Introduction to the Online Data Collection System

ACF TANF Grantee Training

November 16, 2021

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Housekeeping

- Greetings
- House Rules
  - Audio lines are muted
  - Ask questions in the chat. The chat is monitored, and questions will be addressed throughout the session
    - At the bottom of your screen select Chat
    - When the window opens, send your questions To Everyone
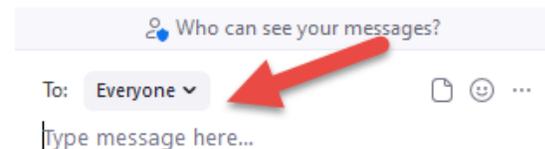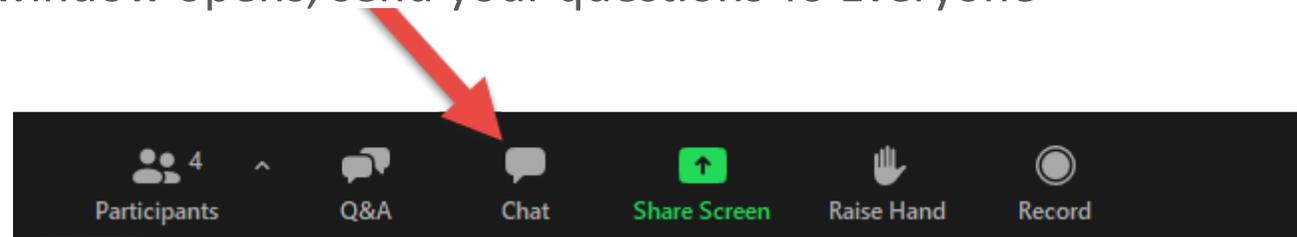
Agenda

- Introduction

- Login

- OLDC Home

- Verify Existing Permissions

- Review some of the NEW Home screens

- Access and Review Reports 424M Report and ACF-204 Form

- Report
  - o Initialize Report
  - o Save
  - o Add Attachments
  - o Validate
  - o Certify
  - o Submit

- Form and Report Revisions

- Resources

- Questions and Answers

Introduction

Introduction

- The GrantSolutions **Online Data Collection (OLDC)** system is a convenient web-based tool used to submit forms

- **Grantees** enter, validate, certify, submit, and retrieve information pertinent to the forms in OLDC

- **Grantors** electronically review, approve, or return forms for corrections

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Introduction

- OLDC is a role-based system
  - Users may only perform actions if they have the necessary permissions
- Grantees may be assigned one of the following Job Types (pre-defined group of roles):

Job Type	Description
Grant Administrator	Assigned all grantee roles.
Grant Director	Default roles are view-only and certify, which means they can view and electronically sign forms.
Authorized Official	Default roles are view-only and certify, which means they can view and electronically sign forms.
Data Entry Person	Default roles include adding file attachments, creating new forms, deleting forms, editing existing forms, and viewing and printing forms.
View Only User	Default roles are view and print forms.

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Introduction:
Account Credentials and New Requests

- GrantSolutions Management Services - New Users
  - Before gaining GrantSolutions system access, every new user is required to sign and return the GrantSolutions [Rules of Behavior](#) (Part 1)
    - The Rules of Behavior page must be signed by the requestor
  - Submit the [Recipient User Account Request Form](#) to the GrantSolutions help desk at help@grantsolutions.gov
    - The Recipient Authorizing Official must sign Part 2 of the Recipient User Account Request Form

- GrantSolutions Management Serivces - Existing Users
  - Recipients with existing access to GrantSolutions **do not** need to resubmit the Rules of Behavior or create a new account
    - Modifications - Submit the [Recipient User Account Request Form](#) (Part 2) to the GrantSolutions help desk at help@grantsolutions.gov

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Introduction: Account Credentials

- Once a user account is created, the user receives two automatically generated emails from GrantSolutions

  - The first email contains a username and a link to GrantSolutions

  - The second email contains a temporary password

Note: When accessing GrantSolutions Management Service, please use Chrome or Mozilla Firefox. Internet Explorer is no longer supported with our services.

Introduction: Workflow

- Grantees must perform specific steps to submit forms
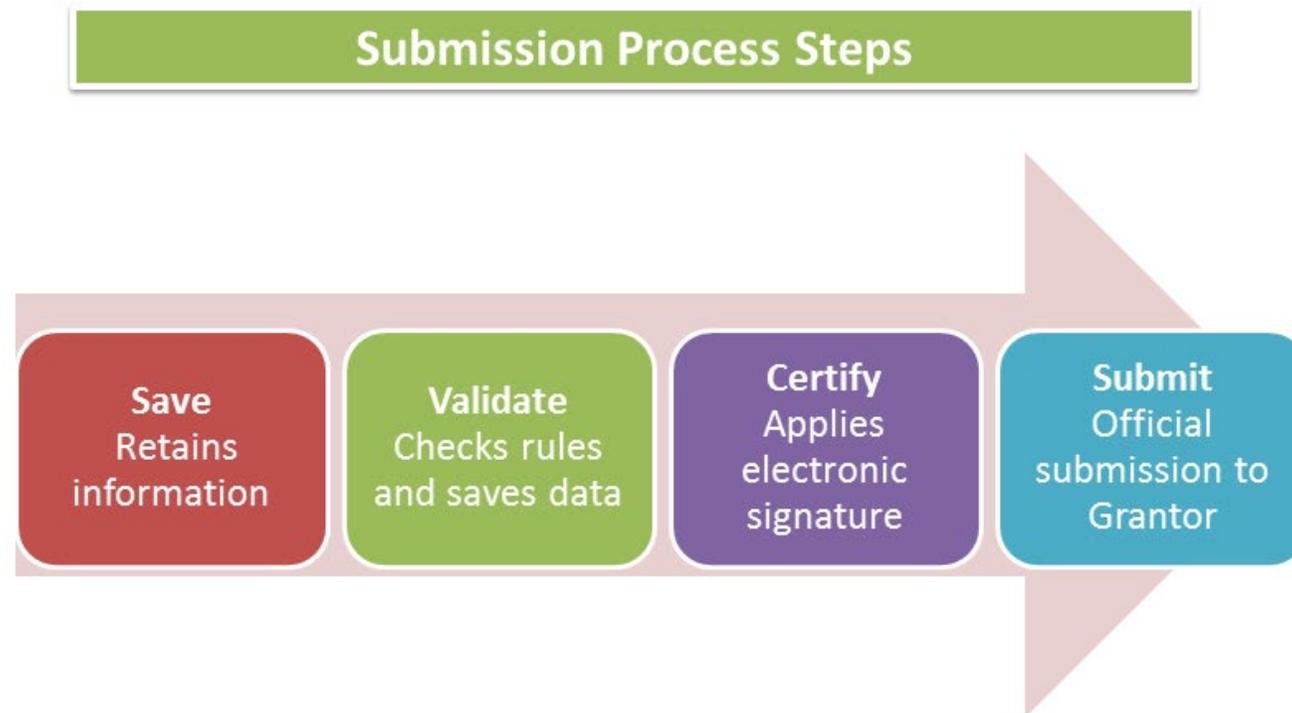
Submission Process Steps

Save	Validate	Certify	Submit
Retains information	Checks rules and saves data	Applies electronic signature	Official submission to Grantor

Note: When a form is submitted, an email notification is sent to the designated Grantee and Grantor staff.

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Login

OLDC Home

Verify Existing Permissions

Accessing Reports

Accessing Reports

- Review how to access and complete the:
  - SF 424M Report
  - ACF-204 Form

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Accessing Reports and Forms: Workflow

- Grantees must perform specific steps to submit forms
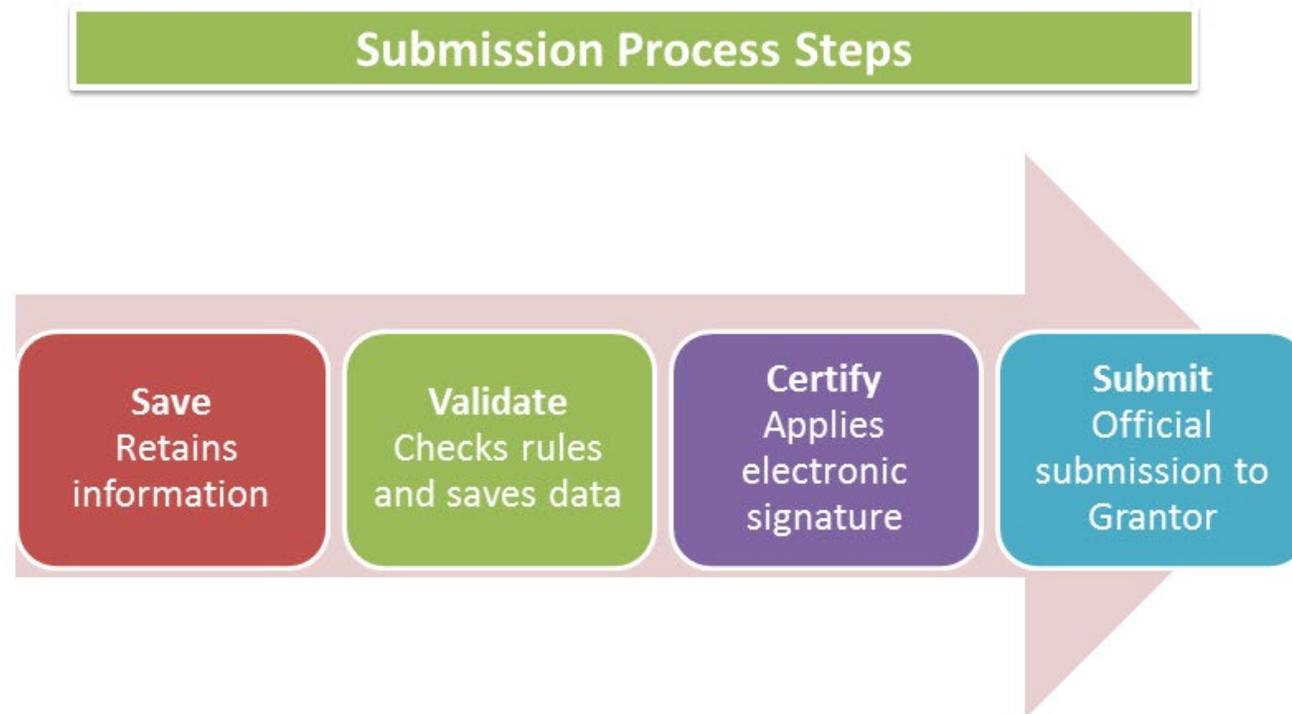
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Reports

Reports: Validate

- Once data is entered and saved, the form must be validated. Validate checks the form for mathematical errors
  - **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 appears at the top of the form. Reports with errors cannot be certified and have the status "Saved with Errors". Errors must be corrected

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Revisions

- To make a changes to a submitted form, create a **Revision**
  - A Revision is an exact duplicate of the submitted form, only the data fields are open and modifications can be made
  - The original form does not change and can be accessed by clicking **View Original** from the "Report Form Status" page
  - Once changes are made to the revised form, it must still be **validated**, **certified**, and **submitted** to complete the process
  - 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 submitted Form.

Q&A

Help and Support

Help and Support

- Help resources are available by clicking the News & Tips link from the Main Menu

- Grantee User Account Request Form – Access directly by going to: https://home.grantsolutions.gov/home/getting-started-request-a-user-account/

Resources: OLDC Documentation Site

- The "Online Data Collection Resources" site appears in a new window

Help and Support

- The GrantSolutions Help Desk team provides assistance for OLDC customers
    - **Hours of Operation:** Monday through Friday 7 a.m. to 8 p.m. ET (Closed on Federal Holidays)
    - **Email:** help@grantsolutions.gov
    - **Phone:** 866-577-0771 or 202-401-5252

Thanks for attending!