



On-Line Data Collection

HUD User Guide

October 2020

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Overview

The Department of Housing and Urban Development (HUD) utilizes the On-Line Data Collection (OLDC) module to collect and process reports pertaining to business needs. OLDC is an online repository of forms and attachments that stores data from recipient users in reports. Completed reports are sent to grantor users for approval and are based on Program Name, Grantee Name, Report Name, and Funding/Grant Period. To gain access to OLDC, users must submit an OLDC Request Form to the GrantSolutions Help Desk. Submit request forms by email to help@grantsolutions.gov.

To process a report for HUD approval, a recipient user with authority to edit a report must first initiate a report. This process includes creation of the report and the addition of any report sections that must be included. The recipient user must then edit the report sections with specific information that is required. After verifying information and correcting any errors, the recipient then must validate the report to move it forward. A recipient user with authority to certify and submit a report must then certify the report and submit the report upon certification.

A member of the HUD team with authority to approve the report must then approve the report or return the report. If a member of the HUD team determines that corrections or additions to the submitted report is required, feedback and the submission is returned from HUD for the recipient to resolve.

The following figure represents the approval workflow HUD utilizes to validate, submit, and approve reports:

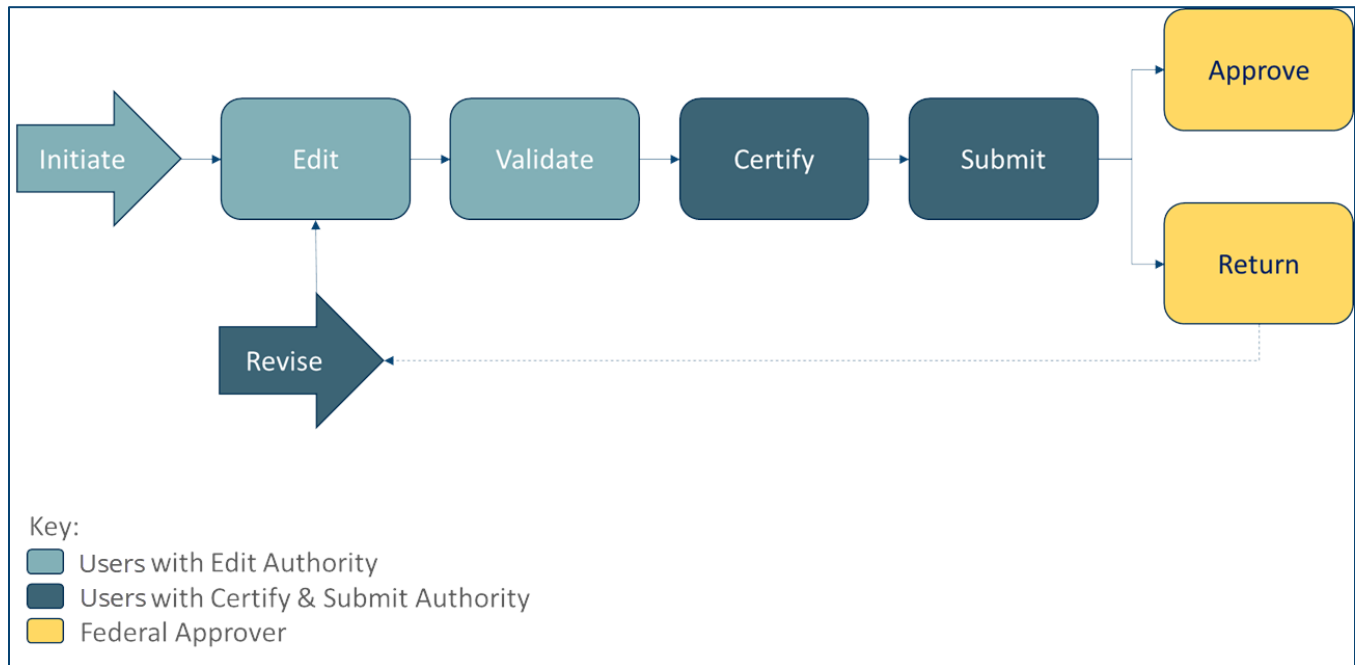








Figure 1: Approval workflow

The focus of this user guide is to help recipient users understand how to access, complete, and submit a report form. The form is located in GrantSolutions.

Navigation






FORM SELECTION ICONS



The following icons appear on the “Form Selection” screen of the OLDC module for a report depending on the user role and workflow progress:

Icon	Name	Description
	Create	Initialize the report for the first time. The user enters edit mode.
	Edit	Open the report in edit mode.
	Report Status	Workflow history for the report. Access previous versions of a revised report here.
	Print Latest Version (HTML)	Create a printable copy of the report.
	View Latest Report	Open the report in read-only mode.
	Revise	Create a new copy of a previously accepted or returned report.

REPORT ICONS AND BUTTONS

The following icons and buttons appear on a report depending on the user role and workflow progress:

Icon	Name	Description
	Print Latest Version (HTML)	Create a printable copy of the report.
	Previous Section	Navigate to the previous section of the report.
	Save	Save the section or sub-section currently open.
	Validate	Validate the section or sub-section currently open.
	Next Section	Move to the next section of the report.

Icon	Name	Description
Add Projects: 1 ▾ Add	Add Row	Add a row to the table.
Delete Marked Rows	Delete Marked Rows	Delete rows from the table marked with a checkmark in the <i>Delete</i> column.
	Edit Sub-Section Record	Open a sub-section record in edit mode.
	Delete Sub-Section Record	Delete a sub-section record from the table.
Previous 1 Next	Previous/Next buttons	Tabs appear if there are more sub-section records than can fit in the table. Use these buttons to navigate through tabs.
Add Sub-Recipient	Add Sub-Section Record	Open a new sub-section record for data entry. The new record is added to the table that lists sub-section records.
Go to Main	Go to Main	Return to the table that lists sub-section records.

SHORTCUTS

Use the **Report Sections** drop-down in the menu bar to navigate directly to a particular section.

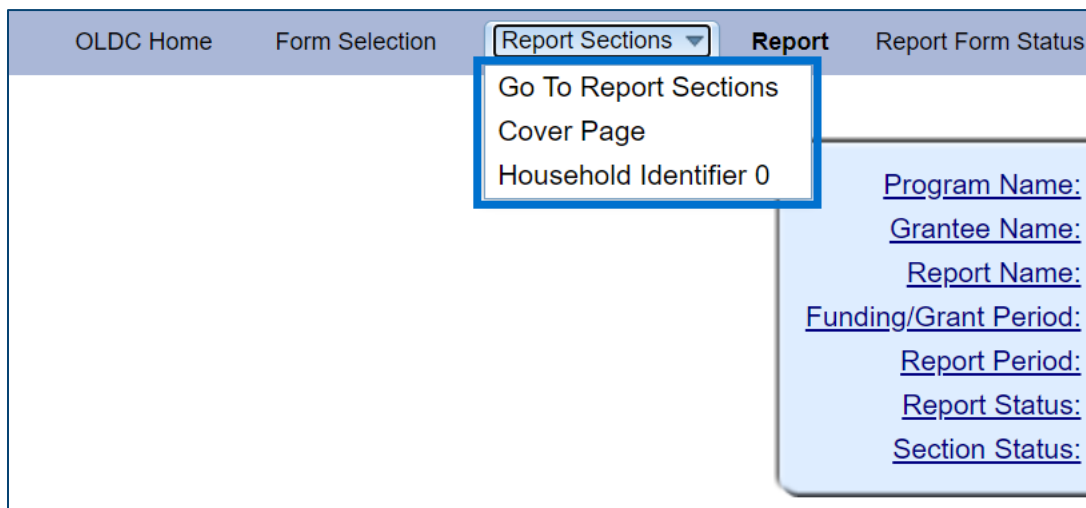


Figure 2: Report Sections drop-down

REPORT PROGRESS BAR

As a report progresses through the workflow, the *Report Progress Bar* at the top of the screen changes status.

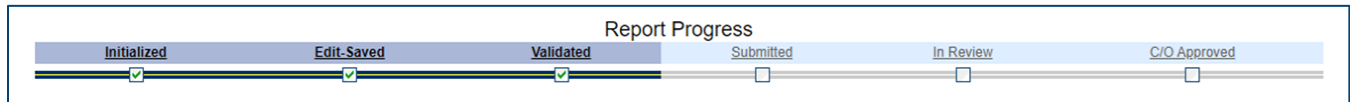


Figure 3: Report Progress Bar

Login

Users with access to OLDC can log into GrantSolutions and access available reports by performing the following:

1. Navigate to www.grantsolutions.gov.
2. Click the **Login** button in the top right corner.

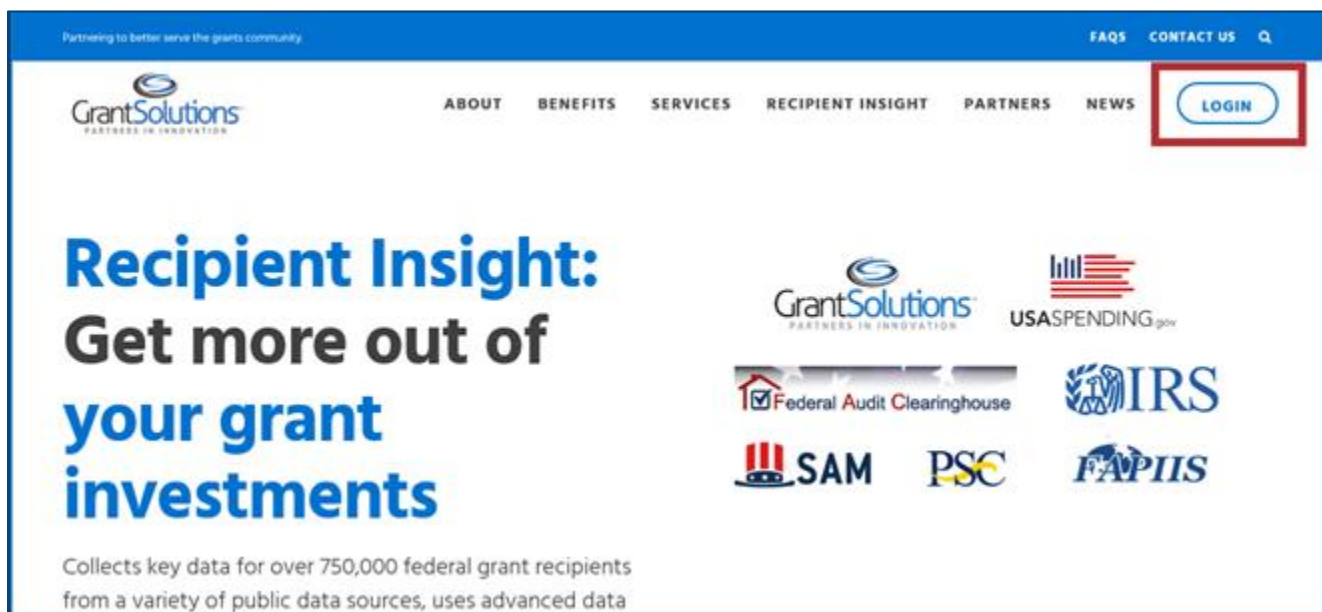
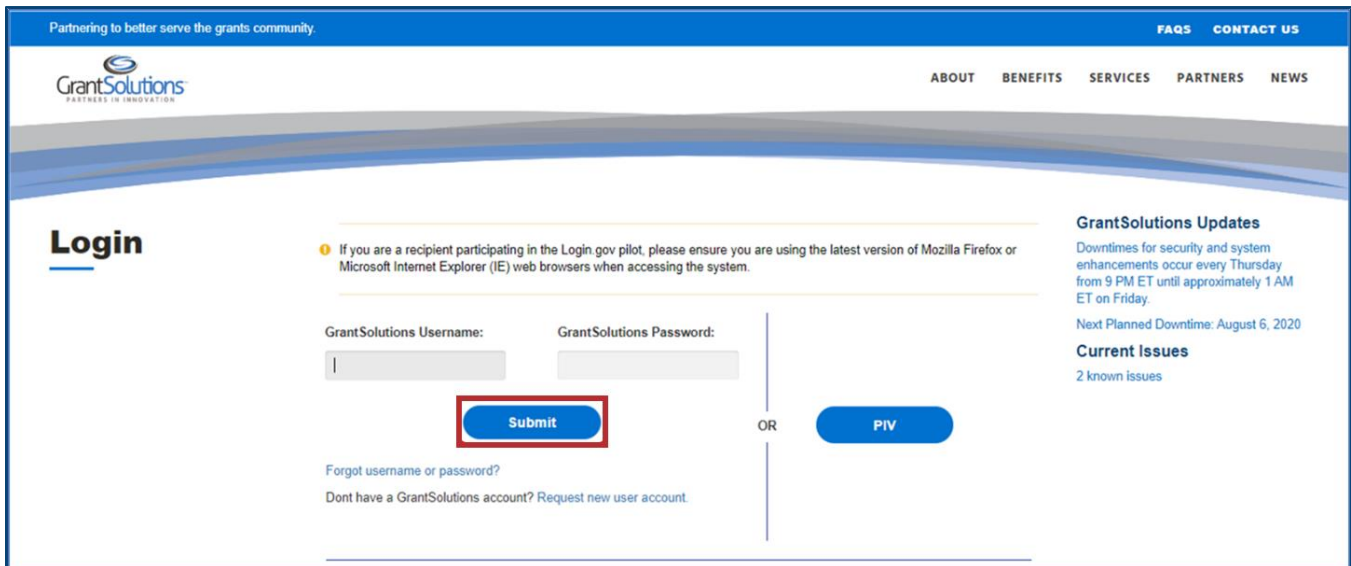


Figure 4: GrantSolutions public website

3. Enter a **username** and **password** and click the **Submit** button.



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Login

If you are a recipient participating in the Login.gov pilot, please ensure you are using the latest version of Mozilla Firefox or Microsoft Internet Explorer (IE) web browsers when accessing the system.

GrantSolutions Username:

GrantSolutions Password:

Submit OR **PIV**

Forgot username or password?

Dont have a GrantSolutions account? [Request new user account.](#)

GrantSolutions Updates

Downtimes for security and system enhancements occur every Thursday from 9 PM ET until approximately 1 AM ET on Friday.

Next Planned Downtime: August 6, 2020

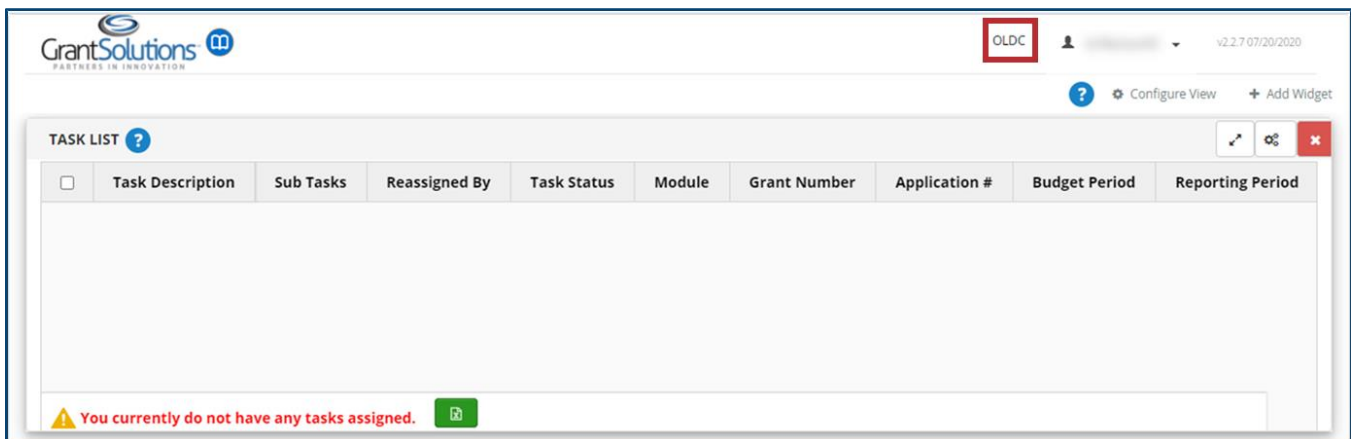
Current Issues

2 known issues

Figure 5: GrantSolutions Login screen with username and password fields and Submit button

The “Portal” screen appears.

4. Click the **OLDC** button in the top right to access OLDC.



GrantSolutions PARTNERS IN INNOVATION

OLDC v2.2.7 07/20/2020

Configure View + Add Widget

TASK LIST

<input type="checkbox"/>	Task Description	Sub Tasks	Reassigned By	Task Status	Module	Grant Number	Application #	Budget Period	Reporting Period
You currently do not have any tasks assigned.									

Figure 6: GrantSolutions Portal screen with OLDC button

The “OLDC Home” screen appears.

Note: Click the **Switch Home Page (Enhanced)** link in the top right corner to switch to *Enhanced* view. For purposes of this user guide, both the *Regular* and *Enhanced* view can be used.

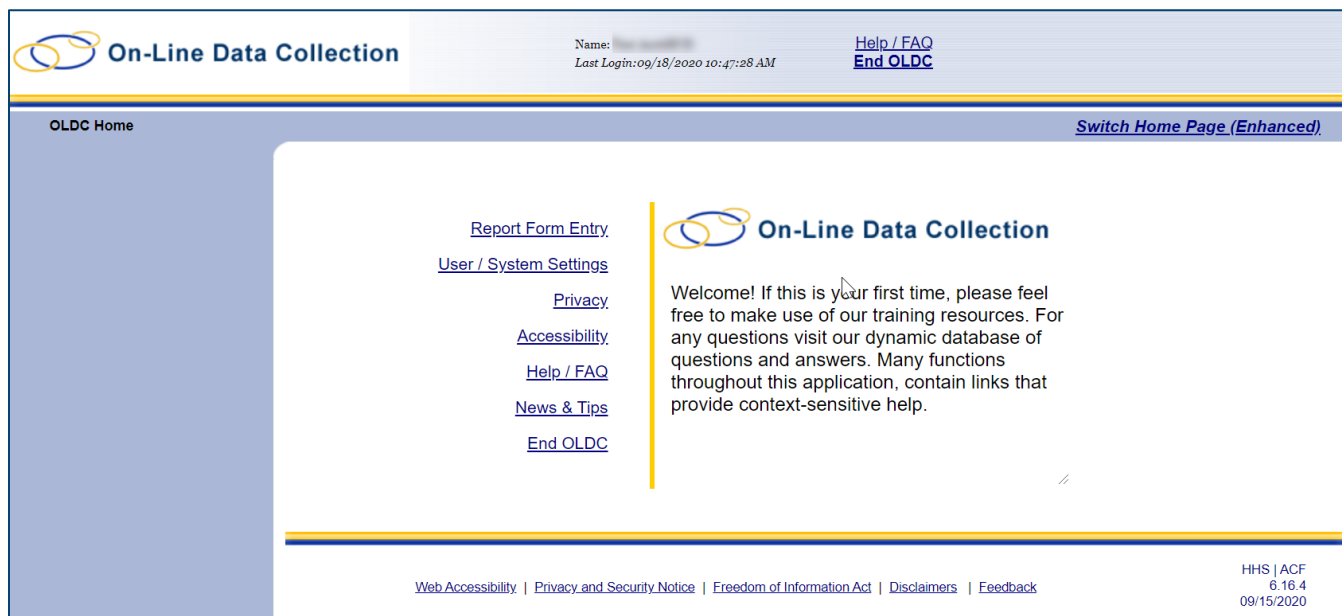


Figure 7: OLDC Home screen

Upload a Report

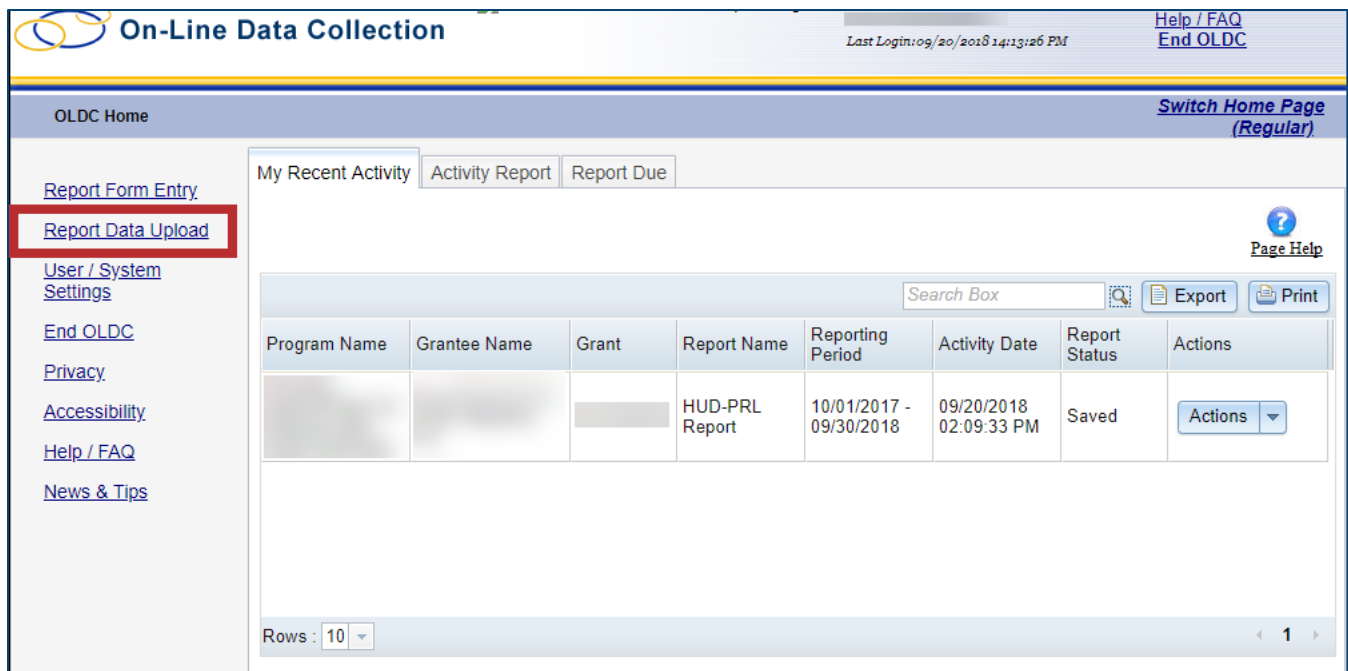
HUD recipients have the option to complete the Standards for Success Annual (PRL) Report in a Microsoft (MS) Excel or extensible Markup Language (XML) template and upload it to OLDC. If you decide to submit a PRL Report using either of these options, you must first notify HUD of your intention at AskGMO@hud.gov in order to acquire this functionality in GrantSolutions. Please find the MS Excel and XML templates at www.hudexchange.info/programs/standards-for-success/ under *Reporting Tools*, clicking on Other case management system, and clicking on the appropriate links.

If you do not use the *Upload a Report* feature to complete and submit reports, please follow the *Form Entry* process in this guide instead to complete and submit a report (see [Form Entry](#) section).

Note: Once uploaded, reports must still be validated, certified, and submitted in OLDC.

To upload a completed report using either the provided MS Excel or XML template, perform the following actions:

1. From the “OLDC Home” screen, click the **Report Data Upload** link on the side navigation menu.



The screenshot shows the OLDC Home interface. The left sidebar contains a navigation menu with links: Report Form Entry, Report Data Upload (highlighted with a red box), User / System Settings, End OLDC, Privacy, Accessibility, Help / FAQ, and News & Tips. The main content area has a header with 'On-Line Data Collection' and 'Last Login: 09/20/2018 14:13:26 PM'. Below the header, there are tabs for 'My Recent Activity', 'Activity Report', and 'Report Due'. A table displays report data with columns: Program Name, Grantee Name, Grant, Report Name, Reporting Period, Activity Date, Report Status, and Actions. The table contains one row for a 'HUD-PRL Report' with a reporting period of '10/01/2017 - 09/30/2018' and a status of 'Saved'. The 'Actions' column for this row has a dropdown menu. At the bottom of the table, there is a 'Rows' dropdown set to '10' and a pagination indicator showing '1'.

Figure 8: OLDC Home screen with Report Data Upload link

2. The “Report Data Upload” screen appears. Select a **Program Name** from the first drop-down.
3. Select a **Grantee Name** from the second drop-down.
4. Select a **Report Name** from the third drop-down.

The screenshot shows the 'Report Data Upload' screen. At the top, there are links for 'OLDC Home' and 'Report Data Upload'. The main heading is 'Report Data Upload'. Below this, there are three drop-down menus labeled 'Program Name:', 'Grantee Name:', and 'Report Name:'. The 'Report Name:' menu is open, showing a list of options. The first option is 'Standards for Success Annual Report (HUD - PRL)', which is highlighted. Red circles with numbers 1, 2, and 3 are placed over the first three drop-down menus respectively.

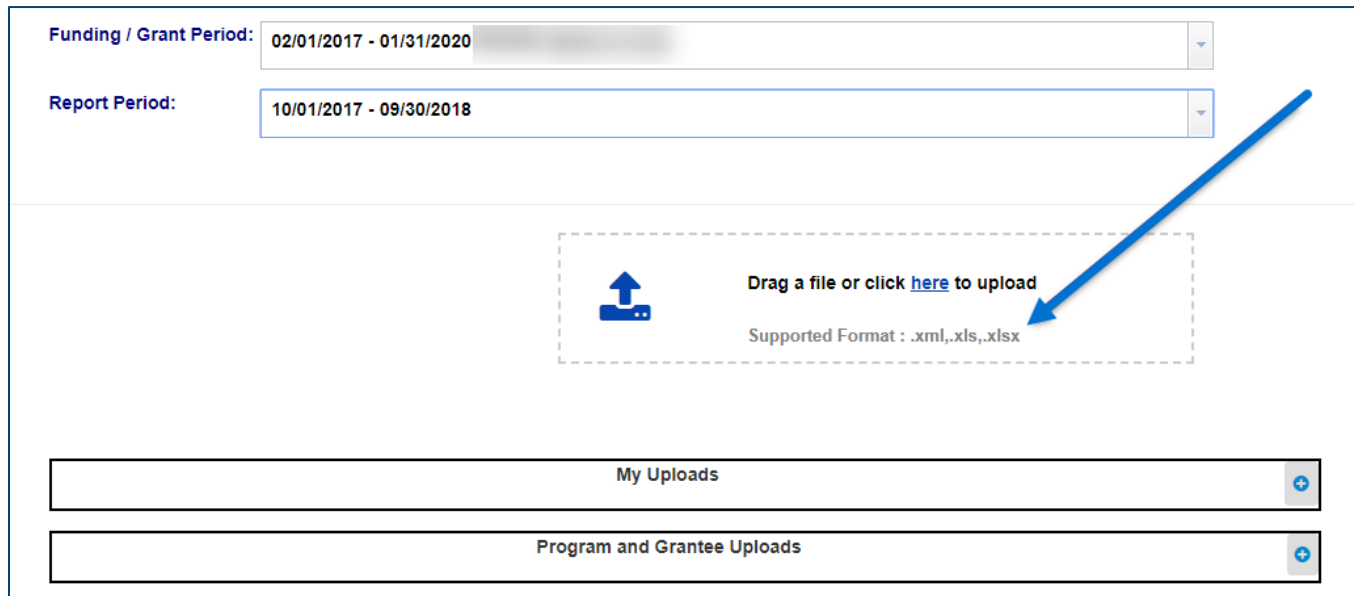
Figure 9: Report Data Upload screen with Program Name, Grantee Name, and Report Name drop-downs

5. The screen refreshes and two additional drop-downs appear. Select the **Funding / Grant Period** from the fourth drop-down.
6. Select the **Report Period** from the fifth drop-down.

The screenshot shows the 'Report Data Upload' screen after refreshing. It now includes five drop-down menus. The first three are the same as in Figure 9. The fourth menu, 'Funding / Grant Period:', is open and shows '02/01/2017 - 01/31/2020' selected. The fifth menu, 'Report Period:', is also open and shows '10/01/2017 - 09/30/2018' selected. Red circles with numbers 1 through 5 are placed over each of the five drop-down menus.

Figure 10: Report Data Upload screen with Funding/Grant Period and Report Period drop-downs

7. The screen refreshes and the *File Upload* box appears.

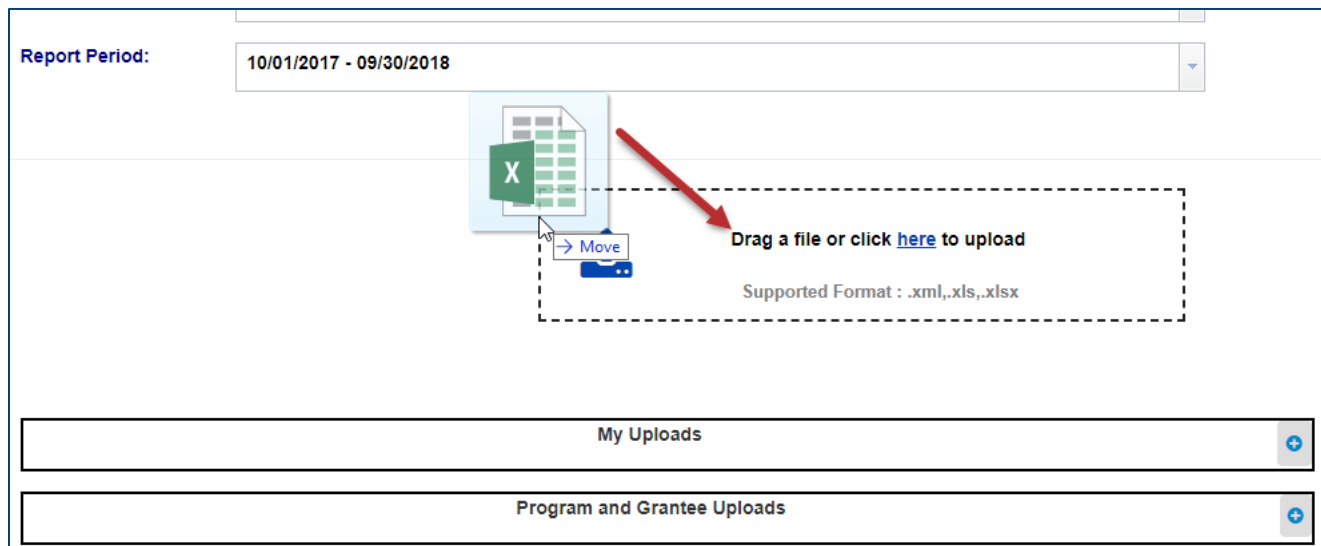


The screenshot shows the 'Report Data Upload' screen. At the top, there are two dropdown menus: 'Funding / Grant Period' set to '02/01/2017 - 01/31/2020' and 'Report Period' set to '10/01/2017 - 09/30/2018'. Below these is a dashed box representing the 'File Upload' area. Inside this box is an upload icon (a blue square with a white upward arrow) and the text 'Drag a file or click [here](#) to upload'. Below this text, it says 'Supported Format : .xml,.xls,.xlsx'. A blue arrow points from the top right towards the 'here' link. Below the upload box are two horizontal bars: 'My Uploads' and 'Program and Grantee Uploads', each with a plus icon on the right.

Figure 11: Report Data Upload screen with File Upload box

8. Upload the file in one of two ways:

- **Option 1:** Drag and drop the **completed template** from your computer to the *File Upload* box.



This screenshot is similar to Figure 11 but illustrates the drag-and-drop functionality. A Microsoft Excel file icon (a green square with a white 'X') is shown being dragged towards the 'File Upload' box. A red arrow points from the Excel icon to the dashed box. A small 'Move' tooltip is visible near the Excel icon. The 'File Upload' box contains the same text and supported formats as in Figure 11. The 'Report Period' dropdown is still set to '10/01/2017 - 09/30/2018'. Below the upload box are the 'My Uploads' and 'Program and Grantee Uploads' bars.

Figure 12: Report Data Upload screen with drag and drop functionality

- **Option 2:** Select the **here** link from the *File Upload* box and navigate to the completed template to add.

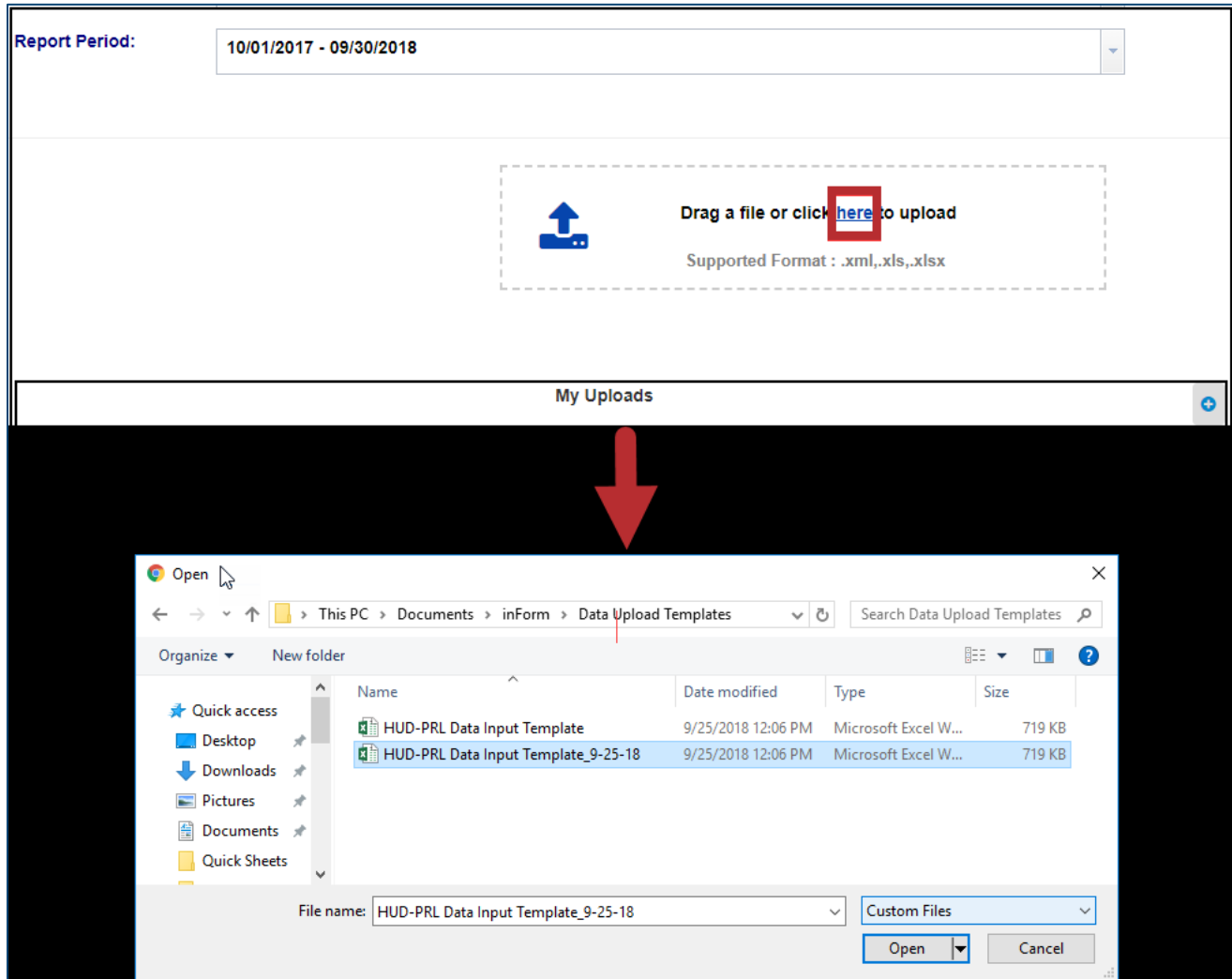
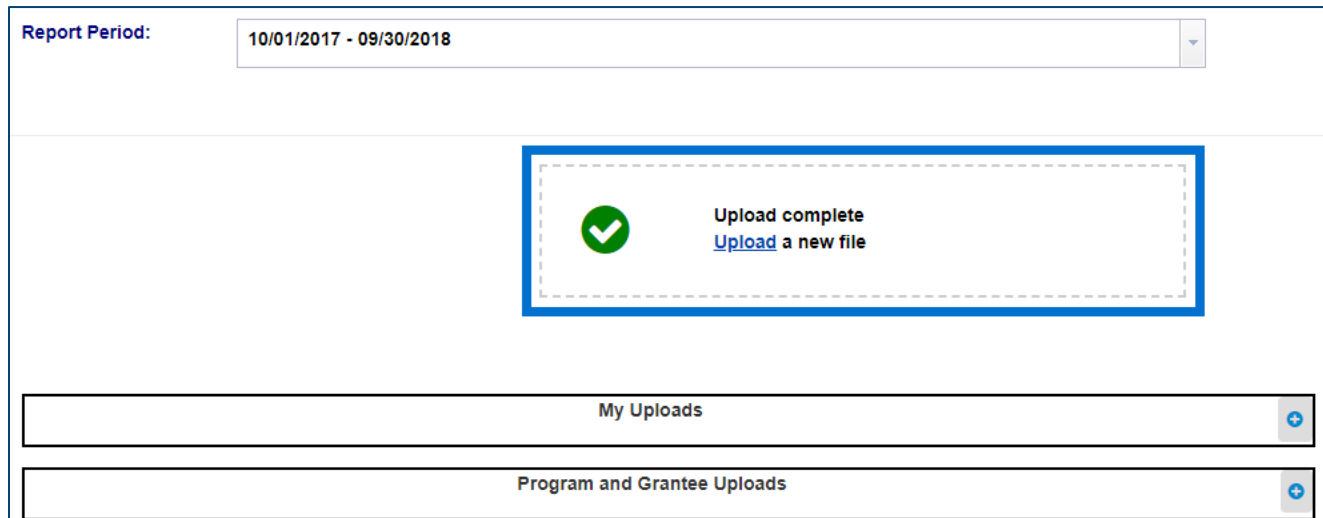


Figure 13: Report Data Upload screen with here link and file upload

9. The “Upload complete” message appears. A link is available to upload another file if needed.

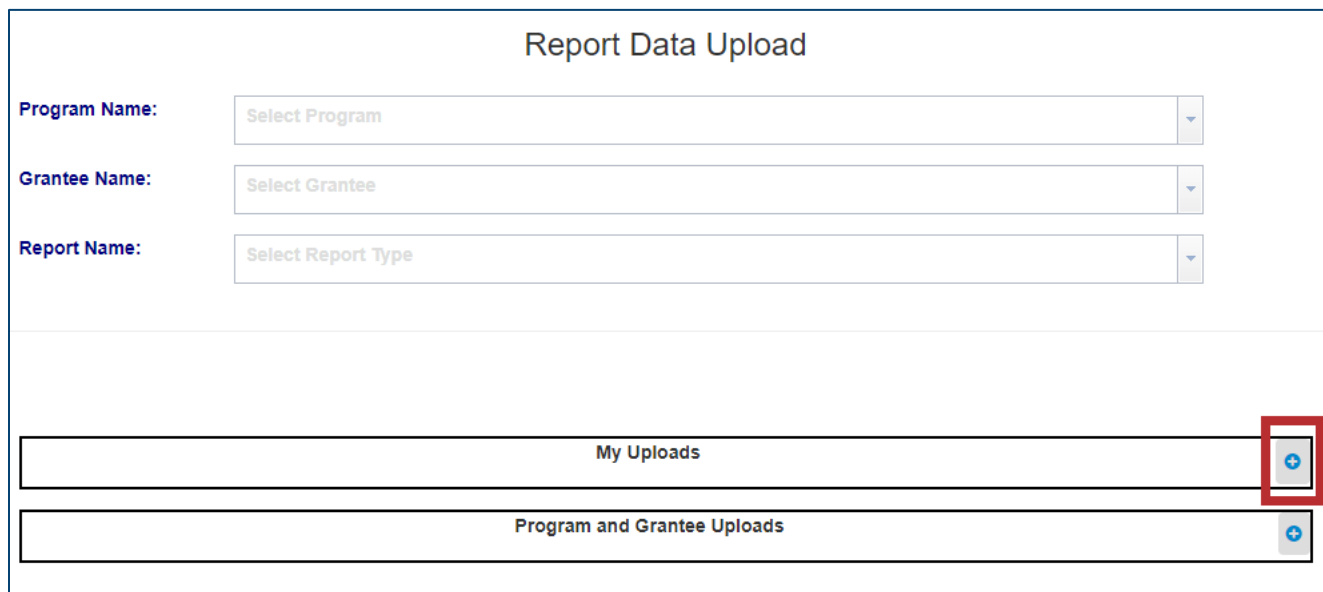


The screenshot shows the 'Report Data Upload' screen. At the top, there is a 'Report Period' dropdown menu set to '10/01/2017 - 09/30/2018'. In the center, a green checkmark icon is displayed next to the text 'Upload complete' and a blue link 'Upload a new file'. Below this, there are two expandable bars: 'My Uploads' and 'Program and Grantee Uploads', both with blue plus signs on the right side.

Figure 14: Report Data Upload screen with Upload complete message and Upload link

MY UPLOADS

At the bottom of the “Report Data Upload” screen, click the **blue plus sign** to expand the *My Uploads* bar and view the status of uploaded files.



The screenshot shows the 'Report Data Upload' screen. It features three dropdown menus: 'Program Name' (Select Program), 'Grantee Name' (Select Grantee), and 'Report Name' (Select Report Type). At the bottom, there are two expandable bars: 'My Uploads' and 'Program and Grantee Uploads'. The 'My Uploads' bar has a blue plus sign icon on the right side, which is highlighted with a red box.

Figure 15: Report Data Upload screen with blue plus sign icon and My Uploads bar

All uploaded files appear. Click the **down arrow** to view more information about an uploaded file.

My Uploads

Search an item

Show 5 entries

1

File Name	Status	Date Uploaded	Actions
HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	
HUD-PRL Data Input Template_test8.xlsx		08/20/2018 03:36:49 PM	
download1.xml		05/21/2018 04:16:16 PM	

1

Program and Grantee Uploads

Figure 16: Report Data Upload screen with uploaded files and down arrow

The row expands, and upload details are viewable.

My Uploads

Search an item

Show 5 entries

1

File Name	Status	Date Uploaded	Actions
HUD-PRL Data Input Template_9-25-18.xlsx	Failed	09/25/2018 12:24:37 PM	
HUD-PRL Data Input Template_test8.xlsx		08/20/2018 03:36:49 PM	
Report Name	Updated On	Uploaded By	Reporting Period
	08/20/2018 03:37:23 PM		-
download1.xml		05/21/2018 04:16:16 PM	

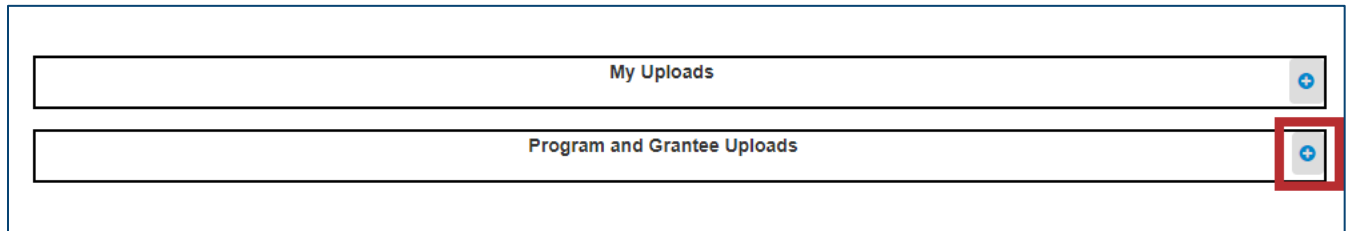
1

Program and Grantee Uploads

Figure 17: Report Data Upload screen with upload details

PROGRAM AND GRANTEE UPLOADS

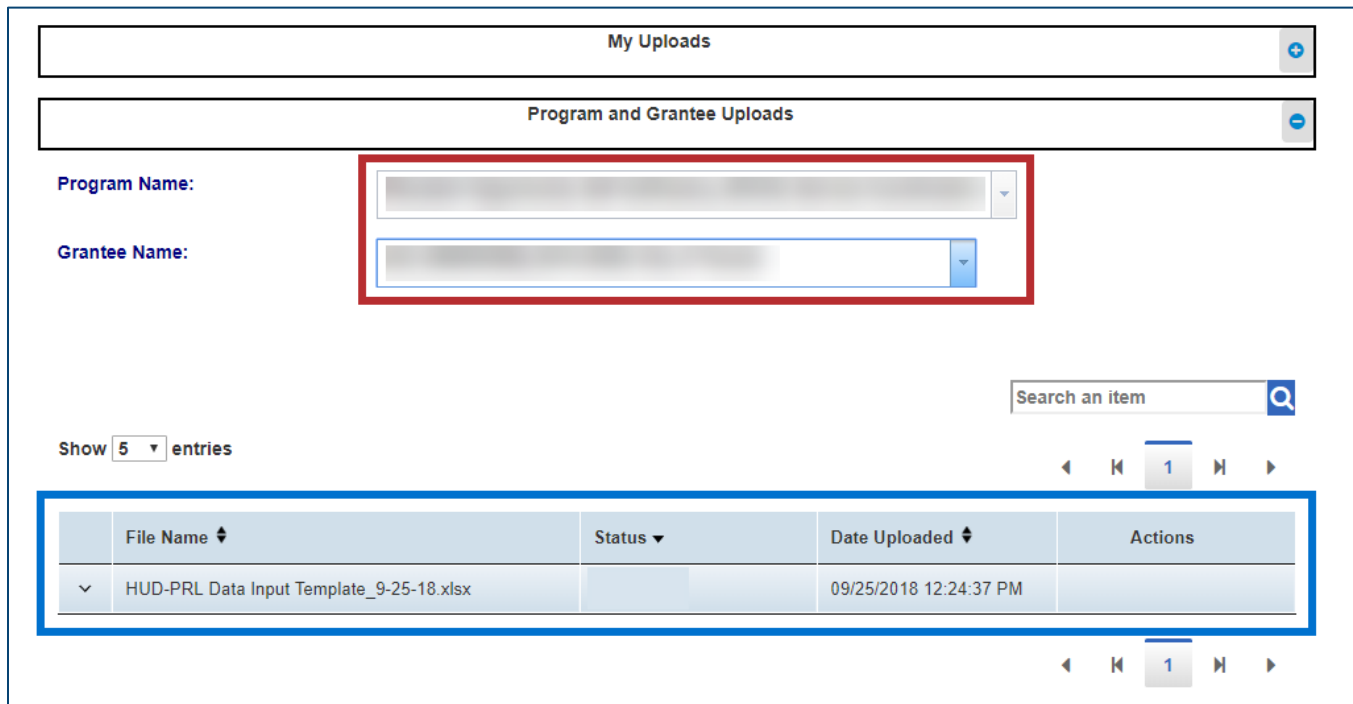
Click the **blue plus sign** to expand the *Program and Grantee Uploads* bar and filter uploaded files by Program Name and Grantee Name.



The screenshot shows a web interface with two horizontal bars. The top bar is labeled 'My Uploads' and has a blue plus sign icon on its right side. The bottom bar is labeled 'Program and Grantee Uploads' and also has a blue plus sign icon on its right side. This second icon is highlighted with a red rectangular box.

Figure 18: Report Data Upload screen with blue plus sign icon and Program and Grantee Uploads bar

Select the **Program Name** and the **Grantee Name** from the drop-down lists to display the list of uploaded files.



The screenshot shows the 'Program and Grantee Uploads' bar expanded, revealing a form with two drop-down menus labeled 'Program Name' and 'Grantee Name'. These menus are highlighted with a red rectangular box. Below the form is a search bar with the placeholder text 'Search an item' and a magnifying glass icon. To the left of the search bar is a 'Show 5 entries' label. Below the search bar is a table of uploaded files, which is highlighted with a blue rectangular box. The table has four columns: 'File Name', 'Status', 'Date Uploaded', and 'Actions'. The first row of data shows a file named 'HUD-PRL Data Input Template_9-25-18.xlsx' uploaded on '09/25/2018 12:24:37 PM'.

File Name	Status	Date Uploaded	Actions
HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	

Figure 19: Report Data Upload screen with Program Name and Grantee Name drop-downs and uploaded files

Click the **down arrow** to view more information about an uploaded file.

My Uploads

Program and Grantee Uploads

Program Name:

Grantee Name:

Search an item

Show

5

entries

	File Name	Status	Date Uploaded	Actions
▼	HUD-PRL Data Input Template_9-25-18.xlsx		09/25/2018 12:24:37 PM	

Figure 20: Report Data Upload screen with uploaded files and down arrow

MOST COMMON ERRORS WITH UPLOAD

Upon uploading a report, if an error exists during upload, the upload fails and an error message appears on the “Report Data Upload” screen. An upload failure may occur for various reasons. The following are troubleshooting tips and solutions for resolving any errors:

- If the provided MS Excel or XML template is modified with rearranged columns or other changes (e.g. the first “data” cell is not located in cell C8), please use an unmodified version of the template.
- If the provided MS Excel or XML template is not used to upload, please use a provided template.
- If a report is uploaded for a reporting period that already has a report in progress, the upload fails because a report is already added for this reporting period. A revised version of the report can only be added once the existing uploaded report is approved.
- If data in a non-date column is formatted as dates, please correct the format of data in non-date cells and/or columns.
- If text strings are present in addition to the “keys” in the cells, please enter only “keys” with no associated text strings.
- If values other than “1” or “0” are entered in the *Information Not Collected* columns, please enter “1” if the information was not collected from the participant and leave the column blank (or enter “0”) if the information was collected.
- If invalid values are entered in the *Number of Times* columns, enter valid values only. If the information was not collected, leave the column blank and enter “77” in the associated *Response Code* column.
- If invalid values are entered for various drop-down questions, enter valid values (e.g. if “3” is entered in the *Response Code* columns, please enter “1” for Yes, “77” for *Information Not Collected*, or “100” for *Not Applicable*).

Form Entry

INITIATE A REPORT

To begin processing a report, it must first be initiated. To initiate a report, perform the following:

1. On the “OLDC Home” screen, click the **Report Form Entry** button.

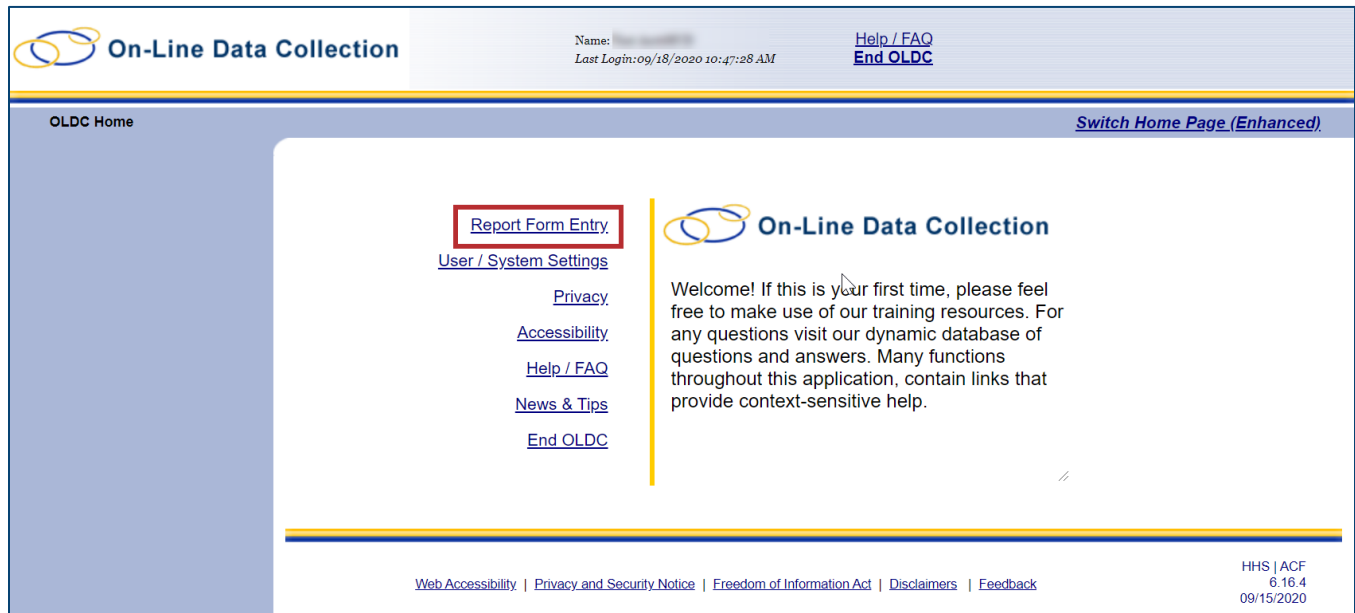


Figure 21: OLDC Home screen with Report Form Entry link

2. The “Form Selection screen appears. Select options in the **Program Name**, **Grantee Name**, and **Report Name** drop-downs.

- *Program Name*: The Program Name for which the report is associated with.
- *Grantee Name*: The Grantee Name for which the report is in reference to. This field also contains the name of the property the report is associated with.
- *Report Name*: The name of the report.

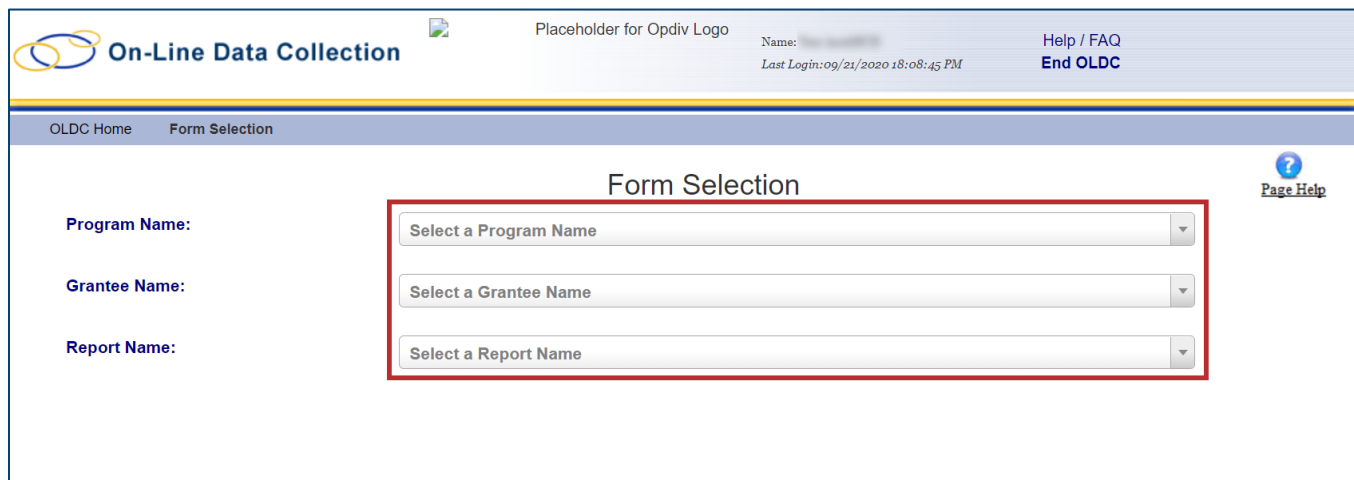


Figure 22: Form Selection screen with Program Name, Grantee Name, and Report Name drop-downs

Note: After the drop-downs are populated, a new *Funding/Grant Period* drop-down appears with the Grant Number.

3. Available report(s) for the organization appear in a results table. Click the **Create** icon in the **Actions** column for the desired report.

On-Line Data Collection

Placeholder for Opdiv Logo

Name: [redacted]
Last Login: 09/21/2020 18:08:45 PM

Help / FAQ
End OLDC

OLDC Home Form Selection

Form Selection

Program Name: [dropdown]

Grantee Name: [dropdown]

Report Name: [dropdown]

Funding / Grant Period: 10/01/2016 - 09/30/2020 [dropdown]

Show 15 entries

Search: [input]

Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual		+ [icon]
10/01/2018 - 09/30/2019	Annual		+ [icon]
10/01/2017 - 09/30/2018	Annual		+ [icon]
10/01/2016 - 09/30/2017	Annual		+ [icon]

Page 1 of 1

Figure 23: Form Selection screen with results table and Create button

- The “Report Sections” screen appears. On the “Report Sections” screen, various sections that must be completed on the form appear. Edit any section within the report from this screen. All sections bear the *Initialized* status in the *Section Status* column.

Report Sections

Program Name: [REDACTED]

Grantee Name: [REDACTED]

Report Name: [REDACTED]

Funding/Grant Period: 10/01/2016 - 09/30/2020 [REDACTED]

Report Period: 10/01/2019 - 09/30/2020

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](#)

Show 30 entries Search:

<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Cover Page	Select Action: ▼ Go	<div style="border: 2px solid #007bff; padding: 2px;">Initialized</div>
* Household Identifier 0	Select Action: ▼ Go	<div style="border: 2px solid #007bff; padding: 2px;">Initialized</div>

Figure 24: Report Sections screen and Initialized Section Statuses

Note: Upon searching for the report again, the **Create (+)** icon is replaced with an **Edit (✎)** icon.

REPORT SECTION – COVER PAGE

On the “Report Sections” screen, the *Cover Page* section contains basic information about the report and the recipient organization that appears on the cover page of the Participant Record-level Report (PRL).

Edit Section

To edit the *Cover Page* section, perform the following:

1. In the *Cover Page* row, select the **Edit Section** option from the *Select Action* drop-down in the *Perform Action* column. Click the **Go** button.

Report Sections

Program Name: _____

Grantee Name: _____

Report Name: _____

Funding/Grant Period: 10/01/2016 - 09/30/2020 _____

Report Period: 10/01/2019 - 09/30/2020 _____

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](#)

Show 30 entries

Search:

<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Cover Page	<div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 2px;"> Select Action: ▼ </div> <div style="margin-left: 5px;">Go</div> </div>	Initialized
* Household Identifier 0	<div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 2px;"> Select Action: ▼ </div> <div style="margin-left: 5px;">Go</div> </div> <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"> Edit Section </div>	Initialized

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 25: Report Sections screen with Edit Section option and Go button

- The “Cover Page” screen appears with organizational information.



On-Line Data Collection

Name: [Redacted] [Help / FAQ](#)
Last Login: 09/21/2020 18:12:48 PM [End OLDC](#)

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

Program Name: [Redacted]
Grantee Name: [Redacted]
Report Name: [Redacted]
Funding/Grant Period: 10/01/2016 - 09/30/2020
Report Period: 10/01/2019 - 09/30/2020
Report Status: Initialized
Section Status: Initialized

Report Progress

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

[Save](#) [View/Add Attachments](#) [Validate](#) [Next Section](#)

U.S. Department of Housing and Urban Development
Participant Record-level Report (PRL)

Participant Record-level Report (HUD - PRL) Cover Page

OMB APPROVED
Control No. 2501-0034
Expires 11/30/2022

1. Federal Agency and Organizational Element to Which Report is Submitted: The Department of Housing and Urban Development	2. Federal Grant(s) or Other Identifying Number(s) by Federal Agency(ies): [Redacted]
3. Recipient Organization: [Redacted]	4a. DUNS Number: [Redacted]
Address Line 1 [Redacted]	4b. Catalog of Federal Domestic Assistance Number (CFDA) [Redacted]

Figure 26: Cover Page screen

- Review the organizational information on the “Cover Page” screen to ensure that data is correct. If the data is not correct, please contact the GrantSolutions Help Desk (help@grantsolutions.gov).

Note: Enter the **Catalog of Federal Domestic Assistance Number (CFDA)** or **Comments** in the appropriate fields if necessary.

4. Click the **Save** button to save progress.
5. Click the **Validate** button to move the report forward.

Note: A separate validation is required for each report section.



Figure 27: Save button and Validate button

The status in the *Section Status* field at the top of the screen becomes *Saved -- Validated*.

Figure 28: Section Status field with Saved -- Validated status

6. Click the **Next Section** button or use the **Report Sections** drop-down to return to the “Report Sections” screen.

Figure 29: Next Section button and Report Sections drop-down

REPORT SECTION – HOUSEHOLD IDENTIFIER

On the “Report Sections” screen, the *Household Identifier* section contains important information and response options for participants of each household.

Create Additional Section

To create an additional *Household Identifier* section for households with multiple participants, perform the following:

1. In the *Household Identifier* row, select the **Create Section** option from the *Select Action* drop-down in the *Perform Action* column. Click the **Go** button.

Report Sections

Program Name: [redacted]
Grantee Name: [redacted]
Report Name: [redacted]
Funding/Grant Period: 10/01/2016 - 09/30/2020
Report Period: 10/01/2019 - 09/30/2020

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

Show 30 entries Search: [redacted]

Section Name:	Select Action:	Perform Action:	Section Status:
Cover Page	<div> <div>Select Action:</div> <div>Create Section</div> <div>Clear Section Data</div> <div>Edit Section</div> <div>Print Section</div> <div>Select Action:</div> </div>	Go	Saved -- Validated
* Household Identifier 0	<div> <div>Select Action:</div> <div>Create Section</div> <div>Clear Section Data</div> <div>Edit Section</div> <div>Print Section</div> <div>Select Action:</div> </div>	Go	Saved -- with Errors

Figure 30: Report Sections screen with Create Section option and Go button

2. A confirmation message appears in the browser. Click the **OK** button.

grantsolutions.gov says

This will create a new section from the section: Household Identifier 0

Do you wish to continue?

OK Cancel

Figure 31: Create a new section message

3. On the “Report Sections” screen, a new *Household Identifier* section appears in the table below.

Show entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: <input type="button" value="Go"/>	Saved -- Validated
* Household Identifier 0	Select Action: <input type="button" value="Go"/>	Saved -- with Errors
* Household Identifier 1	Select Action: <input type="button" value="Go"/>	Initialized

Showing 1 to 3 of 3 entries Previous Next

[View/Add Attachments](#) [Validate](#) [Print Full Report](#)

Figure 32: Report Sections screen with new Household Identifier section

Edit Section

To edit the *Household Identifier* section, perform the following:

1. In a *Household Identifier* row, select the **Edit Section** option from the *Select Action* drop-down in the *Perform Action* column. Click the **Go** button.

Report Sections

[Program Name:](#) _____

[Grantee Name:](#) _____

[Report Name:](#) _____

[Funding/Grant Period:](#) 10/01/2016 - 09/30/2020

[Report Period:](#) 10/01/2019 - 09/30/2020

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](#)

Show entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: <input type="button" value="Go"/>	Saved -- Validated
* Household Identifier 0	<div style="border: 1px solid #ccc; padding: 2px;"> Select Action: Create Section Clear Section Data Delete Section Edit Section Print Section Edit Section <input type="button" value="Go"/> </div>	Saved -- with Errors

Figure 33: Report Sections screen with Edit Section option and Go button

- The “Household Identifier” screen appears with household information.

Figure 34: Household Identifier screen

- In fields 1-5, enter the appropriate **text** or **option** into each field.

Note: Click the **field** links for an explanation of how to complete each field.

Figure 35: Household Identifier screen with fields 1-5

4. In fields 6-25, enter the appropriate **Response Option** in each drop-down or text box. If appropriate, select the **Information Not Collected** checkbox for the applicable *Data Element Name*.

Note: Some fields may require the *Number of Times* after selecting the **Yes** Response Option.

Data Element Name	Response Options
6. Gender Code	Male <input type="button" value="v"/>
7. Ethnicity Code	Not Hispanic/Latino <input type="button" value="v"/>
8. Race Code	<div> American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Mixed Race Information not collected </div> <input type="button" value="v"/>
9. Head of Household Code	Yes <input type="button" value="v"/>
10. Residence Census Tract	<input type="text"/> Information Not Collected <input checked="" type="checkbox"/>
11. Veteran Status Code	No <input type="button" value="v"/>
12. Time in Subsidized Housing Number	<input type="text"/> Information Not Collected <input checked="" type="checkbox"/>
13. Disability Status Code	No, individual indicates no disability as <input type="button" value="v"/>
14. Disability Category Code	N/A <input type="button" value="v"/>
15. Disability Requires Assistance Code	N/A <input type="button" value="v"/>
18. Supplemental Nutrition Assistance Program (SNAP) Code	No <input type="button" value="v"/>
19. Temporary Assistance to Needy Families (TANF) Code	No <input type="button" value="v"/>
20. Supplemental Security Income (SSI) Code	No <input type="button" value="v"/>
21. Social Security Disability Insurance (SSDI) Code	No <input type="button" value="v"/>
23. HIV/AIDS Service Code	Yes <input type="button" value="v"/>
	23. Number of Times: <input type="text" value="2"/>
25. Primary Health Care Provider Code	No <input type="button" value="v"/>

Figure 36: Household Identifier screen with fields 6-25

5. In fields 26-68, enter the appropriate **Response Option** in each drop-down or text box. If appropriate, select the **Information Not Collected** checkbox for the applicable *Data Element Name*.

Note: Some fields may require the *Number of Times* after selecting the **Yes** Response Option.

26. Health Coverage Code	Yes, covered through employer or union (current or former) Yes, purchased insurance from insurance company Medicare Medicaid/Medical Assistance TRICARE or other military health care VA health care Indian Health Service	
27. Medical Examination Status Code	No	
30. Asthma Condition Code	No	
32. Emergency Room/Hospital Visit Code	No	
35. Activities of Daily Living (ADL) Count		Information Not Collected <input checked="" type="checkbox"/>
36. Instrumental Activities of Daily Living (IADL) Count		Information Not Collected <input checked="" type="checkbox"/>
37. Adult Personal Assistance Service Code	N/A	
41. Medical Care Service Code	Yes	
	41. Number of Times:	3
42. Mental Health Service Code	N/A	
43. Substance Abuse Service Code	N/A	
44. Substance Abuse Treatment Code	N/A	
50. Highest Education Level Code	No schooling completed, Nursery schc	
60. Household Annual Gross Income Amount	\$ 100,000	Information Not Collected <input type="checkbox"/>
66. Intermediate Housing Status Code	N/A	
68. Household Housing Cost Amount	\$	Information Not Collected <input checked="" type="checkbox"/>

Figure 37: Household Identifier screen with fields 26-68

6. In fields 69-95, enter the appropriate **Response Option** in each drop-down or text box. If appropriate, select the **Information Not Collected** checkbox for the applicable *Data Element Name*.

Note: Some fields may require the *Number of Times* after selecting the **Yes** Response Option.

69. Household Transportation Cost Amount	\$ <input type="text"/>	Information Not Collected <input checked="" type="checkbox"/>
72. ESL Class Service Code	Yes <input type="button" value="v"/>	
	72. Number of Times: <input type="text" value="3"/>	
79. Fair Housing and Civil Rights Assistance Service Code	N/A <input type="button" value="v"/>	
80. Tax Preparation Service Code	N/A <input type="button" value="v"/>	
81. Earned Income Tax Credit Recipient Code	N/A <input type="button" value="v"/>	
82. Financial Account Creation Code	N/A <input type="button" value="v"/>	
83. Financial Account Creation Service Code	N/A <input type="button" value="v"/>	
84. Legal Assistance Service Code	Yes <input type="button" value="v"/>	
	84. Number of Times: <input type="text" value="5"/>	
85. Legal Assistance Type Service Code	N/A <input type="button" value="v"/>	
86. Financial Education Service Code	N/A <input type="button" value="v"/>	
87. Pre-Housing Counseling Service Code	N/A <input type="button" value="v"/>	
88. Post-Housing Counseling Service Code	N/A <input type="button" value="v"/>	
89. Food and Nutrition Service Code	N/A <input type="button" value="v"/>	
90. Conflict Resolution Service Code	N/A <input type="button" value="v"/>	
92. Translation/Interpretation Service Code	N/A <input type="button" value="v"/>	
93. Housing Retention Service Code	N/A <input type="button" value="v"/>	
94. Household Skills/Life Skills Service Code	N/A <input type="button" value="v"/>	
95. Needs Assessment Service Code	N/A <input type="button" value="v"/>	

Figure 38: Household Identifier screen with fields 69-95

7. In fields 96-110, enter the appropriate **Response Option** in each drop-down or text box and the **Property ID** in the *iREMS Number* field. If appropriate, select the **Information Not Collected** checkbox for the applicable *Data Element Name*.

Note: Some fields may require the *Number of Times* after selecting the **Yes** Response Option.

96. Service Coordination Service Code	N/A	
101. Independent Living Service Code	Yes	
	101. Number of Times:	2
102. Transportation Assistance Service Code	N/A	
106. Housing Placement Service Code	N/A	
107. Permanent Housing Placement/Turnover Reason Code	Moved Out: With family	
108. Permanent Housing Placement/Turnover Date		Information Not Collected <input checked="" type="checkbox"/>
109. Service Start Date	6/1/2020	Information Not Collected <input type="checkbox"/>
110. Service End Date	9/1/2020	Information Not Collected <input type="checkbox"/>
<i>iREMS Number:</i> <input type="text"/>		

Figure 39: Household Identifier screen with fields 96-110 and *iREMS Number* field

8. Click the **Save** button to save progress.
9. Click the **Validate** button to move forward.

Note: A separate validation is required for each report section.



Figure 40: Save button and Validate button

The status in the *Section Status* field at the top of the screen becomes *Saved – Validated*.

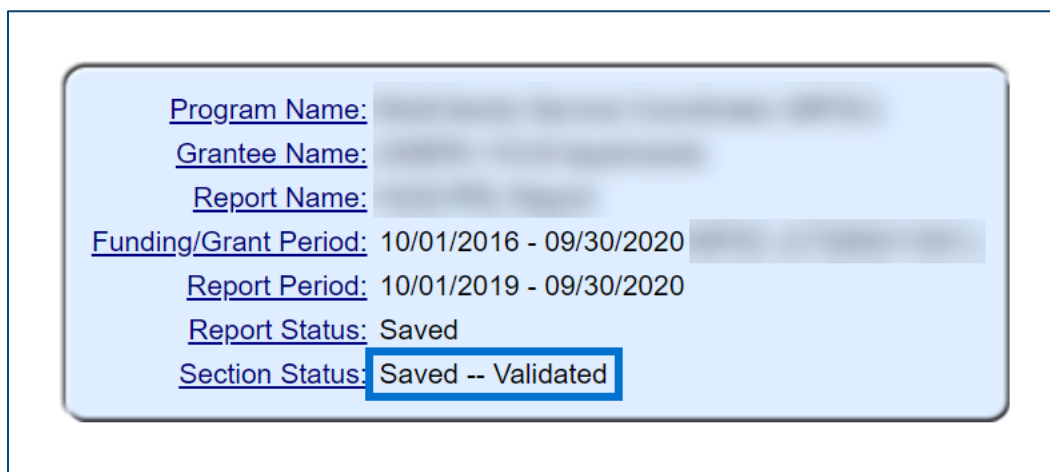
A screenshot of a form section with a light blue background. It contains several fields with labels and values: 'Program Name:' followed by a blurred value; 'Grantee Name:' followed by a blurred value; 'Report Name:' followed by a blurred value; 'Funding/Grant Period:' with the value '10/01/2016 - 09/30/2020'; 'Report Period:' with the value '10/01/2019 - 09/30/2020'; 'Report Status:' with the value 'Saved'; and 'Section Status:' with the value 'Saved -- Validated'. The 'Section Status' field is highlighted with a blue rectangular box.

Figure 41: Section Status field with Saved -- Validated status

Correcting Report Errors

Upon clicking the **Validate** button, if an error exists on the report, an error message appears near the top of the screen above the report header.

The screenshot shows the 'Report Progress' bar at the top with stages: Initialized (checked), Edit-Saved (checked), Validated (unchecked), Certified (unchecked), Submitted (unchecked), In Review (unchecked), R/O Approved (unchecked), and C/O Approved (unchecked). Below the bar are buttons: Previous Section, Save, View/Add Attachments, and Validate. An error message box on the left states: 'Error #1: [20164] Participant Status Code - Missing Value. [Goto Error] [Long Description]'. The main form area is titled 'Household Identifier 1' and contains the 'Participant Record-level Report (HUD - PRL) Cover Page' with fields for Person Identifier, Household Identifier, Age, Participant Status Code (a dropdown menu), and Service Start Date / Intake Date.

Figure 42: Report error message

To resolve the error:

1. Click the **Goto Error** link under the error message and edit the appropriate field on the screen that the error is regarding.

This screenshot is similar to Figure 42 but highlights the 'Goto Error' link in the error message box with a red rectangle. Additionally, the '3. Participant Status Code' dropdown menu in the form is also highlighted with a red rectangle, indicating the field that needs to be corrected.

Figure 43: Report with Goto Error link and section requiring correction

2. Click the **Validate** button at the bottom.

The status in the *Section Status* field at the top of the screen becomes *Saved – Validated*.

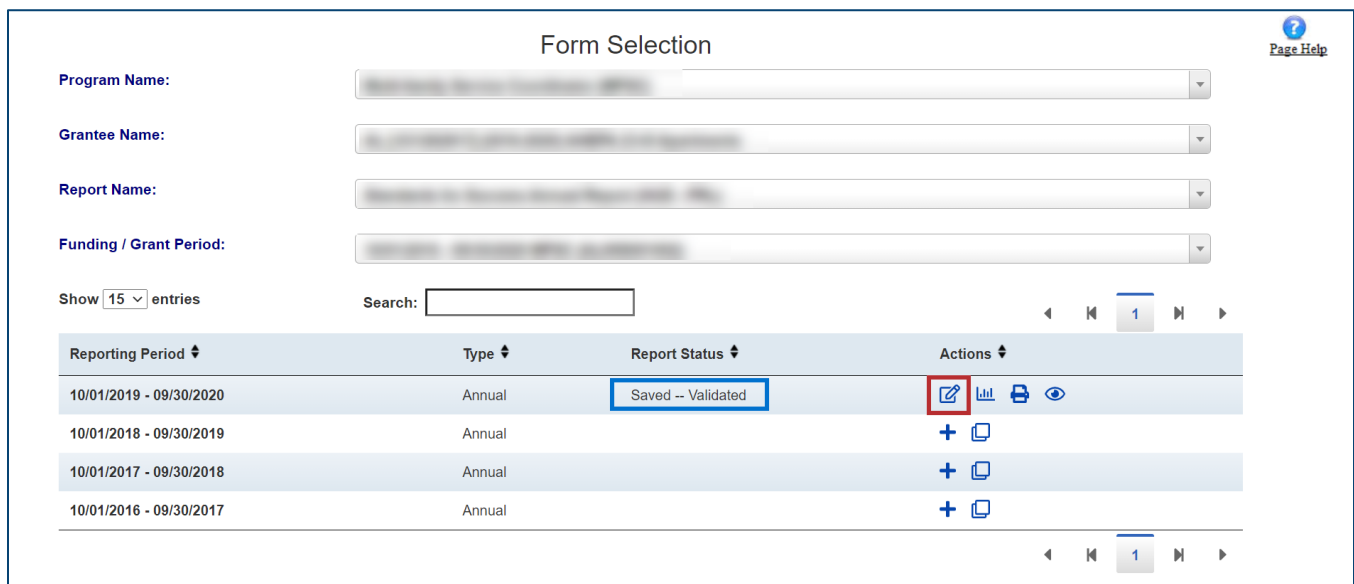
Certify & Submit a Report

CERTIFY A REPORT

Recipient users must certify a report before it can be submitted for review. The **Certify** button appears only for users with permission to certify and submit when the form is in the *Saved – Validated* report status.

To certify a report, perform the following:

1. On the “Form Selection” screen, locate a report in the *Saved – Validated* report status and click the **Edit** icon in the *Actions* column.



The screenshot shows the 'Form Selection' interface. At the top, there are four dropdown menus for 'Program Name', 'Grantee Name', 'Report Name', and 'Funding / Grant Period'. Below these is a 'Show 15 entries' dropdown and a 'Search:' text box. The main part of the screen is a table with four columns: 'Reporting Period', 'Type', 'Report Status', and 'Actions'. The first row of the table is highlighted in light blue and has a red box around the 'Edit' icon (a pencil) in the 'Actions' column. The 'Report Status' for this row is 'Saved -- Validated'. The other three rows have a '+' icon and a document icon in the 'Actions' column. At the bottom right of the table, there are pagination controls showing '1' and arrows.







Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual	Saved -- Validated	  
10/01/2018 - 09/30/2019	Annual		+ 
10/01/2017 - 09/30/2018	Annual		+ 
10/01/2016 - 09/30/2017	Annual		+ 

Figure 44: Form Selection screen with Edit icon and Saved – Validated status

2. On the “Report Sections” screen, review the report.

3. On the “Report Sections” screen, click the **Validate** button.

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](#)

Show entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: <input type="button" value="Go"/>	Saved -- Validated
* Household Identifier #: <input type="text"/>	Select Action: <input type="button" value="Go"/>	Saved -- Validated

Showing 1 to 2 of 2 entries Previous Next

[View/Add Attachments](#)
[Validate](#)
[Print Full Report](#)

Figure 45: Report Sections screen with Validate button

4. When the screen refreshes, click the **Certify** button.

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

Show entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: <input type="button" value="Go"/>	Saved -- Validated
* Household Identifier #: <input type="text"/>	Select Action: <input type="button" value="Go"/>	Saved -- Validated

Showing 1 to 2 of 2 entries Previous Next

[View/Add Attachments](#)
[Validate](#)
[Certify](#)
[Print Full Report](#)

Figure 46: Report Sections screen with Certify button

5. A confirmation message appears in a new window. Click the **OK** button in the browser.

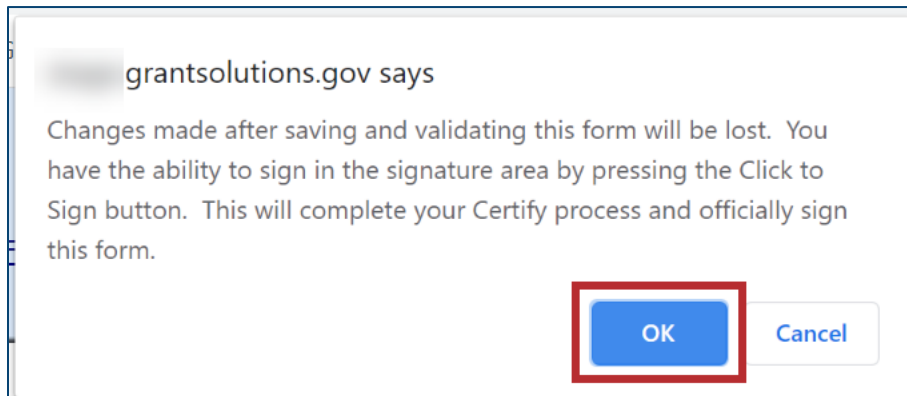


Figure 47: Certify confirmation message with OK button

6. The “Cover Page” screen appears. Click the **Click to Sign** button at the bottom.


Participant Record-level Report (HUD - PRL) Cover Page			
1. Federal Agency and Organizational Element to Which Report is Submitted: The Department of Housing and Urban Development		2. Federal Grant(s) or Other Identifying Number(s) by Federal Agency(ies):	
3. Recipient Organization:		4a. DUNS Number:	
Address Line 1		4b. Catalog of Federal Domestic Assistance Number (CFDA)	
Address Line 2			
Address Line 3			
City	State	Zip Code	Zip Ext.
8a. Project/Grant Period Start Date: 01/01/2019	8b. Project/Grant Period End Date: 12/31/2019	8c. Reporting Period End Date: 09/30/2020	
10. Comments (attach additional sheets if necessary): 			
<div></div>			
10. Certification: I certify to the best of my knowledge and belief that all information presented in this report is true, correct and complete and constitutes a material representation of fact upon which the Federal government may rely.			
11a. Typed or Printed Name and Title of Authorized Certifying Official:		11c. Telephone (area code, number, extension):	
11b. Signature of Authorized Certifying Official:		11d. Email Address:	
<div>Click to Sign</div>		11e. Date Report Submitted (MM/DD/YYYY):	

Figure 48: Cover Page screen with Click to Sign button

The “Cover Page” screen reappears, and the *Report Status* and *Section Status* become *Certified*.

The screenshot displays the 'Cover Page' interface. At the top, a box contains the following information:

- Program Name: [Redacted]
- Grantee Name: [Redacted]
- Report Name: [Redacted]
- Funding/Grant Period: 10/01/2016 - 09/30/2020
- Report Period: 10/01/2019 - 09/30/2020
- Report Status: **Certified**
- Section Status: **Certified**

Below this is a 'Report Progress' bar with the following stages: **Initialized**, **Edit-Saved**, **Validated**, **Certified** (highlighted), Submitted, In Review, R/O Approved, and C/O Approved. Each stage has a corresponding checkbox, with the 'Certified' checkbox checked.

Navigation buttons include 'View Attachments' and 'Next Section'.

The main content area shows:

- U.S. Department of Housing and Urban Development
- Participant Record-level Report (PRL)
- OMB APPROVED (Control No: 2501-0034, Expires 11/30/2022)
- Participant Record-level Report (HUD - PRL) Cover Page**

At the bottom, there are two fields:

1. Federal Agency and Organizational Element to Which Report is Submitted: The Department of Housing and Urban Development
2. Federal Grant(s) or Other Identifying Number(s) by Federal Agency(ies): [Redacted]

Figure 49: Cover Page screen with Certified Report Status and Section Status

At the bottom of the “Cover Page” screen, a signature is added to the *Signature of Authorized Certifying Official* field.

This screenshot shows the 'Cover Page' with a signature added. The '11b. Signature of Authorized Certifying Official:' field contains a digital signature. Other fields include:

- 10. Certification: I certify to the best of my knowledge and belief that all information presented in this report is true, correct and complete and constitutes a material representation of fact upon which the Federal government may rely.
- 11a. Typed or Printed Name and Title of Authorized Certifying Official: Test AccttHUD
- 11c. Telephone (area code, number, extension):
- 11d. Email Address:
- 11e. Date Report Submitted (MM/DD/YYYY): 10/13/2020

Navigation buttons 'View Attachments' and 'Next Section' are at the bottom.

Figure 50: Cover Page screen with Signature of Authorized Certifying Official

Note: The *Date Report Submitted* field populates once the report is submitted. The field remains unpopulated when the signature is added.

SUBMIT A REPORT

Recipient users must submit a report to officially send it to Federal staff for review. A report cannot be submitted if the submission due date has passed. The **Submit** button appears only for users with permission to certify and submit when the form is in *Certified* status.

To submit a report, perform the following:

1. On the “Form Selection” screen, locate a report in the *Certified* report status and click the **Edit** icon in the *Actions* column.

The screenshot shows the 'Form Selection' interface. At the top, there are four dropdown menus for 'Program Name', 'Grantee Name', 'Report Name', and 'Funding / Grant Period'. Below these is a 'Show 15 entries' dropdown and a 'Search:' text box. The main part of the screen is a table with the following columns: 'Reporting Period', 'Type', 'Report Status', and 'Actions'. The first row of the table has '10/01/2019 - 09/30/2020' for the reporting period, 'Annual' for the type, and 'Certified' for the status. The 'Actions' column for this row contains four icons: a pencil (highlighted with a red box), a bar chart, a printer, and an eye. Below this row are three more rows, each with a reporting period, 'Annual' type, and a '+' icon in the actions column. The table is surrounded by pagination controls, including arrows and a '1' in a box.

Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual	Certified	[Edit icon] [Bar chart icon] [Printer icon] [Eye icon]
10/01/2018 - 09/30/2019	Annual		+ [Copy icon]
10/01/2017 - 09/30/2018	Annual		+ [Copy icon]
10/01/2016 - 09/30/2017	Annual		+ [Copy icon]

Figure 51: Form Selection screen with Edit icon and Certified status

2. On the “Report Sections” screen, review the report.

3. Click the **Submit** button.

Report Sections

Program Name: [REDACTED]
Grantee Name: [REDACTED]
Report Name: [REDACTED]
Funding/Grant Period: 10/01/2016 - 09/30/2020
Report Period: 10/01/2019 - 09/30/2020

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:

- Print Section - Opens a new browser window with the report in a print-friendly version.
- View Section - Opens the form section in a read-only version.

View Attachments UnCertify **Submit** Print Full Report

Show 30 entries Search:

<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Cover Page	Select Action: ▼ Go	Certified
Household Identifier #: [REDACTED]	Select Action: ▼ Go	Certified

Showing 1 to 2 of 2 entries Previous 1 Next

Figure 52: Report Sections screen with Submit button

4. A confirmation message appears in a new window. Click the **OK** button in the browser.

grantsolutions.gov says

This will officially submit your report. Do you wish to continue?

OK

Cancel

Figure 53: Submit confirmation message with Ok button

- The "Report Status History" screen appears, and a submission received message appears. Click the **OK** button.

Note: Attachments referred to in the submission received message refers to any associated attachments when submitting all types of report forms within GrantSolutions.



Figure 54: Submission received message with OK button

The *Report Status* becomes *Submitted*.

Form Selection **Report Form Status**

Program Name: [REDACTED]
 Grantee Name: [REDACTED]
 Report Name: [REDACTED]
 Funding/Grant Period: 10/01/2016 - 09/30/2020
 Report Period: 10/01/2019 - 09/30/2020

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 Original	Submitted	10/13/2020	Unsubmit Report Review	HTML Print Form <input type="button" value="Go"/>

Report Status History

Show entries

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Submitted	10/13/2020 12:39:43 PM	[REDACTED]	
Original	Certified	10/13/2020 11:58:42 AM	[REDACTED]	Signed as Authorized Official
Original	Saved -- Validated	10/13/2020 11:35:03 AM	[REDACTED]	

Figure 55: Report Status History screen with Submitted report status

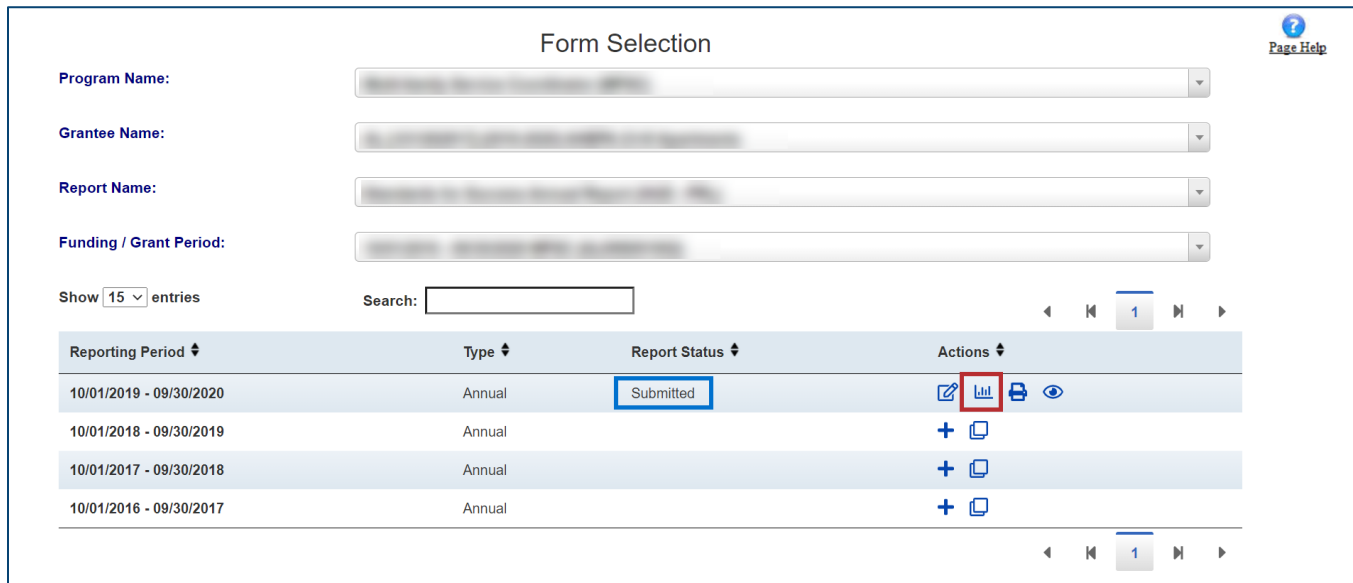
Unsubmit & Uncertify for Correction

UNSUBMIT A REPORT

Recipient users with permission to certify and submit can unsubmit a report if edits or changes to the report are needed after the report is saved, certified, and submitted. This option is not available if review of the report is in progress.

To unsubmit a report, perform the following:

1. On the “Form Selection” screen, locate a report in the *Submitted* report status and click the **Report Status** icon in the *Actions* column.



The screenshot shows the 'Form Selection' interface. At the top, there are four dropdown menus for 'Program Name', 'Grantee Name', 'Report Name', and 'Funding / Grant Period'. Below these is a 'Show 15 entries' dropdown and a 'Search:' text box. The main part of the screen is a table with the following columns: 'Reporting Period', 'Type', 'Report Status', and 'Actions'. The first row of the table shows a reporting period of '10/01/2019 - 09/30/2020', type 'Annual', and status 'Submitted'. The 'Submitted' status is highlighted with a blue box. In the 'Actions' column for this row, there are four icons: a pencil, a bar chart (highlighted with a red box), a printer, and an eye. Below the table, there are pagination controls showing '1' of 1 page.

Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual	Submitted	[Pencil] [Bar Chart] [Printer] [Eye]
10/01/2018 - 09/30/2019	Annual		[+] [Copy]
10/01/2017 - 09/30/2018	Annual		[+] [Copy]
10/01/2016 - 09/30/2017	Annual		[+] [Copy]

Figure 56: Form Selection screen with Report Status icon and Submitted status

- The “Report Status History” screen appears. Click the **Unsubmit Report** button.

Form Selection **Report Form Status**

Program Name: [Redacted]
 Grantee Name: [Redacted]
 Report Name: [Redacted]
 Funding/Grant Period: 10/01/2016 - 09/30/2020
 Report Period: 10/01/2019 - 09/30/2020

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 Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submitted	10/13/2020	Unsubmit Report Review	HTML Print Form Go

Report Status History

Show entries

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Submitted	10/13/2020 12:39:43 PM	[Redacted]	
Original	Certified	10/13/2020 11:58:42 AM	[Redacted]	Signed as Authorized Official
Original	Saved -- Validated	10/13/2020 11:35:03 AM	[Redacted]	

Figure 57: Report Status History screen with Unsubmit Report button

- A confirmation message appears. Click the **OK** button in the browser.

grantsolutions.gov says

This will officially withdraw your submission from [Redacted]. Depending on the date, you may not be able to re-submit without assistance from the Central Grants Office.

Do you want to continue to unsubmit?

OK Cancel

Figure 58: Unsubmit confirmation message with OK button

4. The *Report Status* becomes *Certified*.

Form Selection
Report Form Status

[Program Name:](#)
[Grantee Name:](#)
[Report Name:](#)
[Funding/Grant Period:](#) 10/01/2016 - 09/30/2020
[Report Period:](#) 10/01/2019 - 09/30/2020

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	10/13/2020	Submit Report <input type="text" value="10/13/2020"/>	HTML Print Form <input type="button" value="Go"/>

Show entries

Report Status History

Search:

Report Submissions:	Report Action:	Date/Time:	User Name:	Change (if known):
Original	Certified	10/13/2020 01:26:55 PM	<input type="text"/>	Unsubmitted for edit
Original	Submitted	10/13/2020 12:39:43 PM	<input type="text"/>	
Original	Certified	10/13/2020 11:58:42 AM	<input type="text"/>	Signed as Authorized Official

Figure 59: Report Status History screen with Certified report status

Note: A report must be uncertified before it can be edited.

UNCERTIFY A REPORT

Recipient users with permission to certify and submit can uncertify a certified (or unsubmitted) report if edits or changes to the report must occur. This option is only available if the report is unsubmitted.

To uncertify a report, perform the following:

1. On the “Form Selection” screen, locate a report in the *Certified* report status and click the **Edit** icon in the *Actions* column.

The screenshot shows the 'Form Selection' interface. At the top, there are four dropdown menus for 'Program Name', 'Grantee Name', 'Report Name', and 'Funding / Grant Period'. Below these is a 'Show 15 entries' dropdown and a 'Search:' text box. The main part of the screen is a table with the following columns: 'Reporting Period', 'Type', 'Report Status', and 'Actions'. The first row of the table has '10/01/2019 - 09/30/2020' in the Reporting Period column, 'Annual' in the Type column, 'Certified' in the Report Status column, and a set of icons in the Actions column. The 'Edit' icon (a pencil) in the Actions column of the first row is highlighted with a red box. Below the table, there are pagination controls showing '1' of 1 page.








Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual	Certified	   
10/01/2018 - 09/30/2019	Annual		+ 
10/01/2017 - 09/30/2018	Annual		+ 
10/01/2016 - 09/30/2017	Annual		+ 

Figure 60: Form Selection screen with Edit icon and Certified status

1. On the “Report Sections” screen, click the **Uncertify** button.

Report Sections

Program Name: [REDACTED]

Grantee Name: [REDACTED]

Report Name: [REDACTED]

Funding/Grant Period: 10/01/2016 - 09/30/2020

Report Period: 10/01/2019 - 09/30/2020

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:

- Print Section - Opens a new browser window with the report in a print-friendly version.
- View Section - Opens the form section in a read-only version.

[View Attachments](#)
[Uncertify](#)
[Submit](#)
[Print Full Report](#)

Show 30 entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: ▼ Go	Certified
Household Identifier #: [REDACTED]	Select Action: ▼ Go	Certified

Showing 1 to 2 of 2 entries Previous 1 Next

Figure 61: Report Sections screen with Uncertify button

2. A confirmation message appears. Click the **OK** button in the browser.

grantsolutions.gov says

Uncertify will remove all the signatures and the Certify status. Click OK to continue to Uncertify and return the form to a Saved status.

OK
Cancel

Figure 62: Uncertify confirmation message with OK button

The “Report Sections” screen reappears, and the *Section Status* of all sections becomes *Saved – Validated*.

Report Sections

Program Name: [REDACTED]

Grantee Name: [REDACTED]

Report Name: [REDACTED]

Funding/Grant Period: 10/01/2016 - 09/30/2020

Report Period: 10/01/2019 - 09/30/2020

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
Certify
Print Full Report

Show 30 entries Search:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: Go	Saved -- Validated
* Household Identifier #: [REDACTED]	Select Action: Go	Saved -- Validated

Figure 63: Report Sections screen with Saved - Validated section statuses

Edits can be made to the report using the **Edit Section** drop-down option in the *Perform Action* column and clicking the **Go** button.

Perform Action:

Select Action: ▼

Go

Select Action:

Clear Section Data

Edit Section

Print Section

Go

Figure 64: Perform Action column with Edit Section drop-down option with Go button

Revise a Report

Recipient users with Edit or Certify and Submit authority can create an editable copy of a report that is returned for correction. This copy is used for revision purposes.

To revise a report, perform the following:

1. On the “Form Selection” screen, locate a report in the *Submission Returned by CO* status and click the **Revise** icon in the *Actions* column.

The screenshot shows the 'Form Selection' screen in the OLDC Home interface. At the top, there are dropdown menus for 'Program Name', 'Grantee Name', and 'Report Name'. Below these are filters for 'Show 15 entries' and a 'Search' box. A table lists reports with columns for 'Reporting Period', 'Report Status', and 'Actions'. The report for '03/01/2020 - 06/30/2020' has a status of 'Submission Returned by CO' and a 'Revise' icon (a document with a circular arrow) highlighted in the Actions column. A 'Page Help' link is visible in the top right corner.

Reporting Period	Report Status	Actions
07/01/2021 - 09/30/2021		+
04/01/2021 - 06/30/2021		+
01/01/2021 - 03/31/2021		+
10/01/2020 - 12/31/2020		+
07/01/2020 - 09/30/2020		+
03/01/2020 - 06/30/2020	Submission Returned by CO	Revise (document with circular arrow icon)

Figure 65: Form Selection screen with Revise icon and Submission Returned by CO status

2. A new copy of the form with the status *Initialized (Revision # [number of the revision])* is created, and an **Edit** icon appears in the *Actions* column. The data from the previous form is also copied to the new copy.





Report Status ▴ ▾	Actions ▴ ▾
	+
	+
	+
	+
	+
Initialized (Revision #1)	   

Figure 66: Initialized (Revision # [number of the revision]) status and Edit icon

3. Users with permission to edit can edit, save, and validate revisions.

Note: The same rules for the original copy of the report apply to the revised version. The revised version also has the same submission due date.

Clone a Report

Recipient users with Edit or Certify and Submit authority can clone a report. When a *Household Identifier* section of a report is cloned, only fields 1-11, 13, 14, and 107-110 are cloned to the cloned report. Only a report that is submitted for review can be cloned.

To clone a report, perform the following:

1. On the “Form Selection” screen, locate the desired report and click the **Clone Report** icon in the *Actions* column.

On-Line Data Collection Name: Test AccttHUD Help / FAQ
Last Login: 09/21/2020 18:08:45 PM End OLDC

OLDC Home Form Selection

Form Selection [Page Help](#)

Program Name:

Grantee Name:

Report Name:

Funding / Grant Period:

Show entries Search:











Reporting Period	Type	Report Status	Actions
10/01/2019 - 09/30/2020	Annual		   
10/01/2018 - 09/30/2019	Annual	Initialized	  
10/01/2017 - 09/30/2018	Annual	Submission in Review by RO	  

Figure 67: Form Selection screen with results table and Clone Report icon

- The “Clone Report” window appears. Select a **Funding/Grant Period** from the *Funding/Grant Period* drop-down, select the **reporting period(s)** from the *Reporting Period* column using the radio buttons, and click the **Clone** button.

Clone Report

×

Choose the report period in this screen to clone to the report period selected in the previous screen.

Step 1:

Funding/Grant Period

Step 2: [Period Covered By This Report:](#)

Show

15

 entries

Search:

◀

⏮

1

⏭

▶

Reporting Period	Type	Report Status
<input type="radio"/> 10/01/2019 - 09/30/2020	Annual	
<input type="radio"/> 10/01/2018 - 09/30/2019	Annual	Initialized
<input checked="" type="radio"/> 10/01/2017 - 09/30/2018	Annual	Submission in Review by RO

◀

⏮

1

⏭

▶

Close

Clone

[Web Accessibility](#) | [Privacy and Security Notice](#) | [Freedom of Information Act](#) | [Disclaimers](#) | [Feedback](#)

Figure 68: Clone Report window with Funding/Grant Period drop-down, Reporting Period radio buttons, and Clone button

3. The “Report Sections” screen appears with the cloned report.

Report Sections

[Program Name:](#) [Redacted]
[Grantee Name:](#) [Redacted]
[Report Name:](#) [Redacted]
[Funding/Grant Period:](#) 10/01/2017 - 09/30/2020 [Redacted]
[Report Period:](#) 10/01/2019 - 09/30/2020

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

Show 30 entries
Search:

<u>Section Name:</u>	<u>Perform Action:</u>	<u>Section Status:</u>
Cover Page	<div style="display: flex; align-items: center;"> Select Action: ▼ Go </div>	Initialized
* Household Identifier #: [Redacted] & Personal Identifier #: a	<div style="display: flex; align-items: center;"> Select Action: ▼ Go </div>	Initialized

Figure 69: Report Sections screen with cloned report

Frequently Asked Questions

CAN I EXTEND THE REPORTING PERIOD OF A REPORT?

Program Office directives dictate the length of a reporting period. The reporting period of a report can only be extended by contacting the Program Office or the HUD Help Desk to update the reporting period accordingly. If the reporting period must be updated, a new version of the report must be created with the new reporting period timeframe. Please contact the HUD Help Desk by email at AskGMO@hud.gov.

CAN I ADD A PROPERTY SO THAT IT APPEARS IN THE GRANTEE NAME DROP-DOWN LIST ON THE FORM SELECTION SCREEN?

The Program Office assigns properties to each user account. Additional properties can only be included in the *Grantee Name* drop-down on the “Form Selection” screen by contacting the Program Office to update the list accordingly. Please contact the Program Office to ensure the property appears in the drop-down.