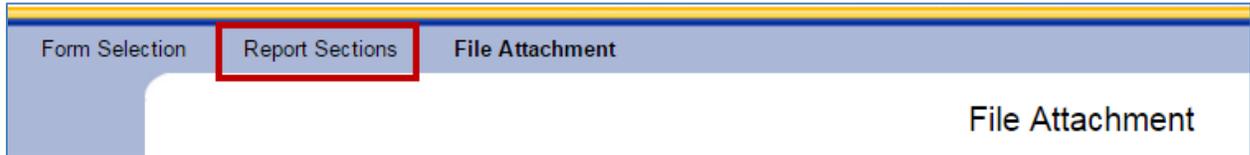


Figure 52: Report Sections navigation link

Validate

17. Once data is entered and saved for each section, the entire form must be validated. Validate checks the form for errors and missing data. Click **Validate** from a section or from the “Report Sections” screen.



Figure 53: Validate button

18. The screen refreshes and the status updates. If the report status is **Saved with Errors**, an error message appears at the top of the Report screen. The errors must be corrected and the report revalidated. Click the *Go to Error* link to go directly to the field in need of corrections. Click the *Long Description* link to view a description of the error.

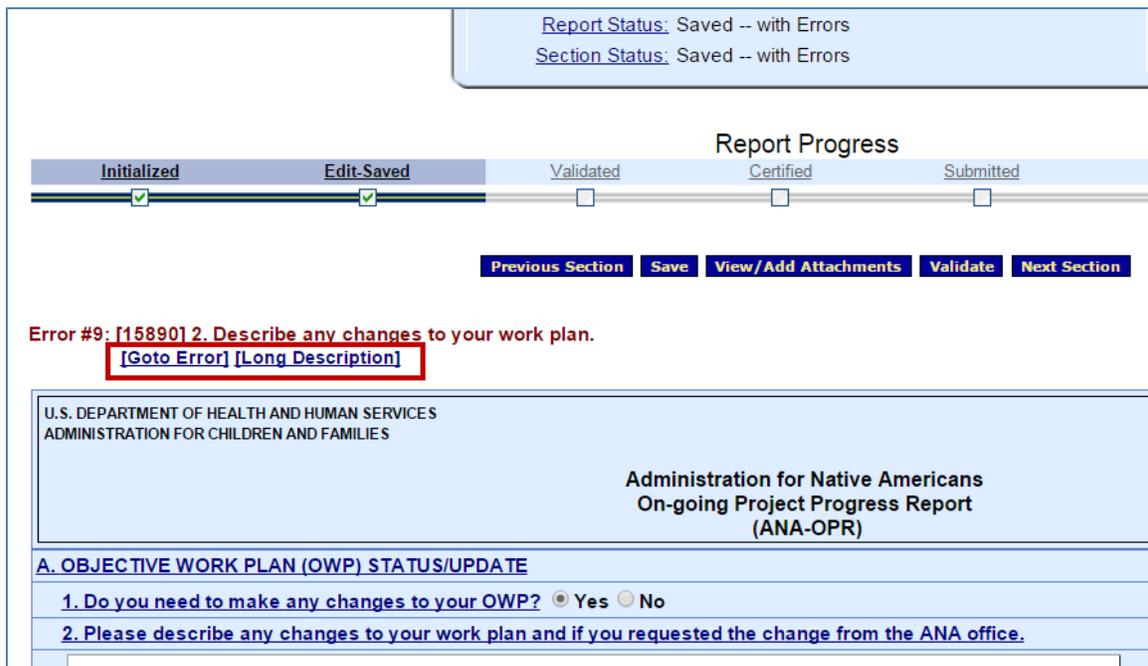


Figure 54: Validation error message - Go to Error and Long Description links

19. If the status is Saved with Warnings, the warnings can either be corrected or the report can still proceed through the approval process.

Warning #3: [15894] Current Status of Expected Results and Benefits for Objective 1.
[\[Goto Error\]](#) [\[Long Description\]](#)

Warning #6: [16219] Current Status of Expected Results and Benefits for Objective 2.
[\[Goto Error\]](#) [\[Long Description\]](#)

Warning #9: [16220] Current Status of Expected Results and Benefits for Objective 3.
[\[Goto Error\]](#) [\[Long Description\]](#)

A. Project Year 1

Please complete the tables below and include all objectives, results, benefits, activities and dates as they appear in the tables as necessary. In completing the 'Status of Activity' column please choose the status of the activity from the dropdown menu.

Figure 55: Report Warnings

Certify

20. After the entire report is successfully saved and validated (no errors), the Grantee Authorizing Official electronically signs the report. Click the **Certify** button from the “Report Sections” screen.



The screenshot shows a navigation bar with four buttons: "View/Add Attachments", "Validate", "Certify", and "Print Full Report". The "Certify" button is highlighted with a red rectangular box. Below the navigation bar is a table with a header row containing "Name:" and "Perform Action:". The "Perform Action:" column contains a dropdown menu labeled "Select Action:" and a "Go" button.

Figure 56: Report Sections screen - Certify button

21. A pop-up message appears stating “Changes made after saving and validating 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**.

Changes made after saving and validating 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.

OK

Cancel

Figure 57: Pop-up message

22. The “Cover Page” sections opens. In field 12b, select the **Click to Sign** button.

11. Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance in the award documents.	
12a. Typed or Printed Name and Title of Authorized Certifying Official	12c. Telephone (area code, number)
12b. Signature of Authorized Certifying Official	12d. Email Address
Click to Sign	12e. Date Report Submitted (Month/Day/Year)

Figure 58: Cover Page - Click to Sign button

23. The screen refreshes and the status is Certified. Click the **Report Sections** navigation link towards the top of the page.

Form Selection	Report Sections	Report	Report Form Status
----------------	------------------------	--------	--------------------

Figure 59: Report Sections navigation link

24. The “Report Sections” screen appears. Although the OPR is now locked down for changes, it can be UnCertified to open fields for modifications.

View Attachments UnCertify Submit Print Full Report		
Time:	Perform Action:	Section Status:
	Select Action: ▼ Go	Certified
	Select Action: ▼ Go	Certified
	Select Action: ▼ Go	Certified

Figure 60: Report Sections screen - UnCertify button

Submit

25. The last step is to electronically send the OPR to ANA. From the “Report Sections” screen, click the **Submit** button.



Figure 61: Report Sections screen - Submit button

26. A pop-up message appears stating “This will officially submit your report. Do you wish to continue?” Click **OK**.

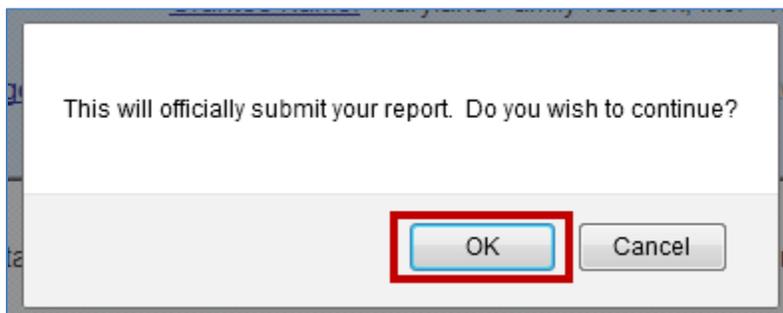


Figure 62: Pop-up message

27. A confirmation message appears stating “We have received your report. This page shows all reports we have received along with attachments.” Click **OK**.

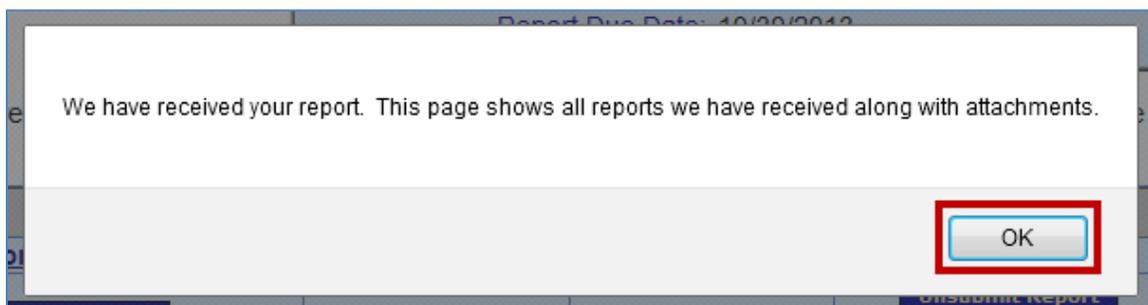


Figure 63: Confirmation message

28. The “Report Form Status” page appears and the report is in the Submitted status.

Report Form Status

Program Name: Native Asset Building Initiative (NO)
Grantee Name: [City of Seattle Department of Public Utilities - No. 42](#)
Report Name: Objective Progress Report (ANA)
Funding/Grant Period: 09/30/2012 - 09/29/2017 NO0 (#N000008)
Report Period: 09/30/2015 - 03/31/2016

This screen displays the status of report forms and their revisions, along with attached files. To continue entering report form information, click 'Grantee Selection'.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submitted	02/26/2016	Unsubmit Report	Print as PDF <input type="button" value="Go"/>

Original File Attachments

Attachment Type:	File Name:	Date Received:
ANA OPR - Cover Page 10. Other Attachments:	REPORT.DOCX	02/26/2016

Report Status History

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Submitted	02/26/2016 03:48:41 PM	Donald Duck	
Original	Certified	02/26/2016 03:45:46 PM	Donald Duck	Signed as Authorized

Figure 64: Report Form Status page

29. An email confirmation of the report submission is sent to designated grantors and grantees.

From: On-Line_Data_Collection_System@acf.hhs.gov
 To: [Walters, Ann-Cas \(ACF\) \(CTR\)](#)
 Cc:
 Subject: Received Submission of [\(FY2016\) Report Form SF-429 B](#)

Notification of Submission :

The Administration for Children and Families (ACF) has received the following:

Program : Native Asset Building Initiative

Grantee : [\(FY2016\) \(ACF\)](#)

Report : Objective Progress Report (ANA)

Figure 65: Email Notification of Submission

Report Form Status Page

The “Report Form Status” page is an excellent resource for following a report’s progress. From the Status page, easily check the OPR’s Status, Attachments, History, and Contact information.

Report Form Status Table

The *Report Form Status* table contains the following columns:

- **Report Submissions:** Depending on a report’s status, *Report Submissions* allows a user to either view submitted reports or edit reports in progress.
- **Report Status:** Tracks the steps a report has taken within OLDC. For example, a new report form displays an "Initialized" status. After a report is saved, the status changes to "Saved".
- **Status Date:** The last time a change was made to the report.
- **Action:** The *Action* a user can perform depends on the status of the report. For example, a Certified report can be Submitted from the Status page, and a Submitted report can be Unsubmitted as long as it is not yet under Review by Federal Staff.
- **Print:** Allows the user to view or print the report as a PDF.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submission Accepted by CO	02/17/2016		Print as PDF <input type="button" value="Go"/>

Figure 66: Report Form Status Page - Report Form Status table

File Attachments

All files attached to the OPR are available from the File Attachments sections.

Report Form Status				
Report Submissions: View Original	Report Status: Submitted	Status Date: 02/26/2016	Report Action: Unsubmit Report	Print: Print as PDF <input type="button" value="Go"/>
Original File Attachments				
Attachment Type: ANA OPR - Cover Page 10. Other Attachments:		File Name: REPORT.DOCX	Date Received: 02/26/2016	

Figure 67: File Attachments section

History

The Status page contains information about a report's History, such as the name of the person who validated the report and the date and time the action was taken.

Report Status History				
Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Submitted	04/18/2013 04:30:24 PM	Anna-Lisa Walters	
Original	Certified	04/18/2013 04:25:59 PM	Anna-Lisa Walters	Signed as Authorized Official
Original	Saved -- Validated	04/18/2013 04:09:57 PM	Anna-Lisa Walters	
Original	Saved -- with Errors	04/18/2013 04:09:37 PM	Anna-Lisa Walters	
Original	Saved -- with Errors	04/18/2013 03:59:23 PM	Anna-Lisa Walters	
Original	Saved	04/18/2013 03:20:31 PM	Anna-Lisa Walters	
Original	Saved -- with Errors	04/15/2013 03:58:28 PM	Anna-Lisa Walters	
Original	Saved	04/15/2013 03:57:27 PM	Anna-Lisa Walters	

Figure 68: Report Form Status Page - History

Contacts

A list of primary contact names, phone numbers, and e-mail addresses are listed under *Contacts* on the Status page.

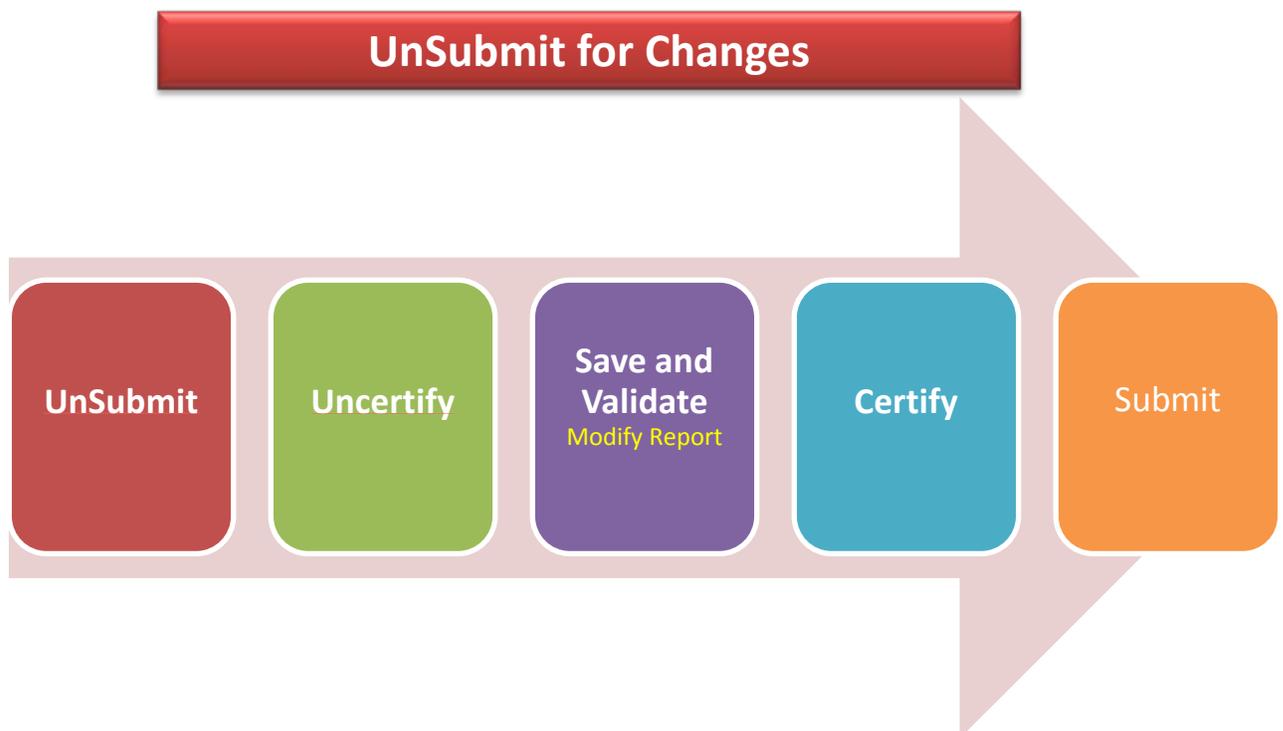
Contacts		
Contact Name:	Telephone #:	E-mail:
John Smith	(202) 555-1212	jsmith@email.com
Mary Jones	Not Available	mjones@email.com
Mike Dough	(202) 555-1212	mdough@email.com

Figure 69: Report Form Status Page - Contacts

Change a Submitted Report

When a report is submitted by the grantee but is not yet *In Review* by ANA, the grantee may take the report back to make changes. Contact ANA if the report is already in the Review status.

When a report is edited, it must be re-Validated, Certified, and Submitted to complete the process. Previous due dates apply.



Revisions

Once the OPR is approved, the process is complete. However, if a grantee needs to make a change, they have the option of creating a Revision.

A Revision is an exact duplicate of the Accepted OPR, only the data fields are open and modifications can be made. The original report does not change and can be accessed by clicking "View Original" from the Report Form Status page.

There is no limit to the number of Revisions for a single report. However, if a Revision is made after the OPR's due date, the Grantee is not able to submit the Revision and must instead contact the ANA for assistance.

Note: Revisions may only be created for the OPR. To request changes to the OWP, please contact ANA staff.

To create a revision:

1. Log into the GrantSolutions Grants Management Module (GMM) (www.grantsolutions.gov).
2. Click the menu Online Data Collection.

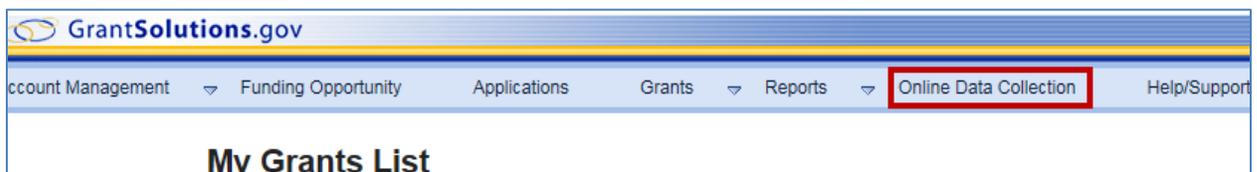


Figure 70: My Grants List - Online Data Collection menu

3. The OLDC "Home" screen appears. Click **Report Form Entry**.

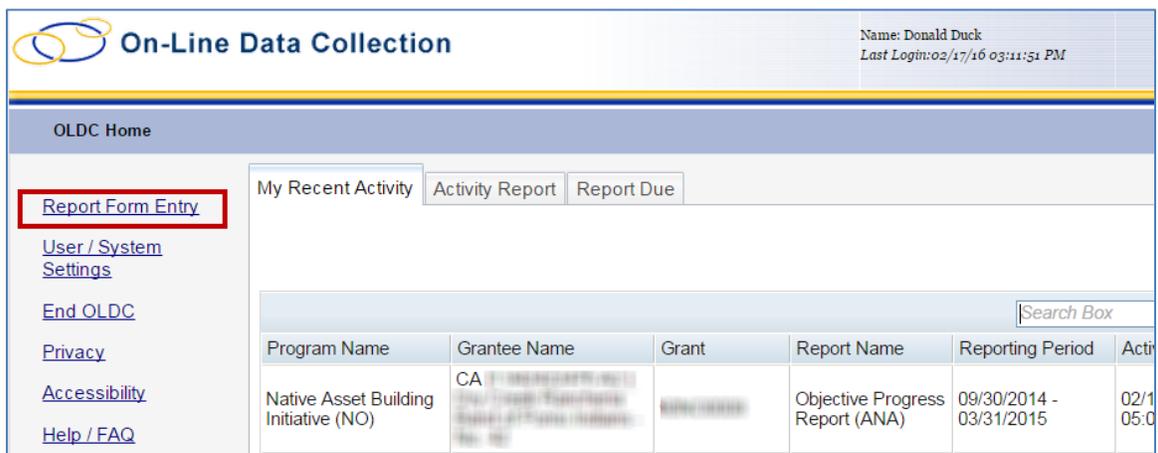


Figure 71: OLDC Home - Report Form Entry

- The “Form Selection” screen displays. Select the **Program Name**, **Grantee Name**, and **Report Name** (in that order).

Form Selection

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

Step 1: Program Name: Native Asset Building Initiative (NO) ▼

Step 2: Grantee Name: CA [[REDACTED]] (2011-----) [[REDACTED]] ▼

Step 3: Report Name: Performance Progress Report (ANA OPR) ▼

Figure 72: Form Selection screen - Steps 1-3

- The screen refreshes. Select the **Funding/Grant Period** from the drop-down list.
- Select the **Report Period** radio button.

Important: Ensure the Report Status is *Submission Accepted by CO*.

Step 3: Report Name: Performance Progress Report (ANA OPR) ▼

Step 4: Funding / Grant Period: 09/30/2012 - 09/29/2017 NOO ([REDACTED]) ▼

Step 5: Report Period:

	Reporting Period	Due Date	Type	Report Status
<input type="radio"/>	09/30/2012 - 09/29/2017	12/30/2017	Grant (Final)	
<input type="radio"/>	04/01/2017 - 09/29/2017	10/30/2017	Semi-Annual	
<input type="radio"/>	09/30/2016 - 03/31/2017	04/30/2017	Semi-Annual	
<input type="radio"/>	04/01/2016 - 09/29/2016	10/30/2016	Semi-Annual	
<input type="radio"/>	09/30/2015 - 03/31/2016	04/30/2016	Semi-Annual	Saved
<input checked="" type="radio"/>	09/30/2014 - 03/31/2015	04/30/2015	Semi-Annual	Submission Accepted by CO
<input type="radio"/>	04/01/2014 - 09/29/2014	10/30/2014	Semi-Annual	

Figure 73: Form Selection screen - Steps 4 – 5

- Select the Action **New/Edit/Revise Report**, and then click the **Enter** button.

<input type="radio"/>	04/01/2013 - 09/29/2013	10/30/2013	Semi-Annual
-----------------------	-------------------------	------------	-------------

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

Figure 74: Action - New/Edit/Revise Report and Enter button

8. The "Report Sections" screen opens. The screen appears exactly like the original report. However, the report name now also includes the **Revision number**.

Home Form Selection Report Sections Report Form Status

Report Sections

Program Name: Native Asset Building Initiative (NO)
Grantee Name: [Redacted]
Report Name: Objective Progress Report (ANA) **Revision # 1**
Funding/Grant Period: 09/30/2012 - 09/29/2017 NOO (90NO0008)
Report Period: 09/30/2014 - 03/31/2015

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

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](#) [Print Full Report](#)

Section Name:	Perform Action:	
ANA OPR - Cover Page	Select Action: <input type="button" value="Go"/>	Init

Figure 75: Report Sections screen - Revision #1

The submission of a Revision follows the exact same process as the submission of the original OPR: Initialize, Save, Validate, Certify, and Submit. If a Revision needs to be made after the due date is passed, the Federal Office may need to submit on behalf of the grantee.

When a Revision is submitted, the "Report Form Status" page appears. The most recent Revision is listed first in the Status table, followed by earlier Revisions, and ending with the original Accepted Report.

This screen displays the status of report forms and their revisions, along with attached files. To continue entering report form information, click on 'Grantee Selection'.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Revision # 1	Submitted	02/24/2016	Unsubmit Report	Print as PDF <input type="button" value="Go"/>
View Original	Submission Accepted by CO	02/17/2016		Print as PDF <input type="button" value="Go"/>

Figure 76: Report Form Status Page

Help Resources

The Center of Excellence Support Center provides assistance for GMM and OLDC customers.

Email: help@grantsolutions.gov

Phone: 866-577-0771

Hours: Monday through Friday 8 a.m. to 6 p.m. ET excluding Federal holidays

NOTES:

NOTES:



*The Grants Center
of Excellence*

Contact us:

www.grantsolutions.gov

1.866.577.0771

202.401.5282