GrantSolutions

GrantSolutions

PARTNERS IN INNOVATION

GrantSolutions Introduction to the Online Data Collection (OLDC) System

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Introduction

The Online Data Collection (OLDC) system is a convenient electronic method for submitting grant forms. Report forms can be submitted quickly over the Extranet (secure Internet site), new forms are added and form modifications are made continuously, and rule validation and checks can be added or modified in concurrence with policy changes.

OLDC is a role-based system, which means that permissions can be customized to meet the needs of each person. All users are given a Job Type (a title in the system such as Grant Director) which consists of a group of roles (assigned permissions). For example, the Data Entry Job Type contains the roles create, edit, validate, and attach documents to report forms. Other Job Types have fewer capabilities but are often assigned additional roles. For example, the Grant Director has the Certify role but is also sometimes given the Submit role.

Lesson 1: Accessing OLDC

1. After logging in to GrantSolutions, the "Portal" screen displays. To access OLDC, click the **Post Award Monitoring** option.
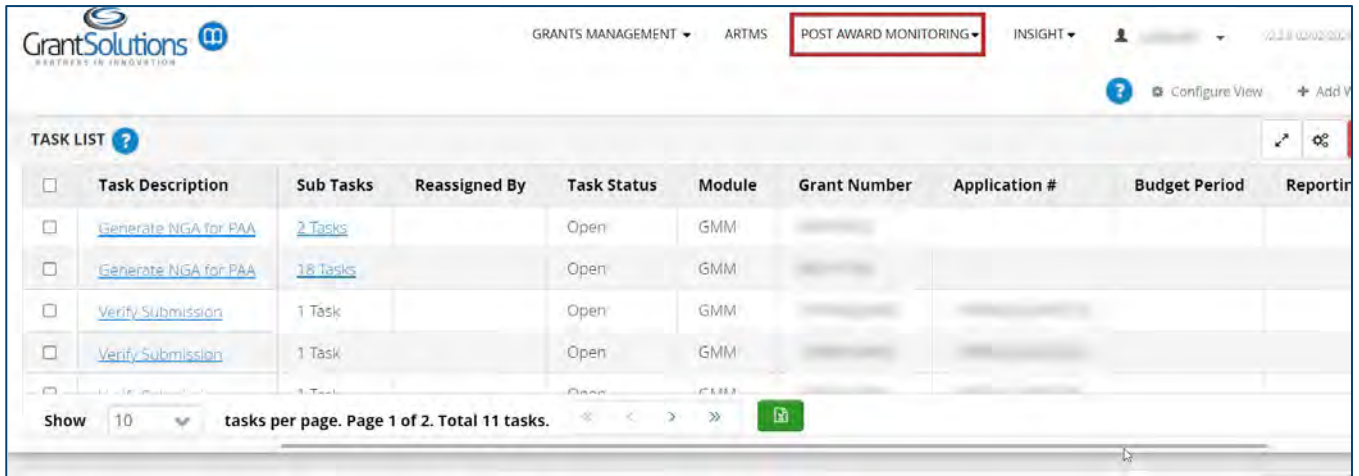

Figure 3: Portal screen – Post Award Monitoring option
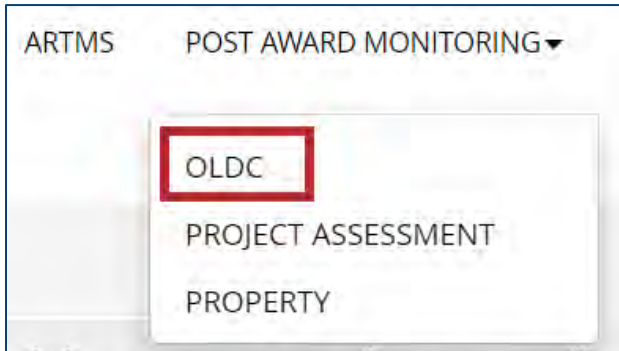
2. Click the **OLDC** option.

Figure 4: Portal screen – OLDC option

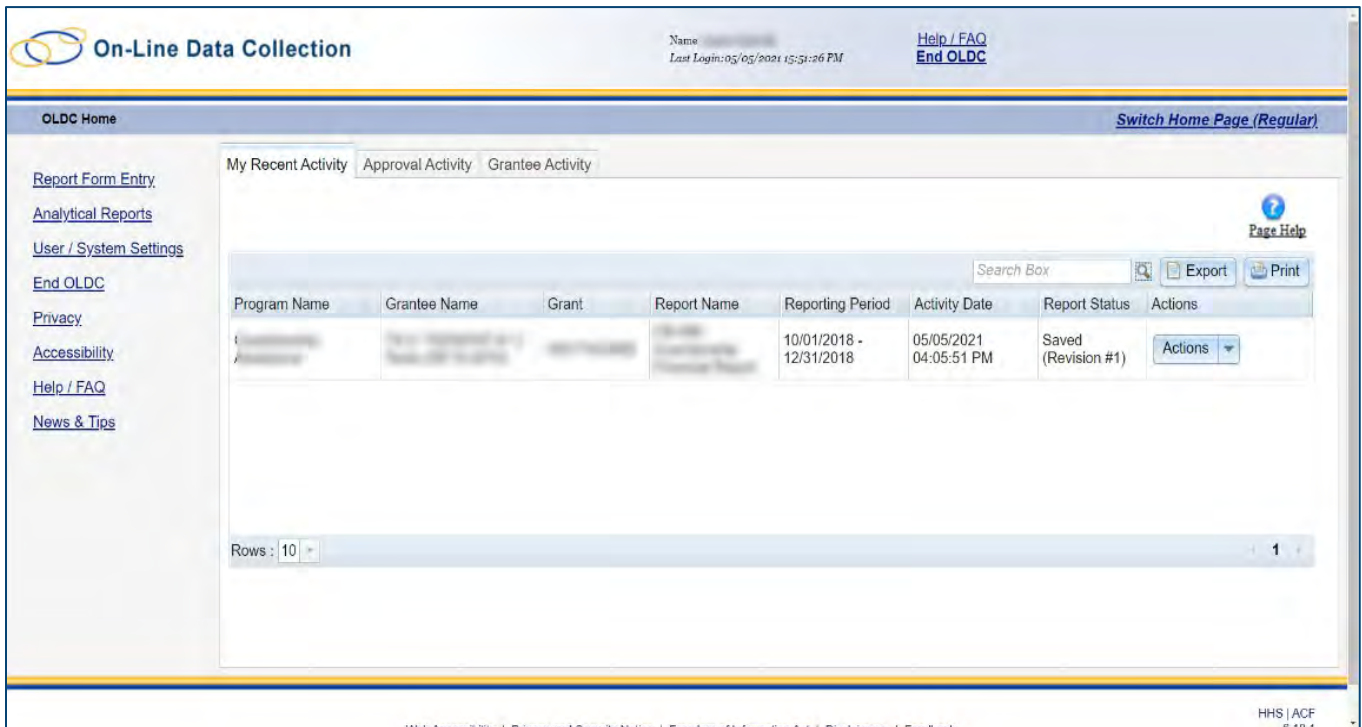The OLDC "Home" page displays in a new tab.

Figure 5: OLDC Home page

Lesson 2: Switching Experiences

The Online Data Collection (OLDC) has undergone an upgrade and introduced the Enhanced Home page.

OBJECTIVES

At the end of this lesson, the user will be able to:
- Switch to the Regular "Home" page
- Switch to the Enhanced "Home" page

SWITCH BETWEEN THE ENHANCED "HOME" PAGE TO THE REGULAR "HOME" PAGE

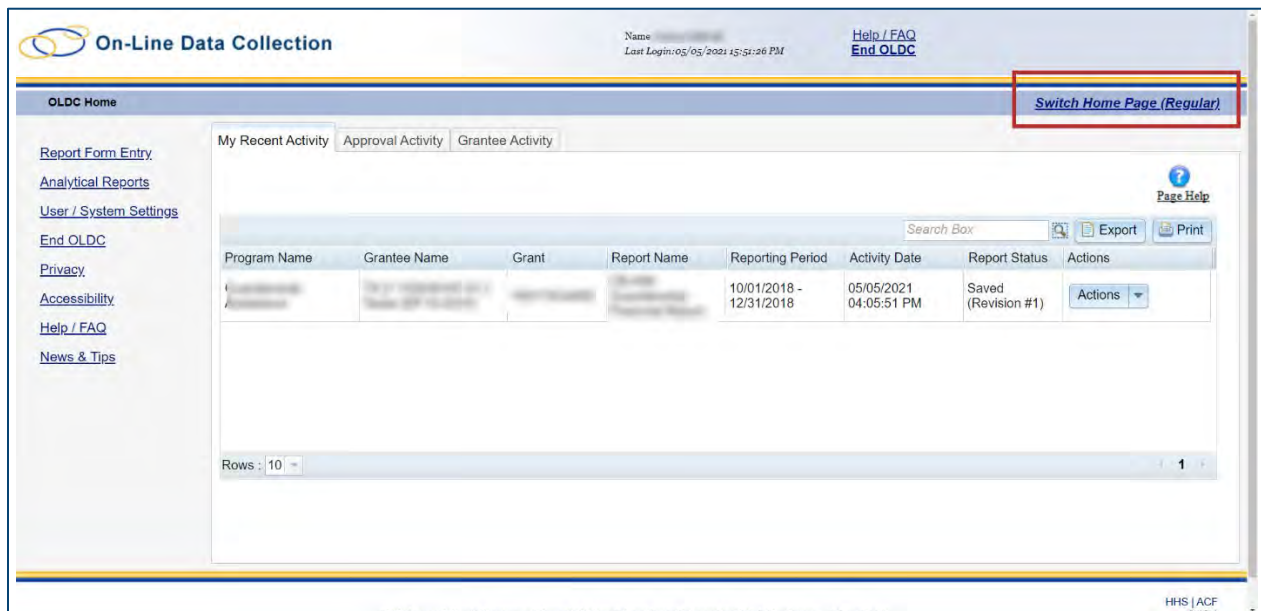1. From the Enhanced "Home" page, click the **Switch Home Page (Regular)** link.

Figure 6: OLDC – Switch Home Page (Regular) link

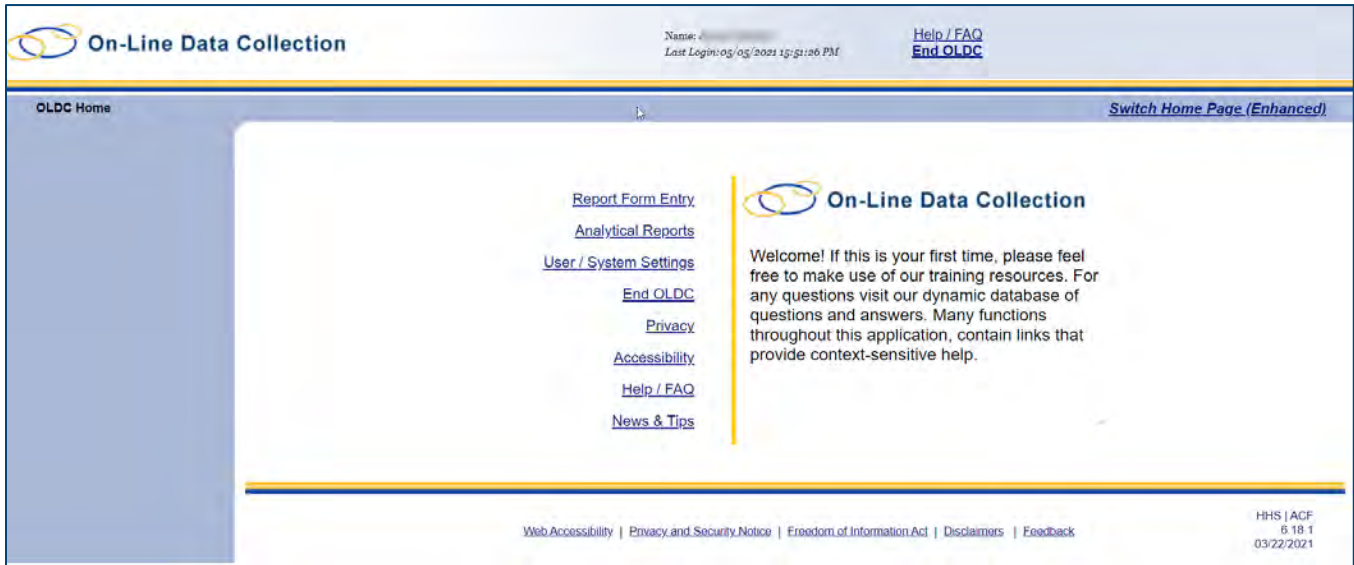The page will reload and the regular "Home" page will display.

Figure 7: OLDC Regular Home page

SWITCH BETWEEN THE REGULAR "HOME" PAGE TO THE ENHANCED "HOME" PAGE

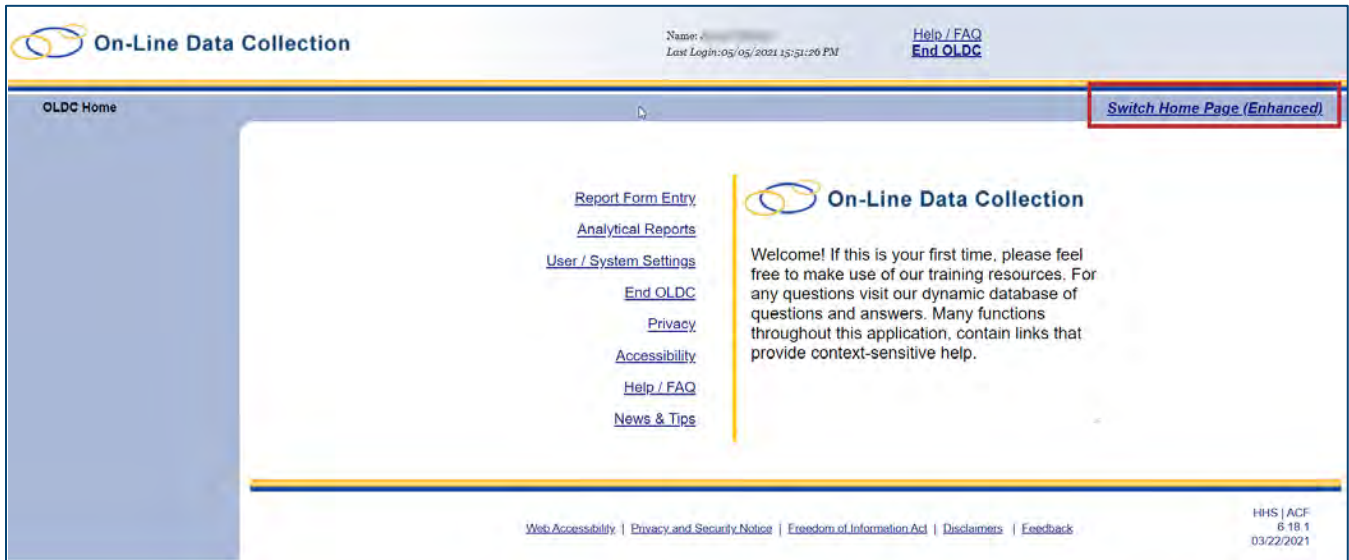1. From the Regular "Home" page, click the **Switch Home Page (Enhanced)** link.

Figure 8: OLDC – Switch Home Page (Enhanced) link

2. The page will reload and the Enhanced "Home" page will display with a pop up asking if you want to make the Enhanced "Home" page your default home page. Click **Yes** or **No**.

Note: It is recommended that the Enhanced "Home" page be the default home page.
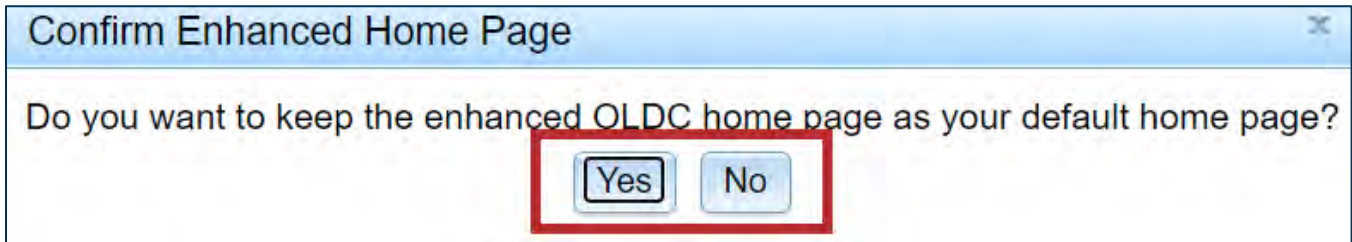
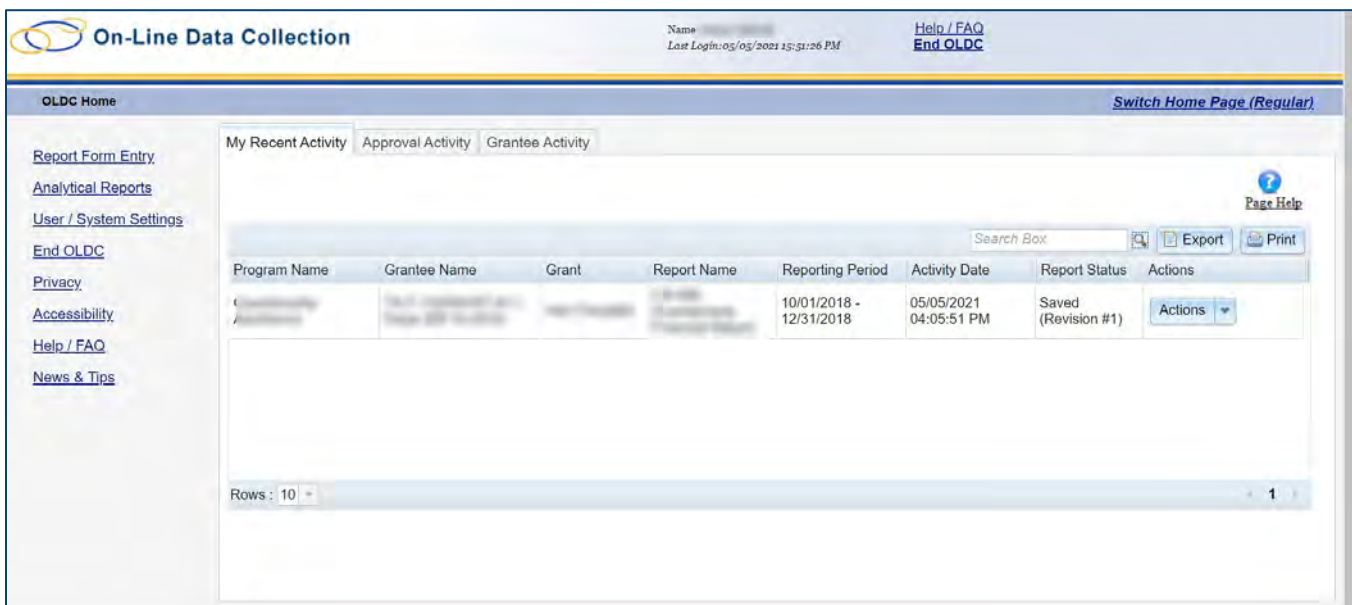

Figure 9: OLDC Prompt

Figure 10*: OLDC Enhanced Home page*

Lesson 3: Navigation

OBJECTIVES

At the end of this lesson, the user will be able to:
- Access OLDC features using the main menu
- Navigate OLDC via the Navigation Bar

OVERVIEW

On the OLDC "Home" page, the main menu is available. From the main menu, users may access grant forms, obtain information about the OLDC system, view news and tips, and End OLDC.
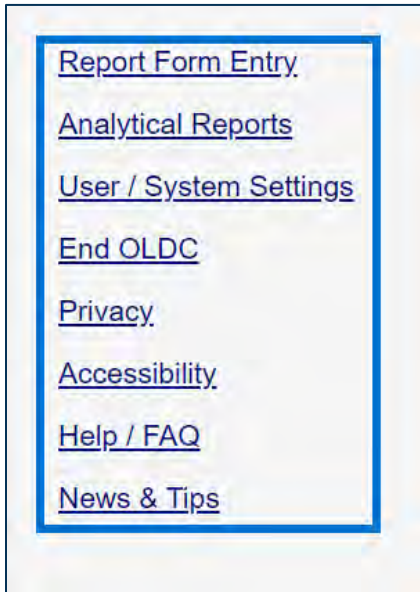

Figure 11: OLDC Home – Main Menu

Workflow Status	Possible Grant Recipient Actions
Report Form Entry	Access OLDC forms
Analytical Reports	Do not use.
User / System Settings	Customize the OLDC experience using the User and System settings. The available options are dependent on the roles assigned to the user.
End OLDC	Close the OLDC session.
Privacy	Access the HHS Privacy Policy Notice.
Accessibility	Access the HHS' Role in Accessibility.
Help / FAQ	Access the public website FAQ page.
News & Tips	Access Online Data Collection Resources.

TOP OF THE OLDC PAGES

The top of each OLDC screen contains the links End OLDC and Help/FAQ. Use End OLDC to exit the system, and the Help/FAQ link to find assistance on using the system.
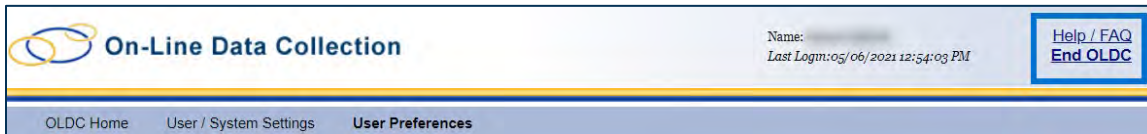

Figure 12: OLDC Help/FAQ link and End OLDC link

Located towards the top of the screen is the Navigation bar (breadcrumbs). This can be used to navigate through OLDC.

Note: The links display as different screens are accessed. Click any of the links in the Navigation bar to return to a previous screen in OLDC.

Note: Use the *Report Form Status* link to navigate to the Report Form Status page. Once on the Report screen, the Status page is always visible. It is there so a user does not have to return to the Report Period Selection screen to view the history, delete the report, etc.

Figure 13: OLDC Navigation bar

USER / SYSTEM SETTINGS

To customize the way OLDC is used, access the User / System Settings page.

To change user preferences:
1. On the OLDC "Home" page, click the **User / System Settings** link on the main menu.

Figure 14: OLDC Home – User / System Settings link

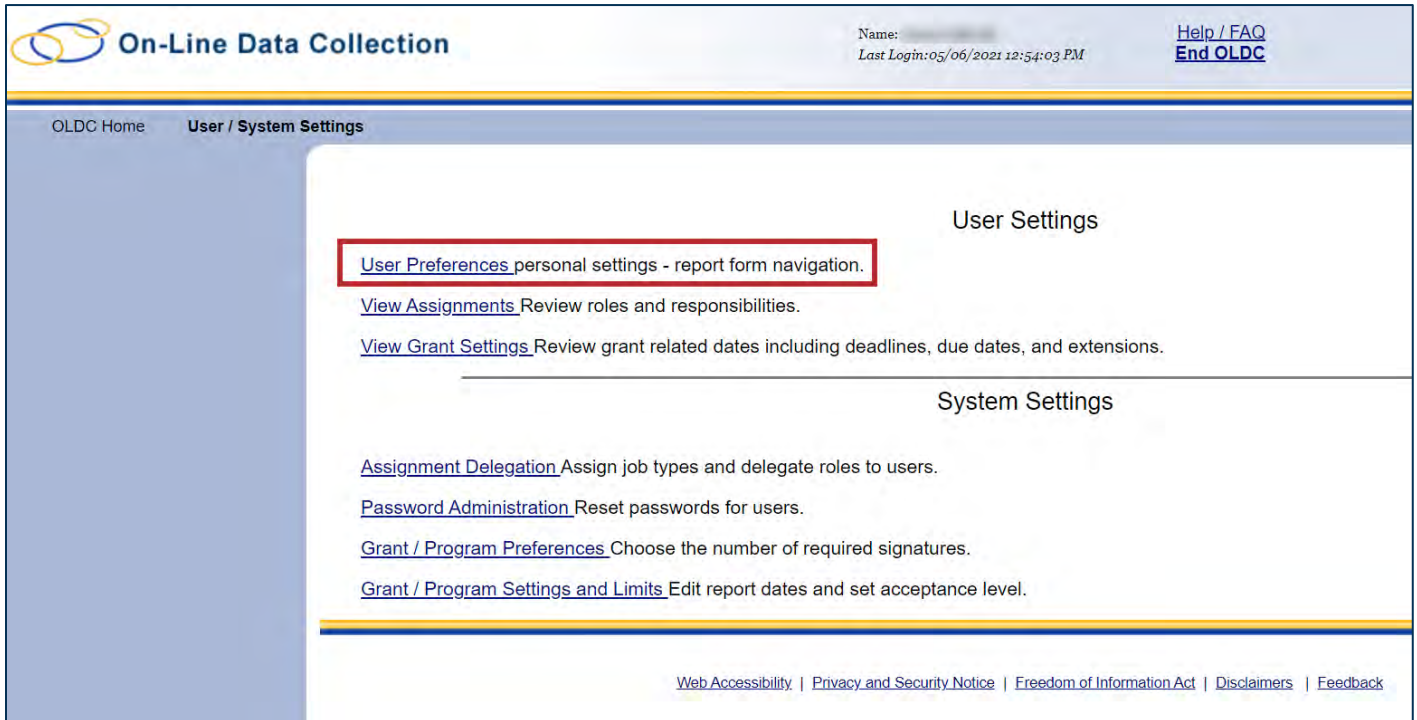2. On the "User / System Settings" page, click the **User Preferences** link.

Figure 15: User / System Settings page – User Preferences link
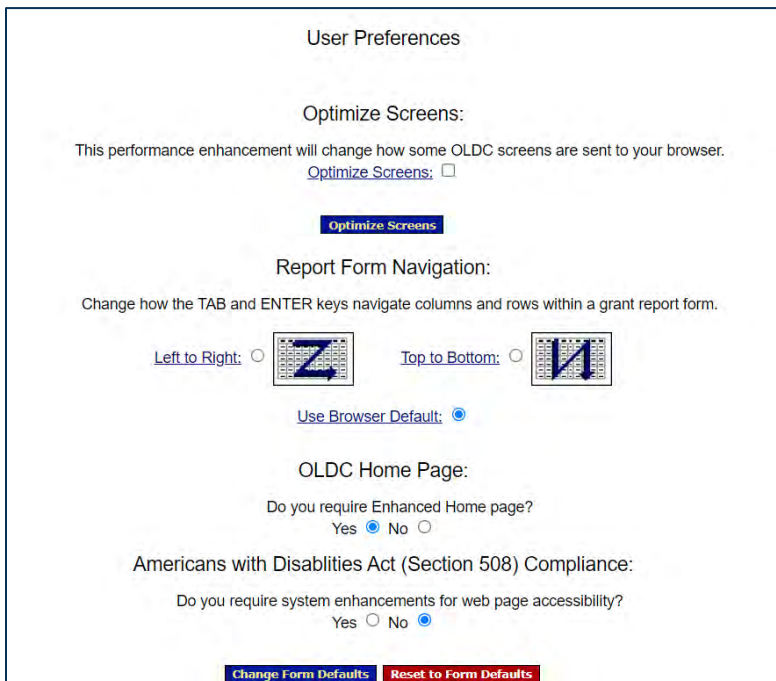
The "User Preferences" page displays.

Figure 16: User Preferences page

3. To optimize screens in OLDC, click the **Optimize Screens** checkbox.
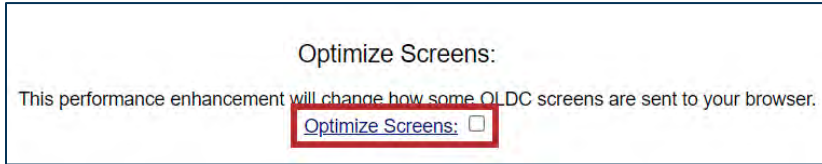

Figure 17: User Preferences - Optimize Screens checkbox

4. To change how rows and columns are navigated, click the **Left to Right**, **Top to Bottom** radio button, or the **Use Browser Default** radio button.

Figure 18: User Preferences - Left to Right, Top to Bottom radio button, and the Use Browser Default radio button

5. To change the default OLDC "Home" page, click **Yes** or **No** on the **Do you require the Enhanced Home page** radio button.
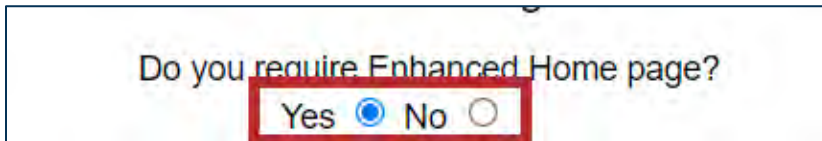

Figure 19: User Preferences - Do you require the Enhanced Home page radio button

6. OLDC also offers an option to use browser enhancements to assist people with disabilities. Under the *Americans with Disabilities Act (Section 508)* section, click the **Yes** or **No** on the **Do you require system enhancements for web page accessibility** radio button
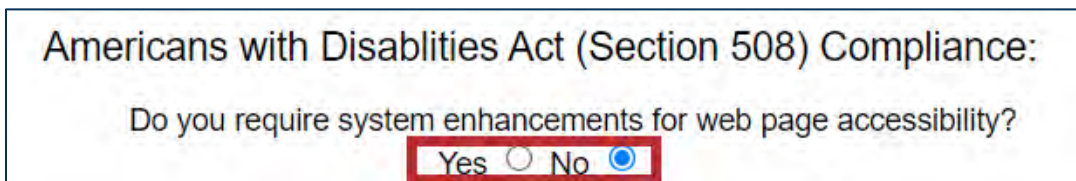

Figure 20: User Preferences - Do you require system enhancements for web page accessibility radio button

7. To save the preferences, click the **Change Form Defaults** button.

Figure 21: User Preferences – Change Form Defaults button

Lesson 4: Report Forms

OBJECTIVES

At the end of this lesson, the user will be able to:
- Select the desired Report Form
- Save data
- Validate Report Form
- Certify Report Form
- Submit Report Form to ACF
- Utilize the Report Form Status page

ACCESS REPORT FORMS

Report Forms are electronic versions of HHS Grant Report forms. The following section provides step-by-step instructions for working with Report Forms. Since not all forms in OLDC are the same, options on the selection screens may vary depending on form type.

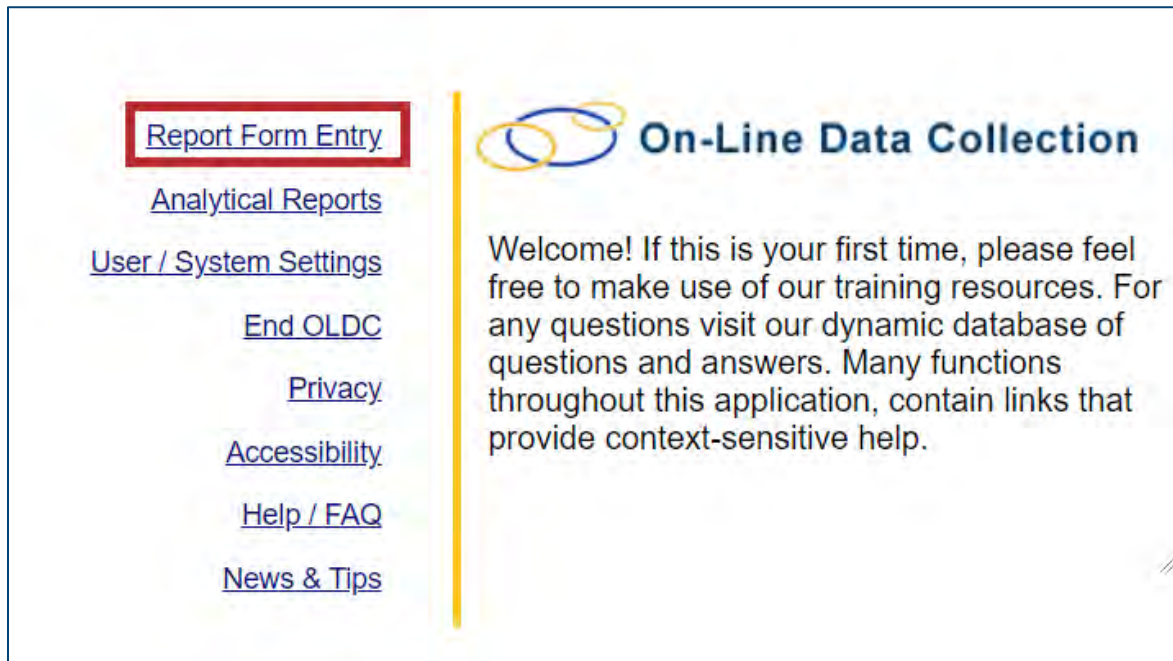1. From OLDC "Home", select the **Report Form Entry** link.

Figure 22: OLDC Home screen – Report Form Entry link

2. The "Form Selection" screen displays. Select a Program from the **Program Name** drop-down.

Note: Select the Program Name, Grantee Name, and Report Name in that order to initiate new reports, edit existing, or view reports.
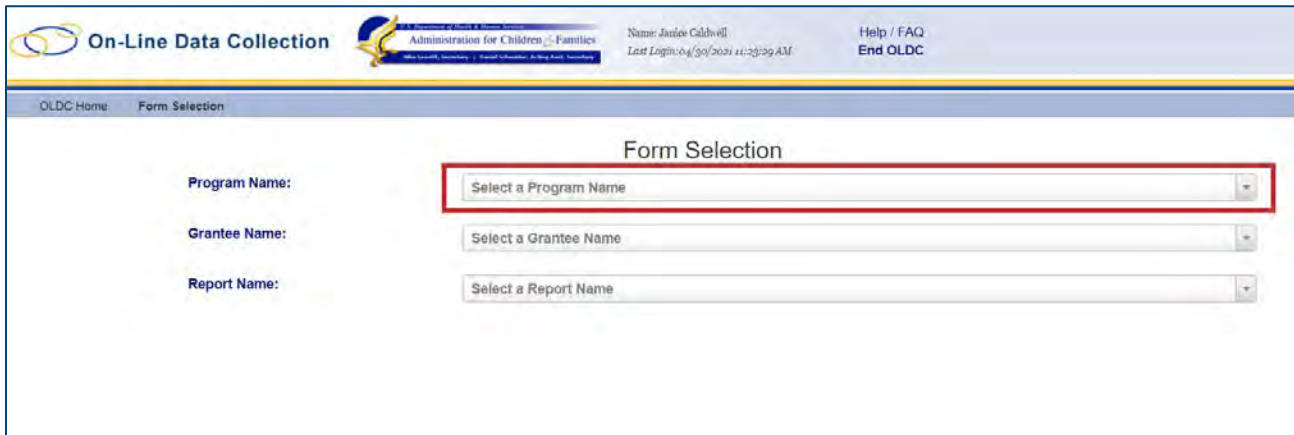

Figure 23: Form Selection screen – Program Name drop-down

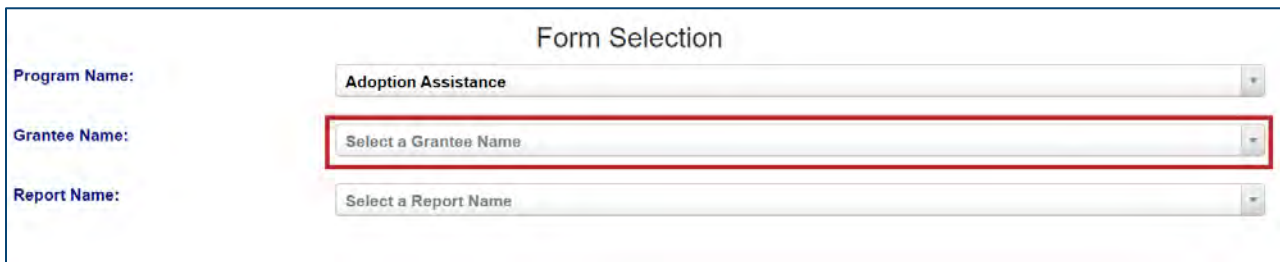3. Select a Grantee from the **Grantee Name** drop-down.

Figure 24: Form Selection screen – Grantee Name drop-down

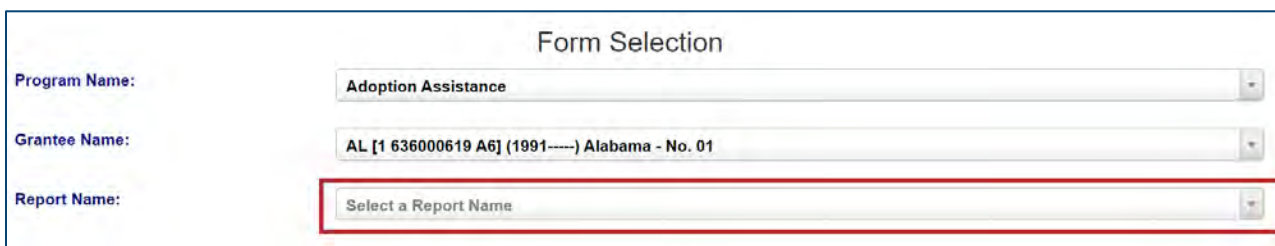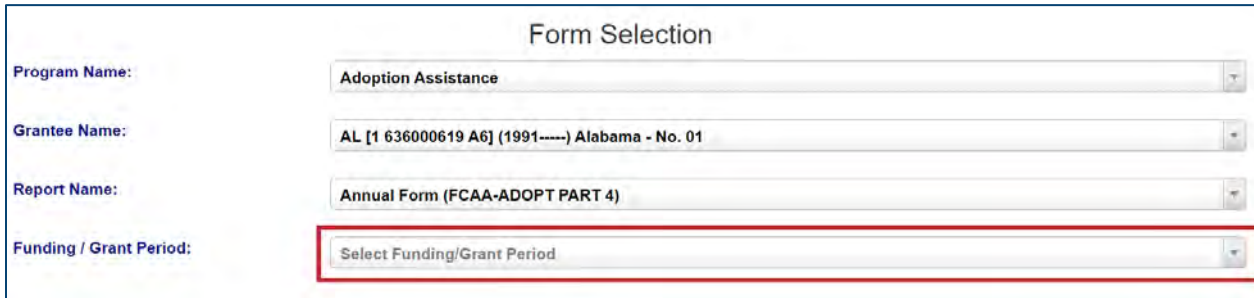4. Select a Report from the **Report Name** drop-down.

Figure 25: Form Selection screen – Report Name drop-down

5. Once the Report Type is selected, the screen refreshes to display additional selection options. Select a Funding / Grant Period from the **Funding / Grant Period** drop-down.
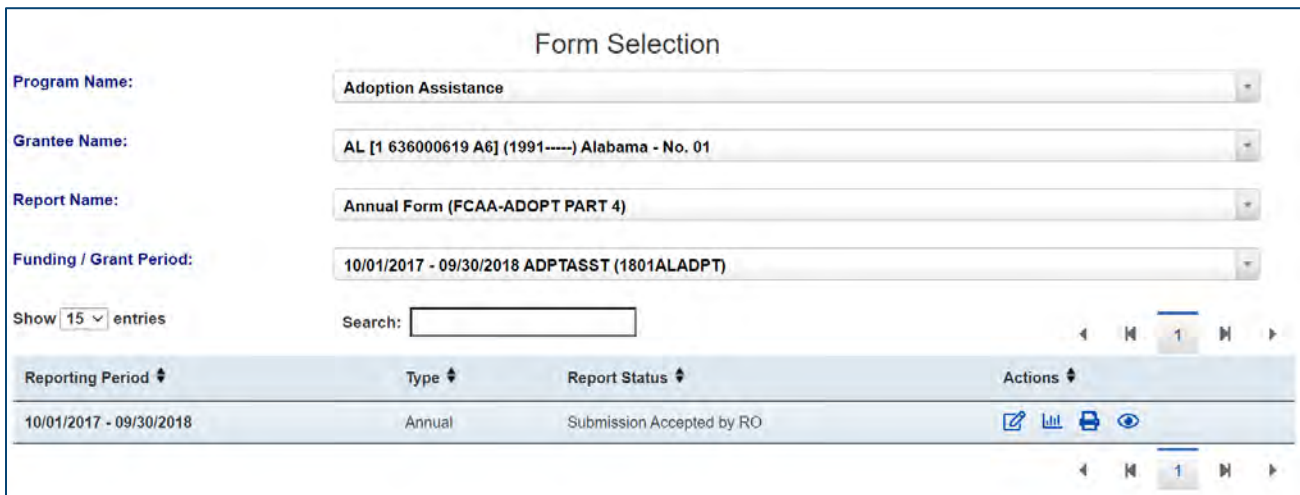

Figure 26: Form Selection screen – Funding / Grant Period drop-down

Once the Funding / Grant Period is selected, the screen refreshes to display the results below the search criteria.

Figure 27: Form Selection screen – Funding/Grant Period drop-down

The available actions are:

Actions Icon	Action
Create ✚	Initialize a new report
Clone Report 🗗	Create a new report from an existing report
Edit ✎	Edit an existing report
Revise 📄	Create a revision for a form that has already been completed and accepted by HHS
Report Status 📊	View the Report Form Status page
Print Latest Version (HTML) 🖶	Print the existing report
View Latest Report 👁	View the existing report

Note: Federal staff and Grantee staff with the Grant Administrator or Data Entry job type can Initialize a new form by default.

Furthermore, Federal and Grantee staff with the role "Revise Submitted Grant Form" can create a revision. The original report is retained for historical reference and is not changed.

Report Screens

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

Figure 28: OLDC Report screen with an Information box, Progress bar, Action buttons, and Data Entry box highlighted

Information Box

The Information box includes all the selections used to create the Report Form. When data has not yet been saved, the Report Status is Initialized.

Figure 29: OLDC Report screen- Information box

Progress Bar

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

The Recipient 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

Note: If applicable, some forms may include the status R/O Approved.
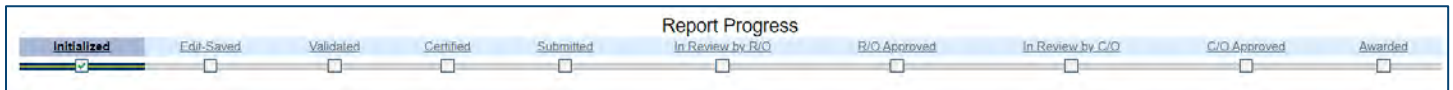
Figure 30: OLDC Report screen- Progress bar

Action Buttons

Below the Information box and Report Progress bar are Action buttons. Users with data entry capabilities can Save, View/Add Attachments, Validate, and Print. Action buttons are also available towards the bottom of the screen.
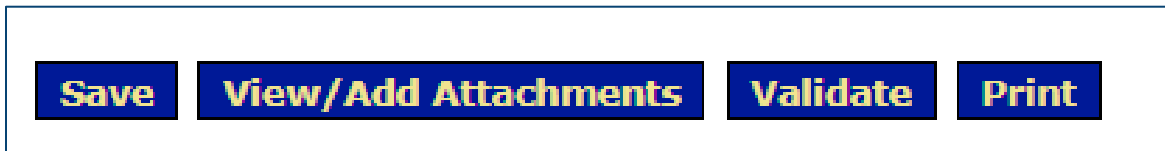
Figure 31: OLDC Report screen- Actions buttons

Data Entry

Below the Action buttons are the Report form. Click the blue underlined help links to view form instructions. Enter data in open fields.

Figure 32: OLDC Report screen- Help links and Data Entry boxes

The Report form has three types of data:
- Manual data entry - Open fields where you enter the figures
- Auto calculations - Closed fields that use formulas to automatically calculate figures based on numbers input. Values calculate on Save and/or Validate
- Validation – Mathematical checks based on numbers input and policy requirements

Note: To access the *OLDC Calculator*, double click on an open number field.
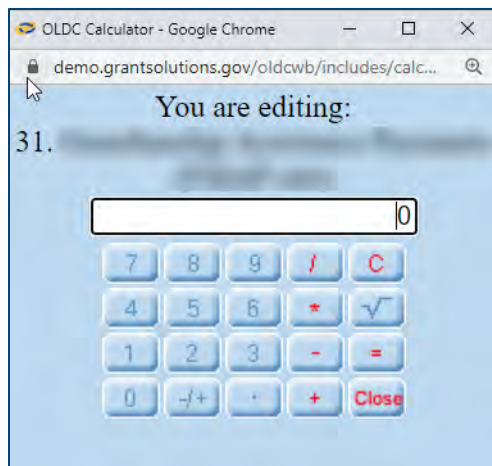
Figure 33: OLDC Calculator

SAVE, VALIDATE, CERTIFY, AND SUBMIT REPORT FORMS

Save a Report Form

1. On a report, enter data in any of the open **data entry** fields.

Section C: Guardianship Assistance Program				
50% FFP rate for all cost categories, except where noted	Current Quarter Claims Total (A)	Current Quarter Claims Fed Share (B)	Prior Quarter Adjustments Total (C)	Prior Quarter Adjustments Fed Share (D)
31. Guardianship Assistance Payments (FMAP rate)	$3,628,557	$2,111,457	$0	$0
32. Tribal/State Agreement Guard Assist Payments (Applicable FMAP Rate)	$0	$0	$0	$0
33. Administrative Costs - Agency	$74,000	$37,000	$246,226	$123,113

Figure 34: OLDC Reportscreen – data entry field

2. Click the **Save** button.

Save   View/Add Attachments   Validate   Print
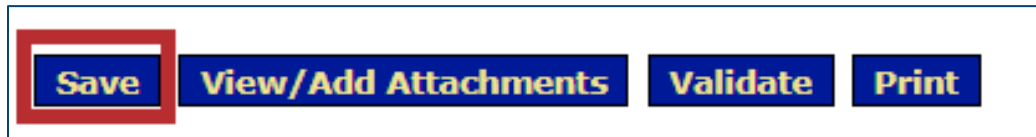
Figure 35: OLDC Report screen – Save button

Note: Save often to prevent losing data. Saving does not submit the form to ACF.

Once saved, the **Report Progress** bar changes to the *Edit-Saved* status.

Initialized	Edit-Saved	Validated	Certified	Submitted	In Review by R/O	R/O Approved	In Review by C/O	C/O Approved	Awarded
☑	☑	☐	☐	☐	☐	☐	☐	☐	☐

Report Progress
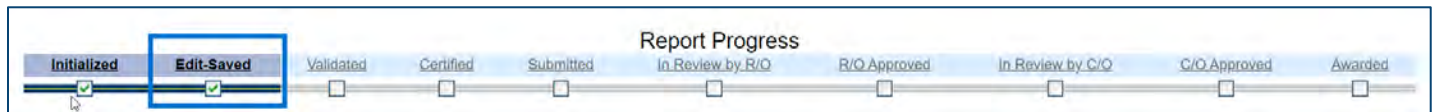
Figure 36: OLDC Report Screen – Edit Saved status

Validate a Report Form

Once data is entered and saved, the form must be validated. Validate checks the form for mathematical errors.

The possible *Report Statuses* are:

- Saved -- Validated: There are no errors and the form is 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 displays at the top of the form. Reports with errors cannot be certified and have the status "Saved with Errors". Errors must be corrected

1. Click the **Validate** button.
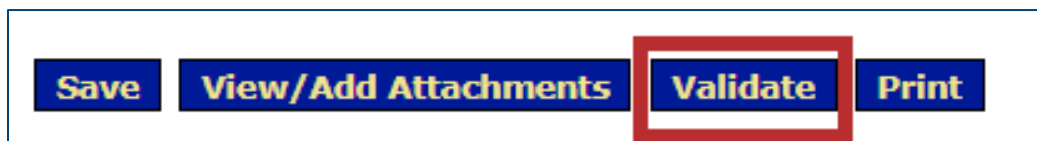
Figure 37: OLDC Report screen – Validate button

2. Reports with warnings or errors show a description of the issue under the *Actions buttons*. Click the **Long Description** link for more detailed information about the issue via a pop up.

Figure 38: OLDC Report screen – Long Description link

3. Click the **Go to Error** link to jump to the field on the screen that has the issue.

Figure 39: OLDC Report screen – Go To Error link

4. After correcting any errors, revalidate the form.
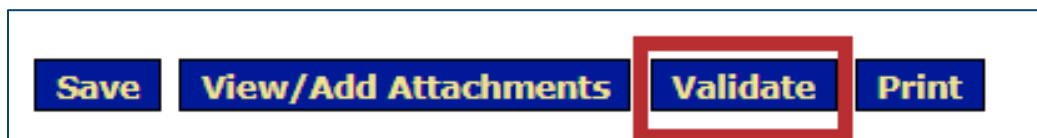
Figure 40: OLDC Report screen – Validate button

Certify a Report Form

After a report form has been successfully validated, a person with the appropriate role can Certify the report form with a digital signature.

1. Click the **Certify** button.

Figure 41: OLDC Report screen – Certify button

2. The message "Changes made after saving this form will be lost. You have the ability to sign in the signature are by pressing the Click to Sign button. This will complete your Certify process and officially sign this form" displays. Click the **OK** button.
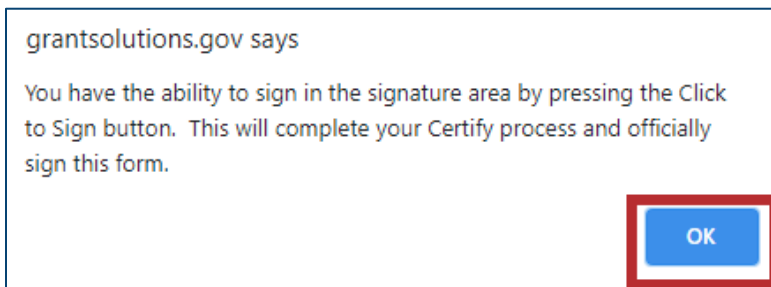
Figure 42: OLDC Pop Up – OK button

3. The screen jumps to the *Certification* section. Click the **Click to Sign** button.
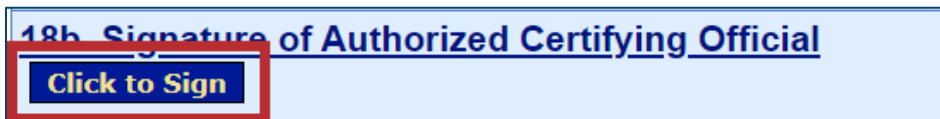
Figure 43: OLDC Report screen – Click to Sign button

The form has been officially signed and is in the *Certified* status. The form may be *Uncertified* while still in the *Certified* status by a person with the Certify role. The report form is now ready to be submitted.

Submit a Report Form

A user with the Submit role may now Submit the Report Form to the Program.

1. Click the **Submit** button.
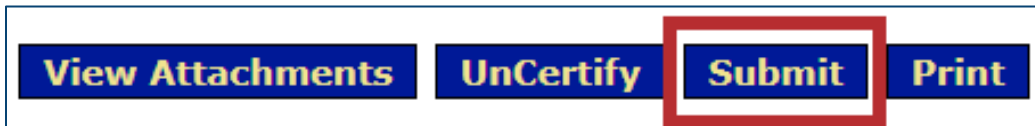
Figure 44: OLDC Report screen – Submit button

2. A warning message displays asking the user to verify if they want to submit the report. Click the **OK** button.

Figure 45: OLDC Pup up - OK button

3. A confirmation message displays stating the report has been received. Click the **OK** button.

Figure 46: OLDC Pup up - OK button

The "Report Form Status Page" displays and the "Report Form Status" page contains four sections.

Figure 47: OLDC Report Form Status Page

REPORT FORM STATUS PAGE

The "OLDC Report Form Status" page is an excellent resource for following a report's progress. From the Status page, a user can easily check a form's general information, History, Contact information, and Remarks.

Report Form Status

The "Report Form Status" section is broken down into 5 sections:
- 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 form has taken within the OLDC system. For example, a new report form displays an "Initialized" status. After a report form has been saved, the status changes to "Saved".
- Status Date: The last time a change was made to the report form.
- 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 or Reviewed by Federal staff.
- Print: This allows the user to view the report in print preview and then to send it to the printer.

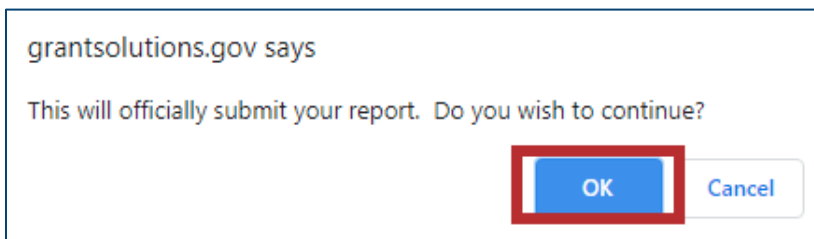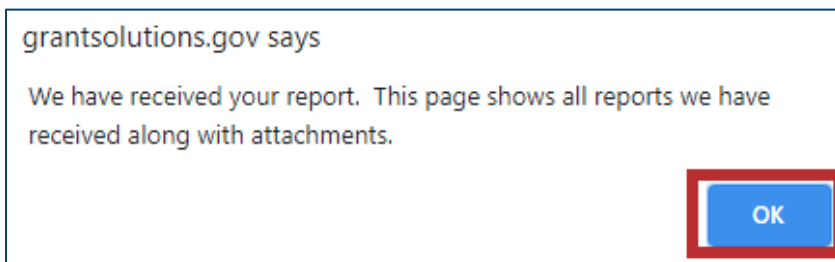| Report Form Status				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
View Revision # 1	Submitted	05/11/2021	Unsubmit Report	HTML Print Form ∨ Go
View Original	Submission Accepted by CO	11/30/2017		HTML Print Form ∨ Go
Revision # 1 File Attachments				
Attachment Type:	**File Name:**	**Uploaded Date:**	**Upload Status**	**Uploaded By**
Form Attachment		05/11/2021	Saved	Janice Caldwell
Original File Attachments				
Attachment Type:	**File Name:**	**Uploaded Date:**	**Upload Status**	**Uploaded By**

Figure 48: OLDC Report Form Status Page – Report Form Status section

History

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

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Revision # 1	Submitted	05/11/2021 12:39:12 PM		
Revision # 1	Certified	05/11/2021 12:36:08 PM		Signed as Authorized Official
Revision # 1	Saved -- Validated	05/11/2021 12:36:01 PM		
Revision # 1	Validated - with Warnings	05/11/2021 12:33:45 PM		Un-certified for edit
Revision # 1	Certified -- with Warnings	05/11/2021 12:29:36 PM		Signed as Authorized Official
Revision # 1	Validated - with Warnings	05/11/2021 12:24:51 PM		
Revision # 1	Saved -- with Errors	05/11/2021 12:20:10 PM		
Revision # 1	Validated - with Warnings	05/11/2021 12:19:30 PM		
Revision # 1	Validated - with Warnings	05/11/2021 12:19:08 PM		
Revision # 1	Validated - with Warnings	05/11/2021 12:18:44 PM		

Report Status History — Show 10 entries — Search: — Showing 1 to 10 of 17 entries — Previous 1 2 Next

Figure 49: OLDC Report Form Status Page – History section

Contacts

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

Figure 50: OLDC Report Form Status Page – Contacts section

Status Types and Definitions

Status Type	Status Definition
Initialized	A new report form has been created but has not yet been saved.
Saved	The report form has been saved, but that does not mean the report is complete or accurate.
Saved -- with Errors	The report form is saved and validated (i.e., calculations, required fields, and data accuracy are checked), and there are errors on the saved form. Reports with this status cannotbe submitted.
Saved -- Validated	The report form has been validated (i.e., calculations, required fields, and data accuracy are checked), and thereare no errors on the saved form.
Saved – with Warnings	The report form has been validated (i.e., calculations, required fields, and data accuracy are checked), and there are some errors on the saved form. However, the form maystill be certified and submitted.
Certified	The report form has been signed by an authorizing official but has not yet been submitted to ACF.
Submitted	The report form has been certified (signed) and sent to ACF.
Submission in Review by CO	Central Office is reviewing the report.
Submission Returned by CO	Returned to either the Region or Recipient for changes to be made.
Submission Accepted by CO	The report form has been accepted by Central Office and isno longer editable by the Recipient.

Lesson 5: Review, Approve, or Reject Report Forms

OBJECTIVES

At the end of this lesson, the user will be able to:
- Review a Report Form
- Approve a Report Form
- Reject a Report Form

REVIEW A REPORT FORM

After an OLDC Report Form is Submitted, Federal Staff must click the *Review* button from the "Status Page" to take ownership. Once the Report Form is under Review, the Recipient can no longer make changes.

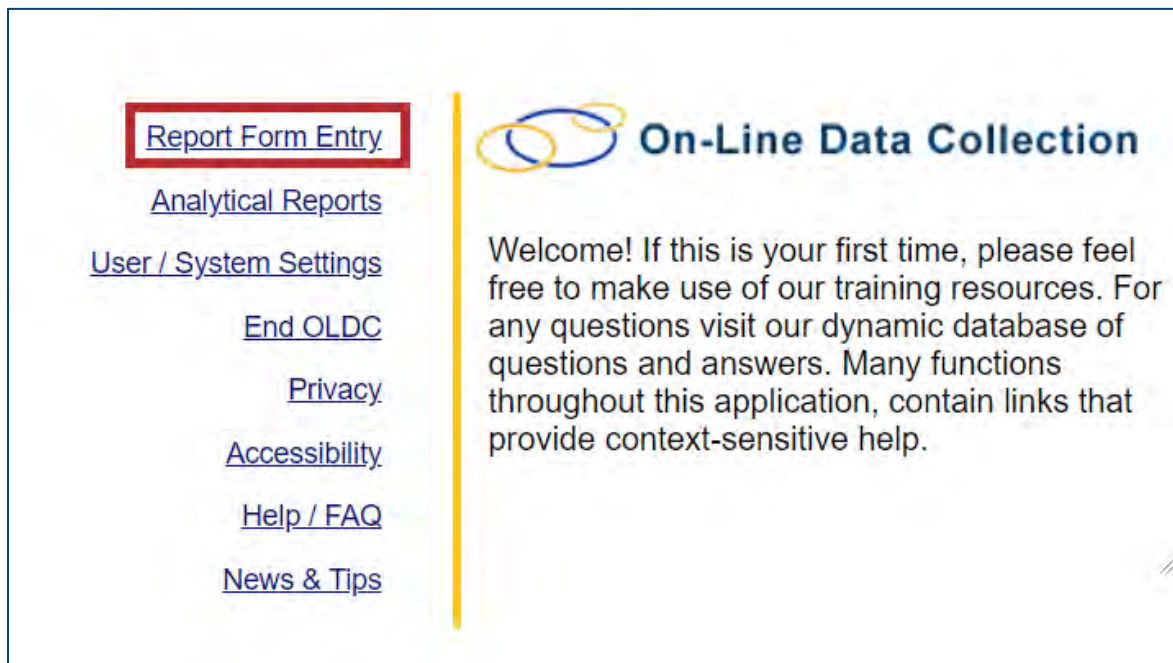1. From OLDC "Home", select the **Report Form Entry** link.

Figure 51: OLDC Home screen – Report Form Entry link

2. The "Form Selection" screen displays. Select a Program from the **Program Name** drop-down.

Note: Select the Program Name, Grantee Name, and Report Name in that order to initiate new reports, edit existing, or view reports.
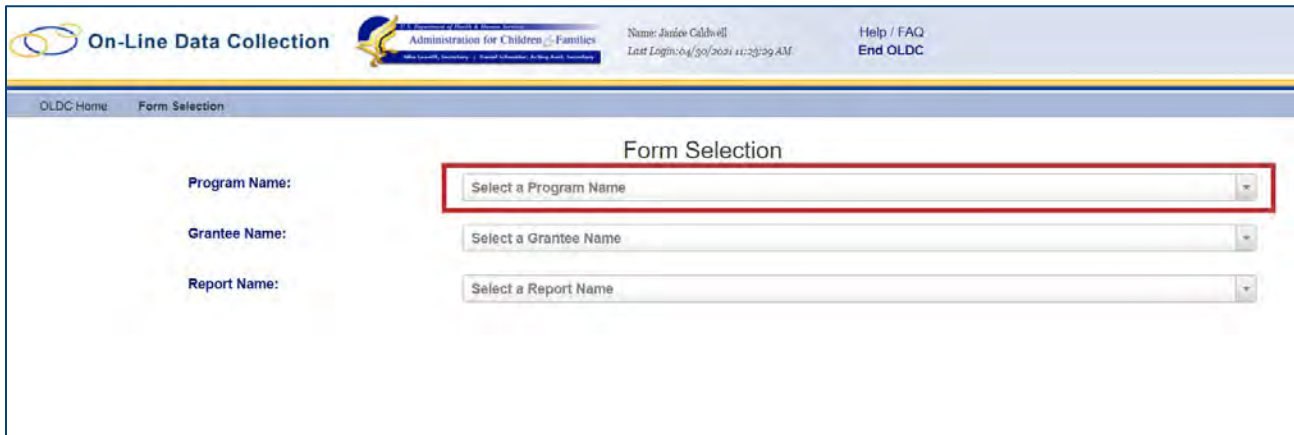

Figure 52: Form Selection screen – Program Name drop-down

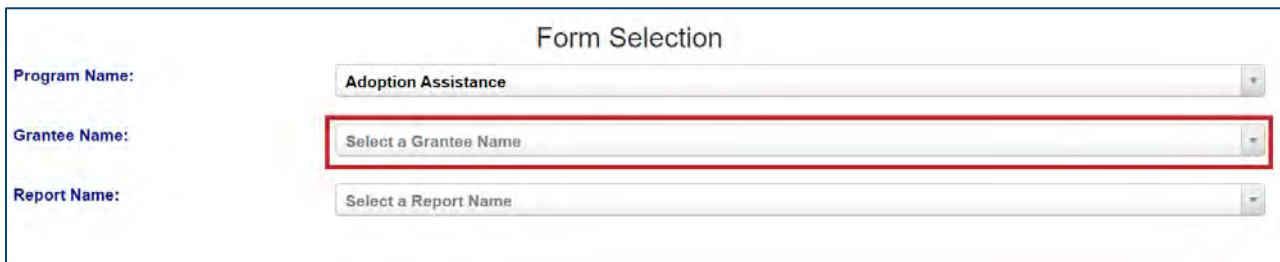3. Select a Grantee from the **Grantee Name** drop-down.

Figure 53: Form Selection screen – Grantee Name drop-down

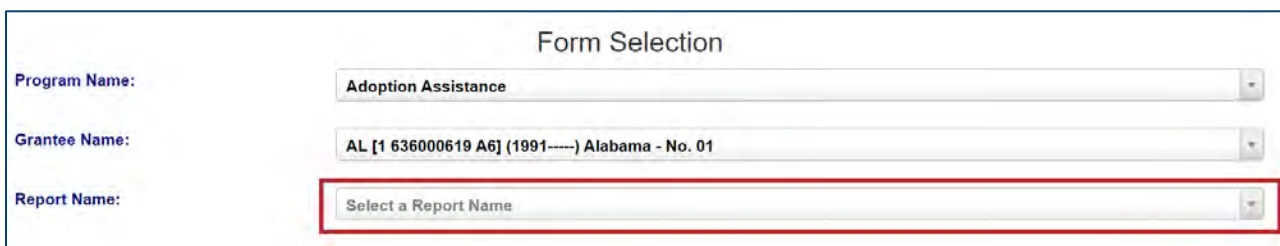4. Select a Report from the **Report Name** drop-down.

Figure 54: Form Selection screen – Report Name drop-down

5. Once the Report Type is selected, the screen refreshes to display additional selection options. Select a Funding / Grant Period from the **Funding / Grant Period** drop-down.

Figure 55: Form Selection screen – Funding / Grant Period drop-down

6. Once the Funding / Grant Period is selected, the screen refreshes to display the results below the search criteria. Click the **Report Status** icon.

Figure 56: Form Selection screen – Report Status icon.

7. The "Report Form Status" screen displays. Under the *Report Actions* category, click the **Review** button.

Figure 57: Report Form Status screen – Review button

The "Report" screen displays and the Report Status is "Submission in Review by CO" or "Submission in Review by RO" depending on the workflow. The Report may now be either *Approved* or *Rejected* by the office.

APPROVE A REPORT FORM

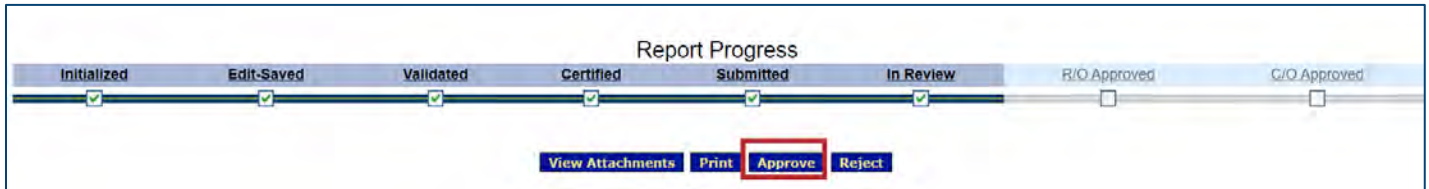1. From the "Report" screen, click the **Approve** button.

Figure 58: Report screen – Approve button

The "Report Form Status" page displays. The process is complete and Revisions may be initiated.

REJECT A REPORT FORM

At this stage in the process, if a problem is found that the Grantee must correct, the Report may be rejected.

1. From the "Report" screen, click the **Reject** button.
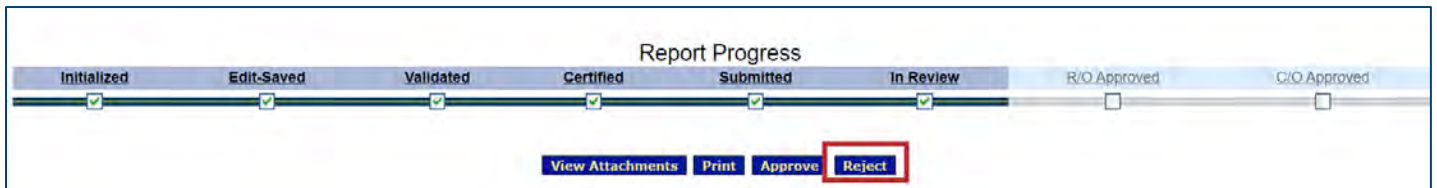
Figure 59: Report screen – Reject button

The "Report Form Status" page displays. The *Unsubmit* and *Review* buttons display. The status is *Submission Returned by CO.*

Note: Grantees with the appropriate roles can now *Unsubmit*, *UnCertify*, and edit the Report Form. When a Report Form is edited, it must be re-Validated, Certified, and Submitted to complete the process. Please be aware that if the report submission due date has passed, the Recipient will be unable to submit, and must request to have the Federal Office submit on their behalf.

Lesson 6: Revisions

OBJECTIVES

At the end of this lesson, the user will be able to:
- Initiate a Revision
- Complete and Submit a Revision

Once a Report Form is approved, the process is complete. However, if a Recipient needs to make a change, they still have the option of creating a Revision if allowed by policy. The Recipient must have the role *Revise Submitted Grant Form* to create a Revision.

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

There is no limit to the number of Revisions for a single Report Form. However, if a Revision is made after the Report Form's due date; the Recipient will not be able to submit the Revision and must instead contact the Federal Office for assistance.

To create a revision:
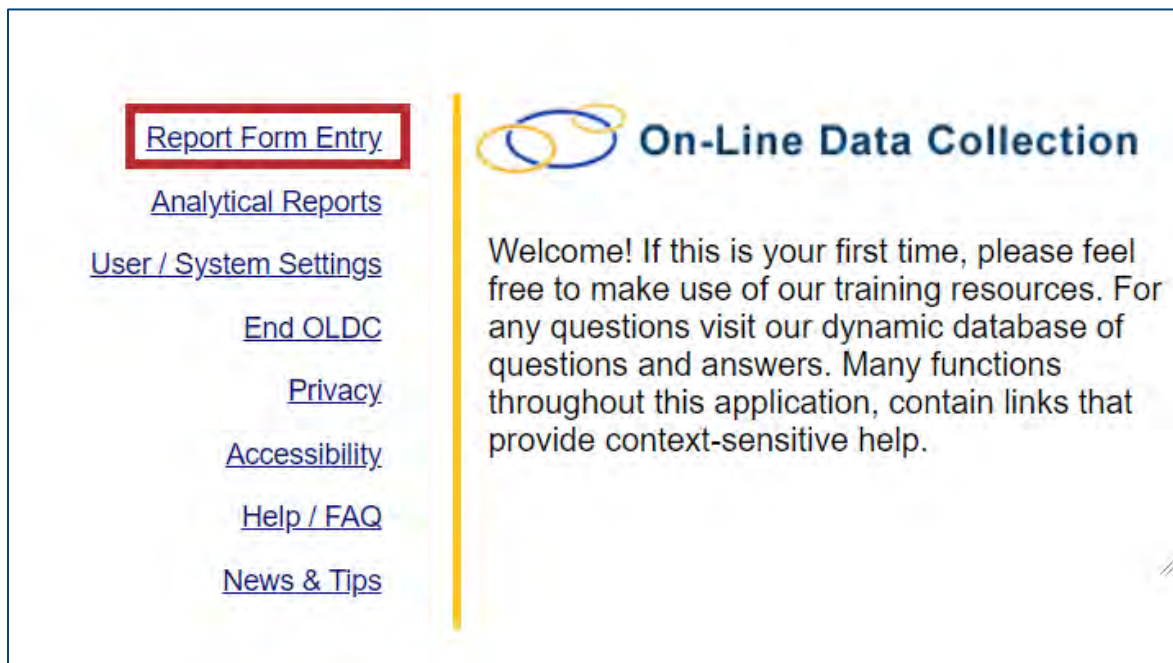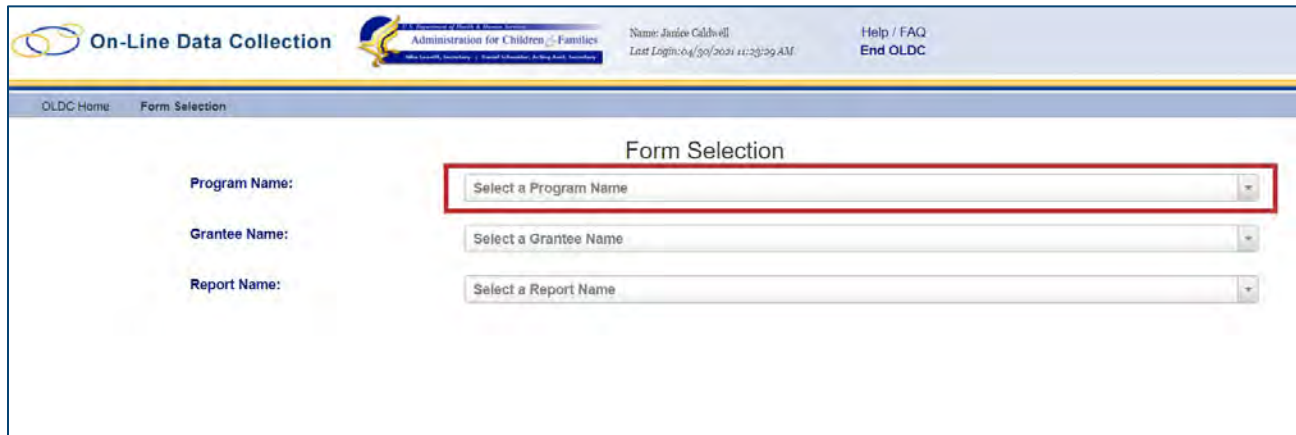1. From OLDC "Home", select the **Report Form Entry** link.

Figure 60: OLDC Home screen – Report Form Entry link

2. The "Form Selection" screen displays. Select a Program from the **Program Name** drop-down.

Note: Select the Program Name, Grantee Name, and Report Name in that order to initiate new reports, edit existing, or view reports.

Figure 61: Form Selection screen – Program Name drop-down

3. Select a Grantee from the **Grantee Name** drop-down.

Figure 62: Form Selection screen – Grantee Name drop-down

4. Select a Report from the **Report Name** drop-down.

Figure 63: Form Selection screen – Report Name drop-down

5. Once the Report Type is selected, the screen refreshes to display additional selection options. Select a Funding / Grant Period from the **Funding / Grant Period** drop-down.
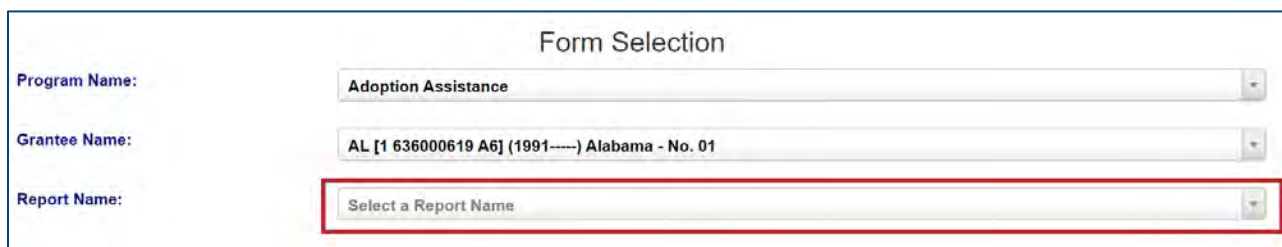

Figure 64: Form Selection screen – Funding / Grant Period drop-down

6. Once the Funding / Grant Period is selected, the screen refreshes to display the results below the search criteria. Click the **Revise** icon.

Note: The Steps required from the "Report Selection" screen may differ depending on the form selected from the previous screen. For example, some forms require a user to select a Budget Period while others only require a Reporting Period. Some forms require one step, while others require three steps.

Figure 65: Form Selection screen – Revise icon

7. The "Report" screen displays. The "Report" screen displays exactly like the original Form. However, the Report name includes Revision and the Revision number at the end of the line.

Figure 66: Report screen

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

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

Report Form Status				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
Edit Revision # 1	Submitted	05/20/2021	Unsubmit Report Review	HTML Print Form ⌄ Go
View Original	Submission Accepted by CO	02/29/2016		HTML Print Form ⌄ Go

Figure 67: Report screen

The Federal Office follows the same approval process as the original. The Form must be brought under Review, and then Approved.

Lesson 7: OLDC System Timeout and Logout

OBJECTIVES

At the end of this lesson, the user will be able to:
- Describe the Timeout process in OLDC
- Describe the Logout process in OLDC

TIMEOUT

It is important to save often. A timeout warning message displays after 30 minutes of inactivity to the OLDC server. Activity includes clicking any of the action buttons (e.g. *Save, Validate, Certify, and Submit*). Click the **OK** button from the warning message to continue working and restart the clock.

LOGOUT

After each use, click the **End OLDC** link. A report form is locked or unavailable for 30 minutes when someone working on a form exits OLDC without clicking *End OLDC*. The form is unlocked when the person that locked the form logs back into OLDC and re-opens the form.