HUD Standards for Success

Using Inform: Beyond the Basics

Virtual Conference

September 27, 2017

Today's Presenter

Bridget P. Booth, MBA
Strategic Business Leader
StrategyGen

Objectives of Session

1. Review updates to Standards for Success Pilot

2. Explore features of inForm beyond primary functions

3. Provide tips to facilitate using the tool

Training regarding inForm Tool

GrantSolutions℠
PARTNERS IN INNOVATION

Participant Record-level (PRL) Report:
Grantee Actions in inForm

U.S. Department of Housing and Urban Development (HUD)

July, 2017

Background

Summary of previous virtual conference

- The inForm tool and other select tools only present data elements relevant to your Program.

- Collecting and entering data into the inForm tool or other data management systems at regular intervals during the year facilitates complete and accurate reporting of information.

- If a Participant's situation changes during the reporting period, record the most recent status of the Participant.

- The inForm tool offers multiple options for changing data in a report.

- The dates for submitting data to HUD for reporting purposes are October 1 – October 30, 2017. The report submission due date is October 30, 2017.

Report submission due date

Updates from HUD

- Budget-based Service Coordinators incorporates 202.

- References to Grantees include Service Coordinators.

- References to programs include grants and budget-based funding.

- The new data element of Participant Status Code was added.

Updates from HUD (continued)

- The response option "Information not collected" was added to any response option with "N/A".

35. Employment Type Status Code	1,2	Select	
36. Entered Employment Date	1,2	Full-time worker employed in the last month Part-time worker employed in the last month	**Collected** ☐
37. Occupation Code	1,2	Individual refused Individual does not know	
38. Monthly Paid Earnings Amount	1,2	N/A Information not collected	**Collected** ☐

Updates from HUD (continued)

- The response options "Received service through the grant" and "Received service through grant-facilitated referral" are replaced by the response option "Yes".

83. Transportation Assistance Service Code	4	Select	
85. Adult Personal Assistance Service Code	4	Yes N/A	

- If the response option "Yes" is selected, an additional response for the number of times the Participant received the service is added.

- The response options for 3 to 5 Years Childhood Education Service Code are reduced and simplified.

Updates from HUD (continued)

- The data element Hospital or Emergency Room Visit Code replaces Asthma-related Emergency Room Visit Code.

- The distinction between Temporary Housing Placement Service Code and Permanent Housing Placement Service Code is eliminated.

- Grantees and Service Coordinators will count the number of Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs) a Participant can *not* perform.

- The activity of meal preparation is under Activities of Daily Living and eliminated from Instrumental Activities of Daily Living.
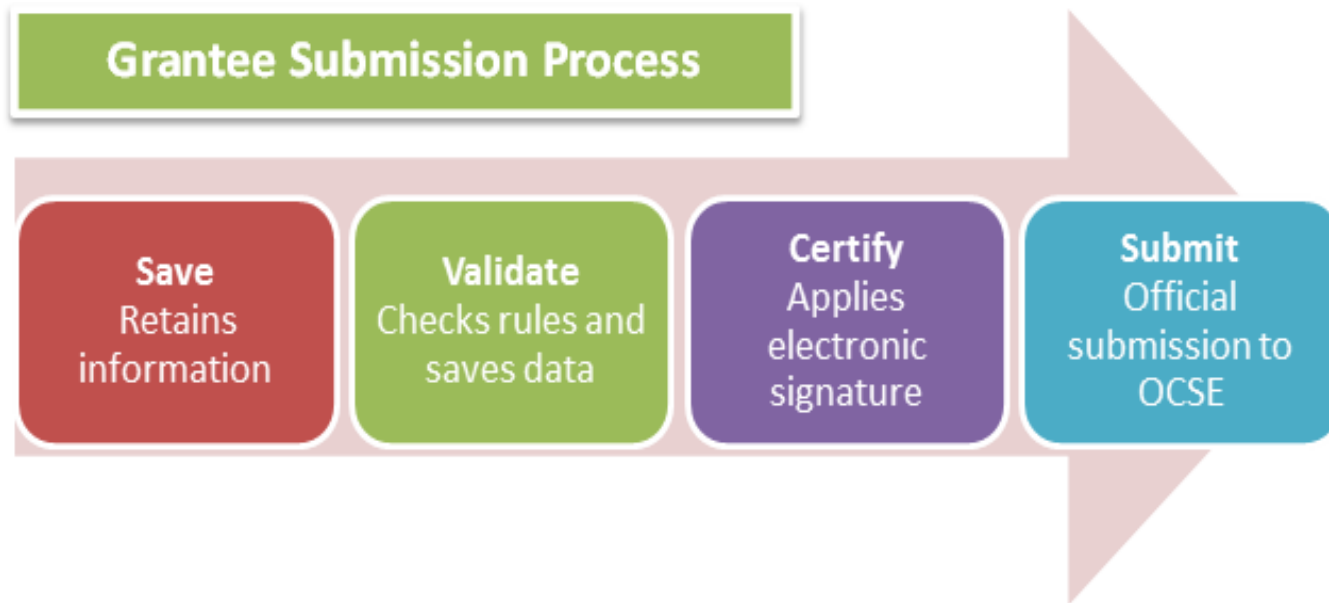
Updates from HUD (continued) – inForm Tool

inForm Tool

- In situations where HUD's updated information is not reflected in the inForm tool, follow the updated information provided by HUD.

- The Data Collection Date is the date that information regarding an individual was first collected.

- The current version of the inForm tool does not require a separate Authorized Certifying Official to complete the certify step in the tool. Follow your program guidelines regarding the individual entering and validating a report being authorized to certify and submit a report.

- Exporting customized reporting for Grantees and Service Coordinators is planned through Grant Solutions' Enterprise Reporting System (ERS) and is not currently available.

Additional Features of inForm

Grantee Submission Process

Grantee Submission Process

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

Source: Grant Solutions

DU203NP-15-D-03/049115500498

Two-Factor Authentication

- Provides an additional layer of security
- Available on the following cell phones:
  - Android
  - Apple
  - Blackberry

DU203NP-15-D-03/049115500498

Regular Home Page

On-Line Data Collection

Name: Strategy Gen2
Last Login: 09/07/2017 19:44:16 PM

OLDC Home

Switch Home Page (Enhanced)

On-Line Data Collection

Report Form Entry

Analytical Reports

User / System Settings

End OLDC

Privacy

Accessibility

Help / FAQ

News & Tips

Welcome! If this is your first time, please feel free to make use of our training resources. For any questions visit our dynamic database of questions and answers. Many functions throughout this application, contain links that provide context-sensitive help.

Enhanced Home Page

Enhanced Home Page (continued)

Enhanced Home Page (continued)

Enhanced Home Page (continued)

Enhanced Home Page (continued)

Access the Report Form Status Page (1)

Source: Grant Solutions

DU203NP-15-D-03/049115500498

Access the Report Form Status Page (2)

Source: Grant Solutions

Access the Report Form Status Page (3)

Report Form Status Page

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:**
Edit Original	Certified	08/22/2017	**Submit Report** 09/07/2017	HTML Print Form ⌄ **Go**

Report Status History

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Certified	08/22/2017 07:21:56 PM	StrategyGen User1	Signed as Authorized Official
Original	Saved -- Validated	08/22/2017 07:20:52 PM	StrategyGen User1	
Original	Saved	08/22/2017 07:20:30 PM	StrategyGen User1	
Original	Saved	08/22/2017 06:33:28 PM	StrategyGen User1	

Contacts

Contact Name:	Telephone #:	E-mail:
HUD User1	Not Available	TempEmail@gmail.com
StrategyGen User1	Not Available	TempEmail@gmail.com
HUD User2	Not Available	TempEmail@gmail.com
StrategyGen User2	Not Available	TempEmail@gmail.com
HUD User3	Not Available	TempEmail@gmail.com
StrategyGen User3	Not Available	TempEmail@gmail.com
StrategyGen User4	Not Available	TempEmail@gmail.com

Remarks History

Remark ID:	Date/Time:	User Name:	Remarks:

Report Form Status Page (continued)

Example-Certified 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 Collection'.

Report Form Status				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
Edit Original	Certified	08/22/2017	**Submit Report** 09/07/2017	HTML Print Form ∨ **Go**

Report Status History

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Certified	08/22/2017 07:21:56 PM	StrategyGen User1	Signed as Authorized Official
Original	Saved -- Validated	08/22/2017 07:20:52 PM	StrategyGen User1	
Original	Saved	08/22/2017 07:20:30 PM	StrategyGen User1	
Original	Saved	08/22/2017 06:33:28 PM	StrategyGen User1	

Contacts

Contact Name:	Telephone #:	E-mail:
HUD User1	Not Available	TempEmail@gmail.com
StrategyGen User1	Not Available	TempEmail@gmail.com
HUD User2	Not Available	TempEmail@gmail.com
StrategyGen User2	Not Available	TempEmail@gmail.com
HUD User3	Not Available	TempEmail@gmail.com
StrategyGen User3	Not Available	TempEmail@gmail.com
StrategyGen User4	Not Available	TempEmail@gmail.com

Remarks History

Remark ID:	Date/Time:	User Name:	Remarks:

Report Form Status Page (continued)

Example-Certified 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 Collection'.

Report Form Status				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
Edit Original	Certified	08/22/2017	Submit Report 09/07/2017	HTML Print Form ▾ Go

Report Status History

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Certified	08/22/2017 07:21:56 PM	StrategyGen User1	Signed as Authorized Official
Original	Saved -- Validated	08/22/2017 07:20:52 PM	StrategyGen User1	
Original	Saved	08/22/2017 07:20:30 PM	StrategyGen User1	
Original	Saved	08/22/2017 06:33:28 PM	StrategyGen User1	

Contacts

Contact Name:	Telephone #:	E-mail:
HUD User1	Not Available	TempEmail@gmail.com
StrategyGen User1	Not Available	TempEmail@gmail.com
HUD User2	Not Available	TempEmail@gmail.com
StrategyGen User2	Not Available	TempEmail@gmail.com
HUD User3	Not Available	TempEmail@gmail.com
StrategyGen User3	Not Available	TempEmail@gmail.com
StrategyGen User4	Not Available	TempEmail@gmail.com

Remarks History

Remark ID:	Date/Time:	User Name:	Remarks:

Report Form Status Page (continued)

Example-Certified Report

Report Status History

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Submission Accepted by CO	09/15/2017 01:37:21 PM	Strategy Gen4	
Original	Submission Accepted by CO	09/15/2017 01:36:54 PM	Strategy Gen4	
Original	Submission Accepted by CO	09/15/2017 01:31:24 PM	Strategy Gen4	
Original	Submission in Review by CO	09/15/2017 11:06:27 AM	Strategy Gen1	Automatically locked from changes on due date by OLDC system
Original	Submitted	07/17/2017 11:15:06 AM	StrategyGen User4	
Original	Certified	07/17/2017 10:46:58 AM	StrategyGen User4	Signed as Authorized Official
Original	Saved -- Validated	07/17/2017 10:04:51 AM	StrategyGen User4	
Original	Saved -- with Errors	07/17/2017 09:51:51 AM	StrategyGen User4	
Original	Saved	07/17/2017 09:37:29 AM	StrategyGen User4	

Contacts

Contact Name:	Telephone #:	E-mail:
HUD User1	Not Available	TempEmail@gmail.com
StrategyGen User1	Not Available	TempEmail@gmail.com
HUD User2	Not Available	TempEmail@gmail.com
StrategyGen User2	Not Available	TempEmail@gmail.com
HUD User3	Not Available	TempEmail@gmail.com
StrategyGen User3	Not Available	TempEmail@gmail.com
StrategyGen User4	Not Available	TempEmail@gmail.com

Remarks History

Remark ID:	Date/Time:	User Name:	Remarks:

Add remarks to history:

☑ Private: **Add Remarks**

Reports Form Status Page – Status Types and Definitions

Status Type (In process order)	Status Definition
Initialized	A new report form has been created but has not yet been saved.
Saved	The report form has been saved. However, the report need not be 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 cannot be submitted.
Saved -- Validated	The report form has been validated (i.e., calculations, required fields, and data accuracy are checked), and there are no errors on the saved form.
Certified	The report form has been signed by an authorizing official but has not yet been submitted to ACF.

Source: Grant Solutions – *Quick Sheet: Report Form Status Page*

DU203NP-15-D-03/049115500498
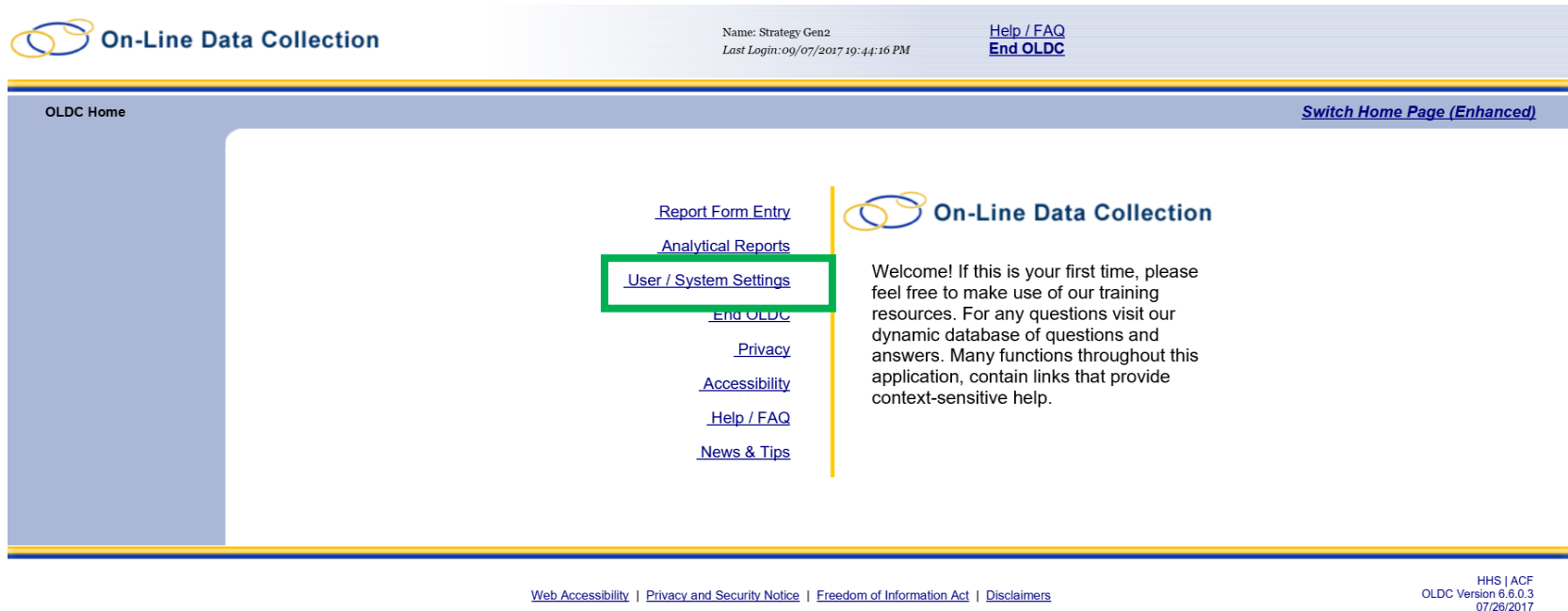
Reports Form Status Page – Status Types and Definitions (continued)

Submitted	The report form has been certified (signed) and sent to ACF.
Submission in Review by RO	Regional Office is reviewing the report.
Submission Returned by RO	Returned to grantee for changes to be made.
Submission Accepted by RO	The report form has been accepted by the Regional Office and is no longer editable by the grantee.
Submission in Review by CO	Central Office is reviewing the report.
Submission Returned by CO	Returned to either the Region or grantee for changes to be made.
Submission Accepted by CO	The report form has been accepted by Central Office and is no longer editable by the grantee.

Reports Form Status Page – Status Types and Definitions (continued)

Award Processing Complete	A separate indicator to show that the grants office has completed the award. This process is completed in the Grants Award and Transaction System and is echoed in OLDC.
Award Certified	Central Office has approved the award and sent it to accounting.
Deleted	The report form has been deleted from OLDC.

Source: Grant Solutions – *Quick Sheet: Report Form Status Page*

Changing User and Systems Settings (1)

Source: Grant Solutions

DU203NP-15-D-03/049115500498

Changing User and Systems Settings (2)

On-Line Data Collection

Name: Strategy Gen2
Last Login: 09/07/2017 19:44:16 PM

Help / FAQ
End OLDC

OLDC Home **User / System Settings**

User Settings

User Preferences personal settings - report form navigation.

View Grant Settings Review grant related dates including deadlines, due dates, and extensions.

Web Accessibility | Privacy and Security Notice | Freedom of Information Act | Disclaimers

HHS | ACF
OLDC Version 6.6.0.3
07/26/2017

Changing User and System Settings (3)

On-Line Data Collection

Name: Strategy Gen2
Last Login: 09/07/2017 19:44:16 PM

Help / FAQ
End OLDC

OLDC Home   User / System Settings   **User Preferences**

User Preferences

Optimize Screens:

This performance enhancement will change how some OLDC screens are sent to your browser.

Optimize Screens: ☐

Optimize Screens

Report Form Navigation:

Change how the TAB and ENTER keys navigate columns and rows within a grant report form.

Left to Right: ○   Top to Bottom: ○

Use Browser Default: ◉

OLDC Home Page:

Do you require Enhanced Home page?
Yes ○ No ◉

Americans with Disablities Act (Section 508) Compliance:

Do you require system enhancements for web page accessibility?
Yes ○ No ◉

Change Form Defaults   **Reset to Form Defaults**

Web Accessibility | Privacy and Security Notice | Freedom of Information Act | Disclaimers

HHS | ACF
OLDC Version 6.6.0.3
07/26/2017

Making revisions to an original report

Before submitting	After certifying	After submitting and before Grantor approval
• New/Edit/Revise Report	• Uncertify • Make edits • Save, revalidate and recertify	• Unsubmit • Make edits • Save, revalidate, recertify, and resubmit

Creating a Revision Report after Approval

Example

Reporting Period Selection

Program Name: Low Income Home Energy Assistance
Grantee Name: ALASKA
Report Name: Carryover and Reallotment Report

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

Step 1: Period Covered By This Report:

Select	Reporting Period:	Status:
○	10/01/2012 - 09/30/2013	
●	10/01/2011 - 09/30/2012	Submission Accepted by CO
○	10/01/2010 - 09/30/2011	
○	10/01/2009 - 09/30/2010	
○	10/01/2008 - 09/30/2009	

Step 2: Select Action: New / Edit / Revise Report

Enter

Grantee Selection   Report Selection

Creating a Revision Report after Approval (2)

Example

OLDC Home	Grantee Selection	Report Selection	**Report**	Report Form Status

Program Name: Low Income Home Energy Assistance
Grantee Name: ALASKA
Report Name: Carryover and Reallotment Report **Revision # 1**
Report Period: 10/01/2011 - 09/30/2012
Report Status: Initialized

Report Progress

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

Save | **View/Add Attachments** | **Validate** | **Print**

OMB Clearance No.: 0970-0106
Expiration Date: 9/30/2014

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP CARRYOVER AND REALLOTMENT REPORT

Grantee Information

Grantee: ALASKA	**Date: 06/14/2013**
For Funds Appropriated in FY:	

Instructions

This form must be submitted by August 1st. If you later find that your estimates are not accurate, submit a corrected report as soon as possible. The next fiscal year's grant award will not be issued to you until the Carryover and Reallotment Report for the current fiscal year is received by HHS.
Section 2607(b)(2)(B) of the LIHEAP statute requires that at least 90% of funds available must be obligated in the year in which they are appropriated. Not more than 10 percent of the amount payable for a fiscal year may be held for obligation in the succeeding fiscal year.

Carryover and Reallotment

1) Current year amount payable (regular block grant funds, contingency funds, and oil overcharge funds)	$2,000

Creating a Revision Report after Approval (3)

Example

Report Form Status				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
View Revision # 1	Submitted with Warnings	11/14/2012	Unsubmit Report / Review	Print as PDF ▾ Go
View Original	Submission Accepted by CO	11/14/2012		Print as PDF ▾ Go

Quick Tips

- Review the Report Sections box for accuracy

Report Sections

Program Name:	Resident Opportunity Self-Sufficiency (ROSS) Service Coordinators
Grantee Name:	City of Tucson
Report Name:	HUD-PRL Report
Funding/Grant Period:	10/01/2016 - 09/30/2017 ROSS0 (ROSS171075)
Report Period:	10/01/2016 - 09/30/2017

- View Help reference information

Quick Tips (continued)

- Use navigation bar, not the back button

- Refer to Report Progress bar

Quick Tips (continued)

- Access definitions by clicking on blue underlined text

- Save and save often

- Use End OLDC to log out

Summary

Summary

- In situations where HUD's updated information is not reflected in the inForm tool, follow the updated information provided by HUD.

- Two-factor authentication provides an additional layer of security for accessing the tool and reports.

- Changing user and system settings tailors the presentation of the screens to specific user needs.

- The Report Forms Status page, which provides detailed information regarding the history of the report, is accessed through the Form Selection page.

- In addition to options for revising an original report, Grantees and Service Coordinators can make a revision of an approved report.

Contact Information for the inForm Tool

For:
- **Requests for new inForm accounts**
- **"How-to" questions regarding steps to use the tool**
- **Standards for Success general questions and feedback**

🖥 **AskGMO@hud.gov**

For:
- **Requests for reminders of usernames**
- **Password resets**
- **Questions regarding inForm's technology**

🖥 **help@grantsolutions.gov**

📱 **202-401-5282 or 1-866-577-0771**

Summary of Reference Materials

Data Integrity Reference Manuals

Shortcuts

Quick References

Frequently Asked Questions

Fact Sheets

Participant Record-level Information

Virtual Conferences

Computer-based Training

HUD Exchange Website:
https://www.hudexchange.info/programs/standards-for-success/

HUD Standards for Success Virtual Conference 9 – Using inForm: Beyond the Basics– Speaker's Comments

Page 1: Cover Page

- Welcome to HUD's Standards for Success Pilot's Virtual Conference addressing Using inForm: Beyond the Basics.
- If you have participated in and are participating in a scheduled virtual conference, you know the drill about technology reminders:

  1. Make sure your computer's speakers are not muted. Audio is through your computer, not the telephone conference call number.
  2. At the top of your screen, there is a gray options bar. By clicking on the box of arrows on the right side, you can increase the size of the screen.
  3. You can download this presentation via the link in the lower left corner of your screen.
  4. If you have any questions, please submit them throughout the session using the Q&A box on the lower right corner of your screen. It is helpful to include the name of your HUD Program with the question as clarifying information.

Page 2: Today's Presenter

- My name is Bridget Booth and I am the Strategic Business Leader of StrategyGen. StrategyGen is contracting with the Department of Housing and Urban Development (HUD) to facilitate the HUD Standards for Success framework.
- We are working with Thaddeus Wincek who is with HUD's Office of Strategic Planning and Management.
- You can find all previous virtual conferences can be found on the HUD Exchange website.

Page 3: Objectives of Session

- The objectives for this session are to:
    - Review updates to Standards for Success Pilot
    - Explore features of inForm beyond primary functions
    - Provide tips to facilitate using the tool
- If you use AASC Online or FamilyMetrics, you may be wondering, do I need to enter the information into inForm?
- The answer is no. AASC Online and FamilyMetrics will submit their data to HUD on their behalf. Individuals who use AASC Online or FamilyMetrics do not need to use or enter data into inForm.

- This virtual conference focuses on the inForm tool. Users of AASC Online and FamilyMetrics do not need to view this training as they are not directly inputting information into inForm.
- As a reminder, if you have questions regarding AASC Online and FamilyMetrics, contact support@pangeafoundation.org

Page 4: Training regarding inForm Tool

- HUD worked with GrantSolutions to provide you with the inForm tool. inForm, also known as Online Data Collection (OLDC) and Reporting tool, is a web-based tool used to submit your data.
- GrantSolutions provided a user training that introduces you to the tool and provides instruction on the steps to use the tool. Their recorded virtual conference was e-mailed to you and is available on the HUD Exchange website. It is a precursor to the material presented in today's discussion.
- Today's virtual conference is _not_ intended to be an introductory overview of the inForm tool. Our discussion today supplements and builds on the information provided in GrantSolutions' initial training regarding the tool.

Page 5: Background

- I will take a few moments to provide background information in anticipation of our discussion regarding the additional features of the inForm tool. I will discuss key points from the previous virtual conference and review updates related to Standards for Success from HUD.

Page 6: Summary of Previous Virtual Conference

- Our last virtual conference, Putting It Together: Collecting and Reporting Data Using inForm discussed the activities to collect, enter and report data using the inForm tool all together. The virtual conference included the following key points.

- The inForm tool and other select tools only present data elements relevant to your Program. You are not required to collect and enter all 99 data elements. You are only asked to collect and enter data elements identified as relevant to your Program by your Program Office.

- Collecting and entering data into the inForm tool or other data management systems at regular intervals during the year facilitates complete and accurate reporting of information. I strongly encourage you to avoid waiting until the end of October approaches to enter data. It is too much information to enter at the very end!

- You do a tremendous amount of good work throughout the year. Go ahead and enter it to help ensure you capture your many activities related to Participants. Delaying

increases the potential of inadvertently not entering some of your work. Enter your data now!

- If a Participant's situation changes during the reporting period, record the most recent status of the Participant.

- The inForm tool offers multiple options for changing data in a report before the Grantor locks down the report.

- In 2017, you will submit data to HUD for reporting purposes beginning October 1 through October 30. The report submission due date is October 30, 2017.

Page 7: Report submission due date

- Here you have it-your reminder: The data and information you collect and enter is due to HUD for reporting purposes on October 30, 2017.

Page 8: Updates from HUD

- I want to take a moment to summarize some key updates from HUD regarding the Pilot. This is information from HUD regarding refinements to the framework that have occurred since the start of the Pilot.
- This information may not be reflected in the inForm tool. Use this updated information to guide your entries in the inForm tool.
- Budget-based Service Coordinators incorporates 202.
- 202 is now included with Budget-based Service Coordinators. You no longer see references to 202.
- As a reminder, B-b Service Coordinators collect and report the same data elements as Multi-Family Service Coordinators (MFSC).
- References to Grantees include Service Coordinators.
- References to programs include grants and budget-based funding.
- The new data element of Participant Status Code was added. This enables identification of individuals who reside in your program but are not actively participating in offered services.

Page 9: Updates from HUD (continued)

- The response option "Information not collected" was added to any response option with "N/A". This is appropriate to use when the Grantee or Service Coordinator does not receive information about a data element from a Participant.
- The graphic on your screen identifies this new response option in the example on this slide.

Page 10: Updates from HUD (continued)

- The response options "Received service through the grant" and "Received service through grant-facilitated referral" are replaced by the response option "Yes".

- Most of the service code data elements – 34 data elements – have the new response options of:
  - Yes
  - N/A
- Examples of the service code data elements include:
  - Transportation Assistance Service Code; and
  - Medical Care Service Code
- If you select the response option of "Yes" indicating the Participant received a service, an additional response for the number of times the Participant received the service is added. Enter the number of times the Participant received the service as a whole number.
- The response options for 3 to 5 Years Childhood Education Service Code are reduced and simplified.

Page 11: Updates from HUD (continued)

- The data element Hospital or Emergency Room Visit Code replaces Asthma-related Emergency Room Visit Code.
- We have had a few questions regarding Temporary Housing and Permanent Housing Placement Code, specifically the definitions of temporary versus permanent.
- The distinction between Temporary Housing Placement Service Code and Permanent Housing Placement Service Code is now eliminated.
- It can be difficult at the time of placement to know if the placement is temporary or becomes permanent.
- Another change: Grantees and Service Coordinators will count the number of Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs) a Participant cann*ot* perform. Previously, this data element counted the number of activities a Participant can perform.
- The activity of meal preparation is under Activities of Daily Living and eliminated from Instrumental Activities of Daily Living.
- This eliminates a duplicated activity listed under both ADLs and IADLs.

Page 12: Updates from HUD (continued) – inForm Tool

- Once again, in situations where HUD's updated information is not reflected in the inForm tool, follow the updated information provided by HUD.
- The Data Collection Date is the date that information regarding an individual was first collected.
- The current version of the inForm tool does not require a separate Authorized Certifying Official to complete the certify step in the tool. Follow your program guidelines regarding the individual entering and validating a report being authorized to certify and submit a report.

- Customized reporting for Grantees and Service Coordinators is not yet available. It is planned through Grant Solutions' Enterprise Reporting System (ERS).

Page 13: Additional Features of inForm

- Now let's move on to the topic of today's virtual conference, Using inForm: Beyond the Basics. I will discuss features of or topics related to inForm that go beyond or supplement the basic features of Save, Validate, Certify and Submit.

Page 14: Grantee Submission Process

- You probably recall from the GrantSolutions' video conference introducing the Online Data Collection and Reporting tool that the four steps for submitting a report are:
    - Save,
    - Validate,
    - Certify, and
    - Submit.
- The save step retains information that you have collected. Validate involves checking rules and identifies any missing information or other errors. The certify step includes signing the report electronically. Finally, submit involves presenting the report to HUD.

Page 15: Two-Factor Authentication

- Now, let's start the discussion of additional features of the inForm tool.
- The first one we will discuss is two-factor authentication.
- So, what is two-factor Authentication?
    - Two-factor authentication adds an additional layer of security when logging in to a system, such as, GrantSolutions' system. This extra layer of security helps protect personal and organizational information. It also helps confirm the identification of users logging into GrantSolutions.
    - After enabling two-factor authentication, when you log in with your username and password, you will be prompted to enter a passcode. The passcode may be provided to you in several different ways: using Google authenticator on your smart phone, a voice call-back message, or a text message.
    - If you select two-factor authentication, you will have a special code every time you log-in.
    - So, you may not want to turn on this feature until after you are comfortable logging into the tool.
- If you elect to use two-factor authentication, make sure the information (particularly your telephone number) in your Profile is updated to enable this feature. You access your Profile through the landing page after you log into GrantSolutions. It is found at the top right corner under your log-in username. Use the drop-down area next to your log-in username and select Update Profile.

- There are detailed instructions for setting up two-factor authentication for the various types of smartphones (Android, Apple or Blackberry) on GrantSolutions' web site. You can access set up instructions for the Apple, Android, and Blackberry devices through GrantSolutions Help/ FAQs link on your home screen in inForm.

Page 16: Regular Home Page

- Another feature of the inForm tool is your choice of a Regular Home Page or Enhanced Home Page.
- Represented on this slide is the Regular Home Page. The Regular Home Page provides the basic menu.
- The links on this page include:
  - Report Form Entry;
  - Analytical Reports;
  - User / System Settings;
  - End OLDC;
  - Privacy;
  - Accessibility;
  - Help / FAQ; and
  - News and Tips.
- Each of these options will allow you to access various sections of inForm.
- As we have discussed before, the first link, Report Form Entry is the first step in creating, editing, and submitting reports.
- To exit inForm, you may choose the End OLDC option from this home page.
- Some of these links provide information regarding privacy and submitting information electronically while maintaining privacy standards. Others are dedicated to helping you with frequently asked questions.

Page 17: Enhanced Home Page

- Now let's look at the Enhanced Home Page. Take a look at the left-hand side of the screen on this slide. Does this look familiar? The Enhanced Home Page has the same links that are accessible in the Regular Home Page.
- The Enhanced Home Page also contains three additional tabs: My Recent Activity, Approval Activity, and Grantee Activity. These tabs are easily identified to the right of the menu options we just discussed.
- The My Recent Activity tab shown in the green box will contain rows for every report you have worked on. So, if you have begun to work on something and you want to come back later, if you just go to My Recent Activity the report will be accessible here.

Page 18: Enhanced Home Page (continued)

- The next tab we have is Approval Activity. You can use Approval Activity to search for your reports that are in progress or reports that have been submitted.
- To access this tab, click on Approval Activity. You will then go through the steps on this screen. First, locate your program from the drop-down menu. Next, select the Report Type. Finally, select an option (i.e., Report Due Date or Fiscal Year) from the Search Option box. The Grantee box is optional. The Grantee box drop down menu lists the names of the Grantees.
- After clicking enter, you are provided information identifying the report, its due date, status and actions. Actions include viewing the report and taking you to the Report Form Status page. More on this later.

Page 19: Enhanced Home Page (continued)

- I'm going to go to our next tab, which is Grantee Activity. In the Grantee Activity tab, you can find reports that are due, past due, being worked on or submitted.

Page 20: Enhanced Home Page (continued)

- Take a look at the Search Options drop down menu on the right of your screen in the green highlighted box.
- This drop-down menu allows you to choose from the following options:
  - Report Due Date;
  - Period End Date;
  - Fiscal Year; and
  - Calendar Year.
- This option is used in both the Approval Activity tab and the Grantee Activity tab.
- It simply serves as a resource to easily locate the report you will be working on and monitoring its progress.

Page 21: Enhanced Home Page (continued)

- Take a moment to look at the information provided after clicking Enter.
- Again, this information is provided from both the Approval Activity tab and the Grantee Activity tab
- The grey and blue table includes identifying information regarding the Grantee, Grant, Report, Reporting Period, Due Date, Report Status and Actions. See the column headings for a desired type of information.
- You can use the column heading to sort a column in ascending or descending order by clicking the column header. This may be helpful if there are multiple reports listed.
- The Search box, located above the column headings can be used to search within the results table. Search any field in the table by using text or numbers.

- As you see from the Status column, this report has been submitted. Take a look at the Actions. For this submitted report, you can view the report or navigate to the Report Form Status Page. I'll discuss the Report Form Status page in more detail later.
- If a report has not been started, the report will not have a report status. If you go to the Action column for reports that have not been started, you can create the report from this tab by clicking Create in the drop-down menu.
- This information in this table allows you to easily identify a report that needs completion from multiple available search options.

Page 22: Access the Report Form Status Page (1)

- I'd like to revisit the topic and feature of the Report Form Status page. The page offers a wealth of information regarding reports. There are several ways to access the Report Form Status page.
- One way to access the Report Form Status page is through the Enhanced Home Page that I just discussed. On the Enhanced Home Page, the second and third tabs, Approval Activity and Grantee Activity respectively, provide options for accessing the Report Form Status page for the identified submitted report. Under the Actions column, there is a drop-down menu option for Report Status. This takes you to Report Form Status page.

Page 23: Access the Report Form Status Page (2)

- Next, I will discuss another way to access the Report Form Status page.
- You can use Report Form Entry from the OLDC Home Page to get to the Report Form Status page. This slide show the first step, the Report Form Entry link on the Regular Home Page. Click Report Form Entry to go to the Form Selection screen.

Page 24: Access the Report Form Status Page (3)

- On the Form Selection screen, after you select the Program Name, Grantee Name, Report Name, Funding/Grant Period, and Report Period, you Select Action. Use the drop-down menu to select View / Print / Status / Approve Report as shown by the green box. Click Enter.
- This will take you to the Report Form Status page.
- Before I discuss the content of the Reports Form Status Page, I will mention there is another way to see this page. An additional time when you see the Report Form Status page is after submitting a report for approval (after clicking the Submit button), inForm will move you to the Report Form Status page.

Page 25: Report Form Status Page

- On this slide, you can see the Report Form Status page in full. This feature of the OLDC tool is helps you monitor the status of your report.
- This Report Form Status page is an example of a report completed through the Certify step.

- The first topic I will discuss is the information located under the grey Report Form Status bar at the top of the page. It is highlighted in a green box.
- Looking left to right across the top of the table:
  - With this certified report, you have the option to edit the report. You see the next two columns show the Report Status of Certified on the Status Date of August 22, 2017.
  - Under the Report Action column, you can submit the report. This is indicated by the button with yellow font and dark blue background. The date box is auto-populated on the day that you access the Report Form Status page. In our example, this report was accessed on September 7th, 2017.
  - If the report had been submitted, the Report Action column provides options to Unsubmit Report or Review the report.
  - In the final column on the right, you can print the report as an HTML file or PDF file. If there are attachments, it also includes an option to print as a PDF file with attachments.
  - Select the type of file you would like to print from the dropdown menu. Click Go.

Page 26: Report Form Status Page (continued)

- Report Status History is identified by the green box in this slide. It provides detailed information regarding the history of the steps to complete the report.
- For example, the top row under the column headings indicates the last activity for this example report. Once again, looking left to right across the table:
  - Column two, Report Action, shows this report has been certified. The Date/Time shows August 22, 2017, meaning it was certified on that day. The time the report was certified is even provided! In addition, the User Name of the individual completing the step is included.
- Going back to column two, the Report Action column, you can see each time the report was saved, and when it was validated. This is handy when checking on the status of your report to determine when you made changes.

Page 27: Report Form Status Page (continued)

- Next is the Contacts section.
- This section provides contact information for users that have worked on the report. This shows:
  - Contact name;
  - Telephone number; and
  - E-mail address of the contact.
- This is why it is important when updating your profile to provide valid contact information.

- More than one individual can work on a report at the same time *if* they are working in different sections of the report.

Page 28: Report Form Status Page (continued)

- Finally, we have the Remarks History section of the Report Form Status page.
- This is identified by the green box on this screen.
- The remarks history provides you with information regarding any comment made about the report. Examples include the date and time of the remark, user name, and full remark of any occasion where remarks have been made on your report.
- Beneath the Remarks History table is the feature to Add a Remark. To add a remark, type the remark into the blue box under the phrase Add remarks to history. You have an option to make the remark private by clicking the box adjacent to the word Private. Click the dark blue Add Remarks button to insert the remark.

Page 29: Reports Form Status Page – Status Types and Definitions

- Are you interested in definitions of terms of the various types of Status of a report used in the Report Form Status page? The next three slides include definitions. I am not going to discuss each term. They are included for your reference.

Page 30: Reports Form Status Page – Status Types and Definitions (continued)

- You can also find this information in a reference document titled: Quick Sheet - Report Form Status page prepared by GrantSolutions.
- The name of the Quick Sheet is located in the lower left of the slide.

Page 31: Reports Form Status Page – Status Types and Definitions (continued)

- This and other Quick Sheets prepared by GrantSolutions can be found on the OLDC home page under the link Help/FAQs and News/Tips.

Page 32: Changing User and System Settings (1)

- Now let's talk about features associated with User and System Settings.
- I do not encourage you to change the User and System settings unless you have a real need to do so. I will review the steps to change the settings in the event you have a valid need.
- This slide may look familiar to you. I have referenced the OLDC Home Page a few times in this discussion.
- To change User and System settings in your OLDC profile: On your OLDC home screen, click User / System Settings as shown in the green box.

Page 33: Changing User and System Settings (2)

- This will lead you to the User / System Settings page.

- To change your settings, click the User Preferences. This will allow you to access personal settings and report form navigation options.

Page 34: Changing User and System Settings (3)

- As shown in the green box, you have the options to customize various settings in the tool.
- The first option, Optimize Screen, will affect screens such as the Forms (or Grantee) Selection Screen. The selection process will be enhanced for those of you who have many assignments.
- There are multiple other options within the user settings.
- For instance, for Report Form Navigation, you can change how the Tab and Enter keys move from cell to cell. If you choose Left to Right, using the Tab and Enter keys will move from cell to cell starting from the left and continuing across the row.
- Top to Bottom moves from cell to cell starting from the top and continuing down the column.
- The Use Browser Default button uses the navigation as defaulted by your specific browser. This type of navigation is suggested for anyone needing special key combinations necessary for Section 508 of the Americans with Disabilities Act (ADA) including screen readers.
- User preferences also includes the option to select system enhancements for web page accessibility associated with Section 508.
- The buttons at the bottom of the screen Change Form Defaults or Reset to Form Defaults. If you made selections you would like to retain, click the dark blue Change Form Defaults button.

Page 35: Making revisions to an original report

- You probably recall from our last virtual conferences that there are several ways to edit an original report.

- There are opportunities at each stage to modify the information in your report before the Grantor locks down the report.
    1. The first option before submitting the report is to enter the report using the New/Revise/Edit option from the Action box that was discussed when initiating a report. You can edit entries by selecting the response options and selecting a revised response option.
    2. The next option for modifying information is Uncertify. After certifying your report, you can use the option of Uncertify. This will allow you to modify the information you previously entered in the report. After completing your changes, simply save, revalidate and recertify the report again.
    3. The third option: If you have already submitted the report, but the Grantor has not locked down the report and you need to make changes, click the Unsubmit

Report button. This enables you to revise the report. Once your revisions are made and saved, you must revalidate, recertify and resubmit the report.

- At all of these stages, you have the option to edit the information. Remember to save the report after making the appropriate changes!

Page 36: Creating a Revision Report after Approval

- The inForm tool also offers the capability to revise a report that has been submitted and approved. It allows you to create a revision report from the original report that was approved.
- To create a revision, click Report Form Entry from the OLDC Home page.
- The Program & Grantee Selection screen displays. Select a Program, Grantee, and Report Name (in that order), and then click Enter.
- The Grant & Report Period Selection screen displays. Choose a Funding/Grant Period, Report Period, select the Action of New/Edit/Revise Report, and then click Enter as shown in the green boxes on your screen.

Page 37: Creating a Revision Report after Approval (2)

- The Report screen displays. The Report screen appears exactly like the original Form or report. However, the Report name includes Revision and the Revision number at the end of the line as shown in the green box.
- The submission of a Revision follows the exact same process as the submission of the original Report Form: Save, Validate, Certify, and Submit.

Page 38: Creating a Revision Report after Approval (3)

- 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 Form.

Page 39: Quick Tips

- Review the Report Sections box for accuracy
  - The light blue box centered at the top of the screen summarizes the selections made in Forms Selection. Always review this information before you continue. If something is wrong, click the link next to the step and correct it.
- View Help reference information
  - The Help button is shown as a blue question mark in a circle in the upper right of several screens.
  - This allows you to access help resources if you have any questions regarding your current actions within the tool.

Page 40: Quick Tips (continued)

- Use the navigation bar, not the back button.
  - By doing so, you will have a more seamless encounter with the inForm tool. The tool was created to move through screens by using the navigation bar rather than the back button in your browser.
  - The back button does not always work as expected.
- Refer to the Report Progress bar to determine which portion of the report you are currently working on. This helps to stay on track and monitor what current actions you are taking. This will also provide assistance for when you save your report and come back at another time to finish. You can check the report progress bar for a refresher of which stage you are at in the submission process.

Page 41: Quick Tips (continued)

- Access definitions by clicking on blue underlined text
  - Text that is in dark blue underlined font can be clicked by using your mouse on a term. When you perform this action, a definition will pop-up proving more information regarding the term. This is useful if you would like additional information regarding a term.
- Save and save often
  - Please, I cannot reiterate enough, save and save often. You do not want to lose data that you have worked so hard to collect and enter.
- Use End OLDC to terminate a session.
  - It is found in the upper right of your screen in dark blue font.

Page 42: Summary

- I'll summarize key points from today's discussion.

Page 43: Summary

- In situations where HUD's updated information is not reflected in the inForm tool, follow the updated information provided by HUD.
- Two-factor authentication provides an additional layer of security for accessing the tool and reports.
- Changing user and system settings tailors the presentation of the screens to specific user needs.
- The Report Forms Status page, which provides detailed information regarding the history of the report, is accessed through the Form Selection page.
- In addition to options for revising an original report, Grantees and Service Coordinators can make a revision of an approved report.

Page 44: Contact Information for the inForm Tool

Important question: I need help with the inForm tool. Who can I contact?

- For assistance with the inForm tool, the type of question or request you have determines who you contact.
- For:
  - Requests for new inForm accounts; and
  - Questions regarding "how-to", or steps to use the tool contact:
    - AskGMO@hud.gov
- You probably recognize this is the same e-mail address you use for general questions or feedback regarding Standards for Success.
- For requests for reminders of usernames, resetting passwords and questions regarding inForm's technology, please contact:
  - [help@grantsolutions.gov.](mailto:help@grantsolutions.gov)
  - You can also contact GrantSolutions by phone at:
    - 202-401-5282; or
    - 1-866-577-0771.
- For program-specific questions, speak to your HUD Program contact person.

Page 45: Summary of Reference Materials

- I want to remind you that HUD has provided reference materials that will help you with your data collection and reporting activities.
- Regarding Data Integrity and Collection, you have the reference materials listed on this slide.
- Data reporting reference materials will include similar materials.
- The HUD Exchange website houses the most recent versions of reference materials. The website address is provided.
- For those of you participating in a group virtual conference on Adobe Connect, I will now answer questions submitted through the Q&A dialogue box on Adobe Connect. Please submit all questions through the Q&A dialogue box at the lower right of your screen.