On-Line Data Collection
HUD User Guide

October 2020

Table of Contents

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:
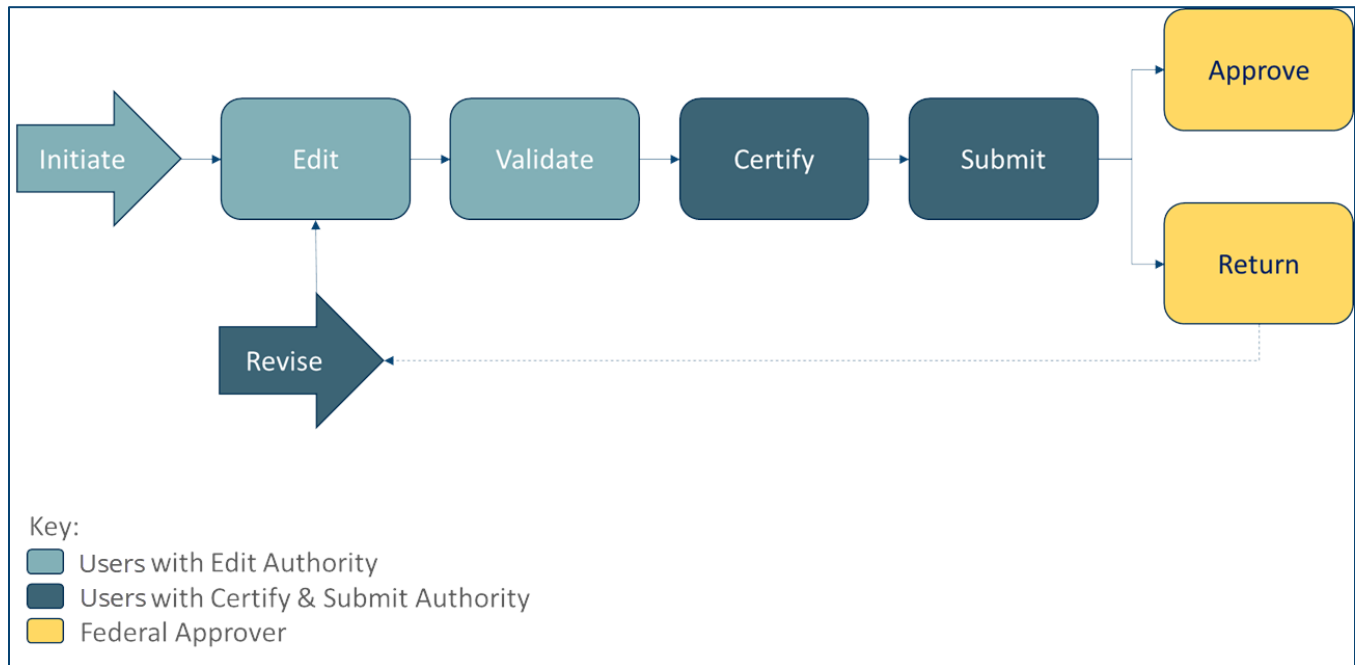

Figure 1: Approval workflow

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 Full Report	Print Latest Version (HTML)	Create a printable copy of the report.
Previous Section	Previous Section	Navigate to the previous section of the report.
Save	Save	Save the section or sub-section currently open.
Validate	Validate	Validate the section or sub-section currently open.
Next Section	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 *Delete* 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.
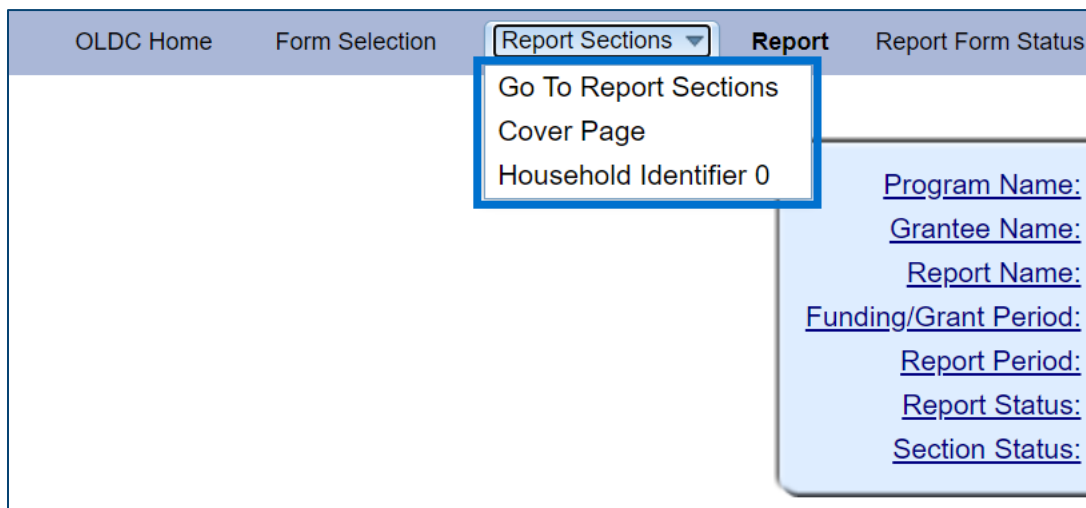

Figure 2: Report Sections drop-down

REPORT PROGRESS BAR

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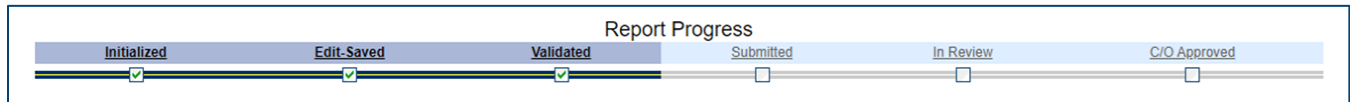

Figure 3: Report Progress Bar

Login

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

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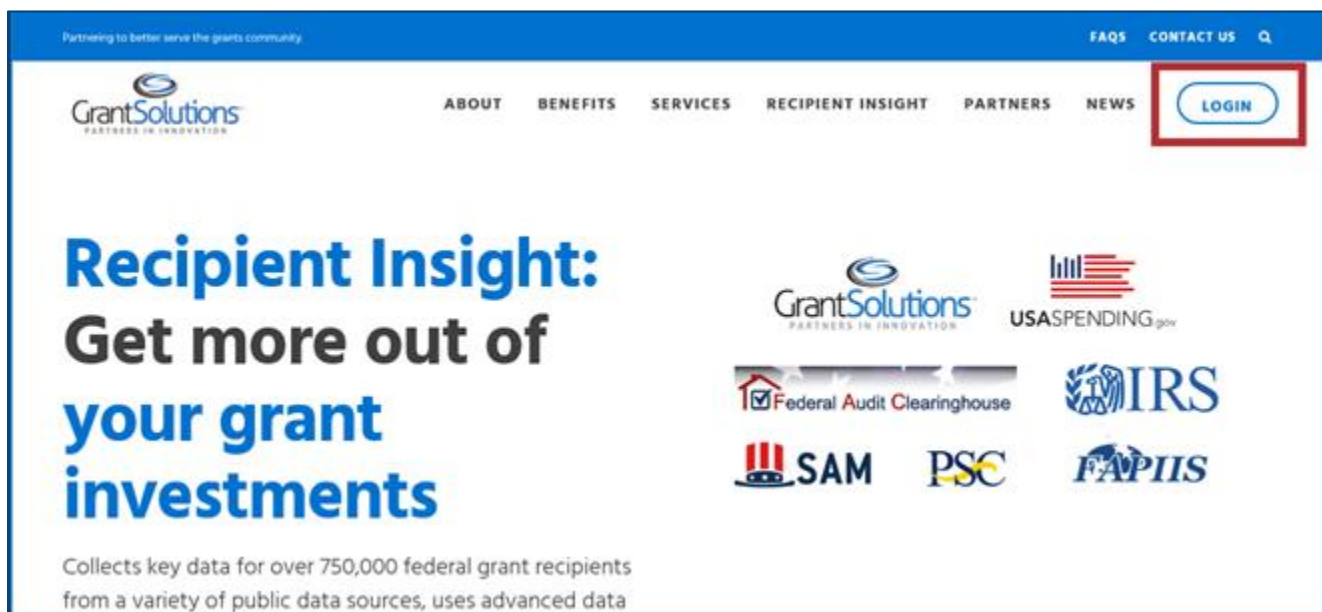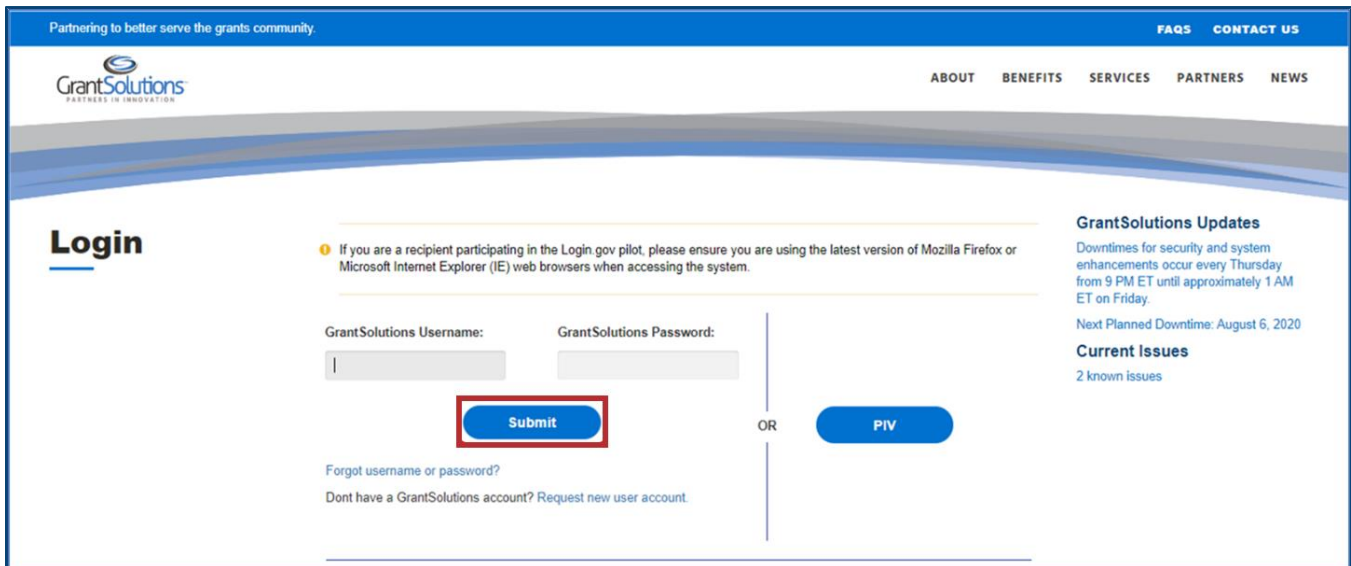2. Click the **Login** button in the top right corner.

Figure 4: GrantSolutions public website
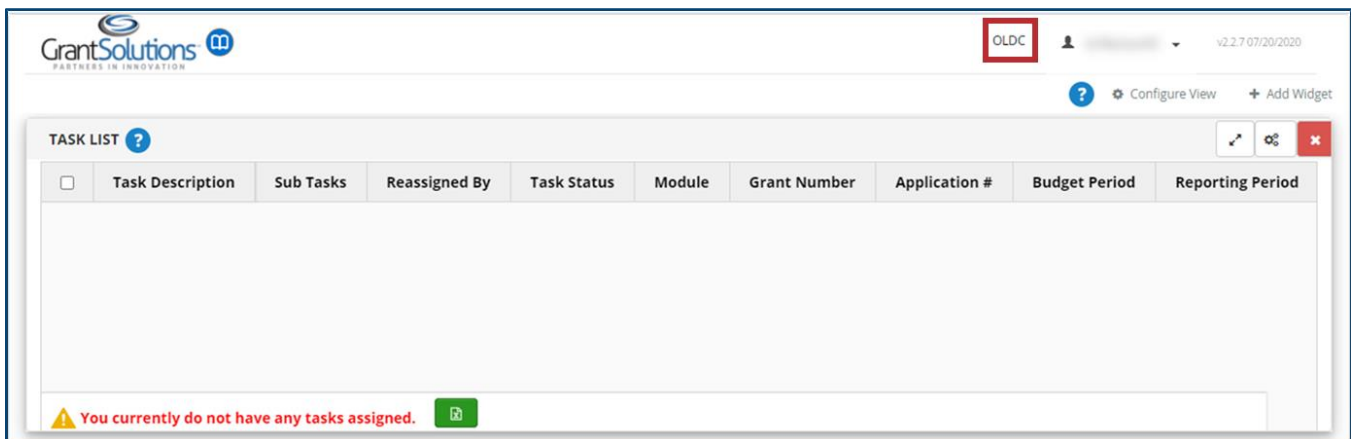
3. Enter a **username** and **password** and click the **Submit** button.

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.

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.
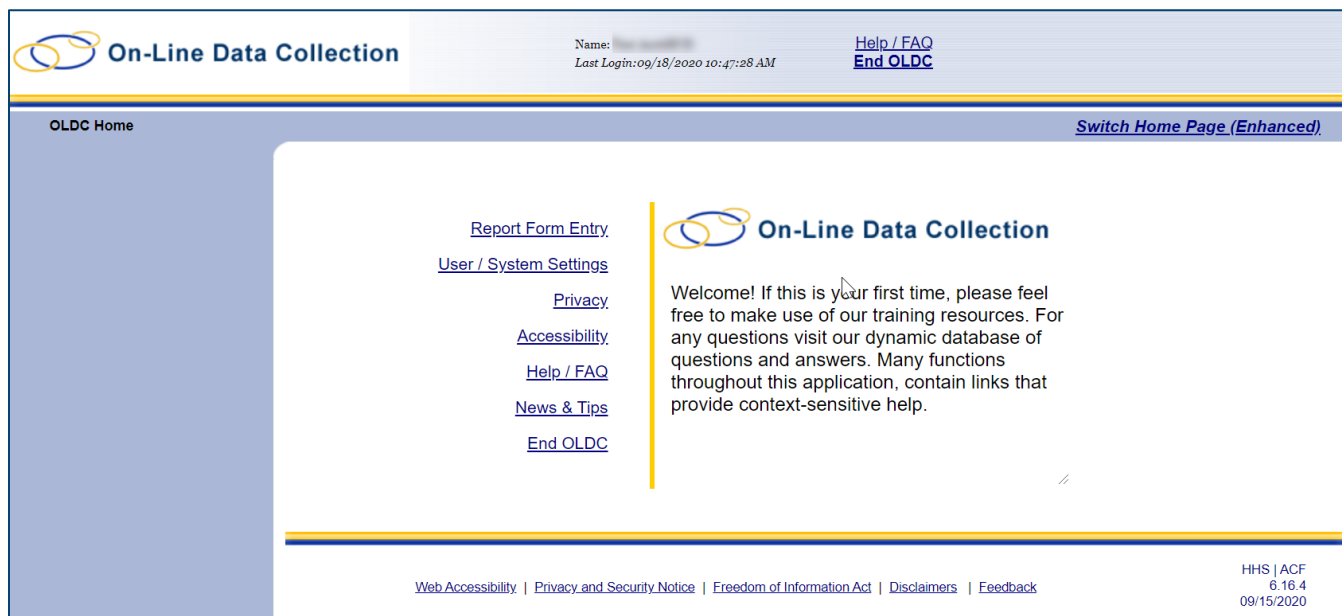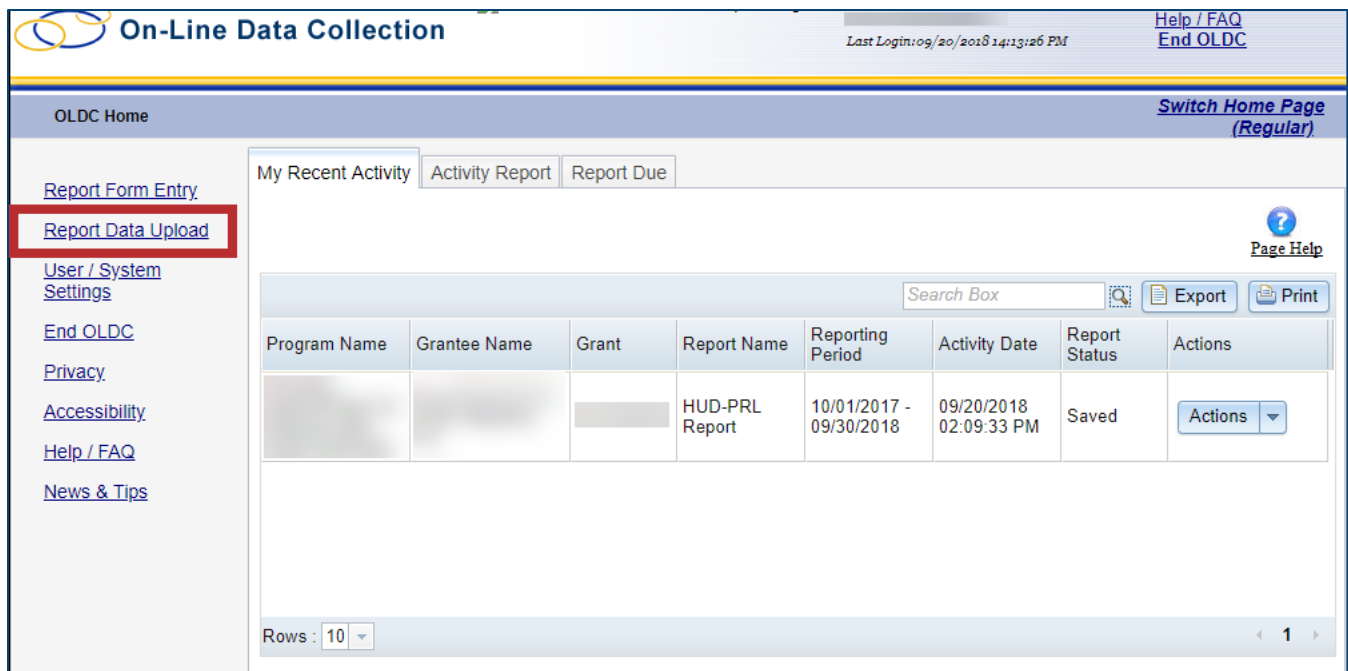

Figure 7: OLDC Home screen

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.

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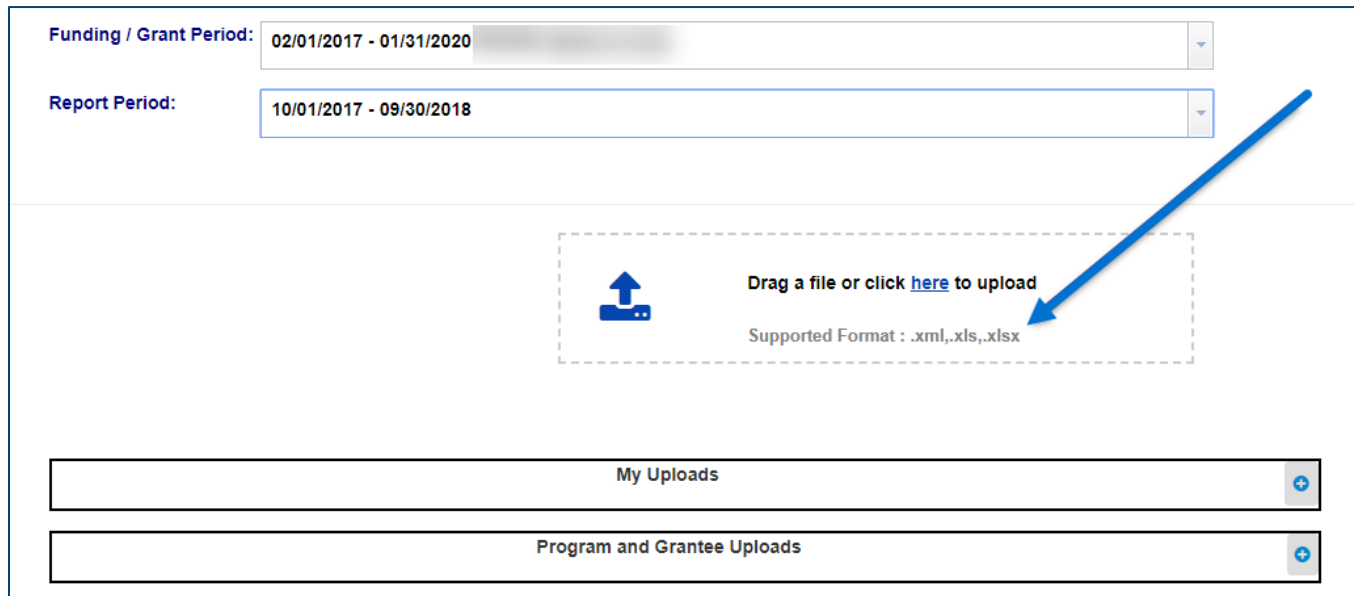4. Select a **Report Name** from the third drop-down.

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.

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.
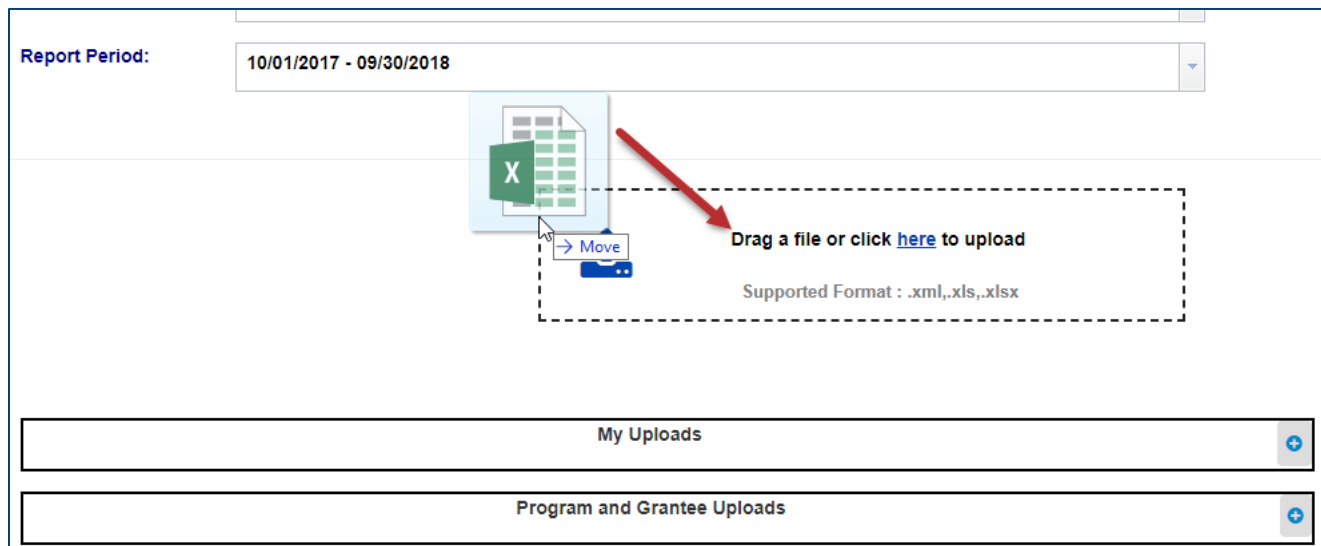
Figure 11: Report Data Upload screen with File Upload box

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.

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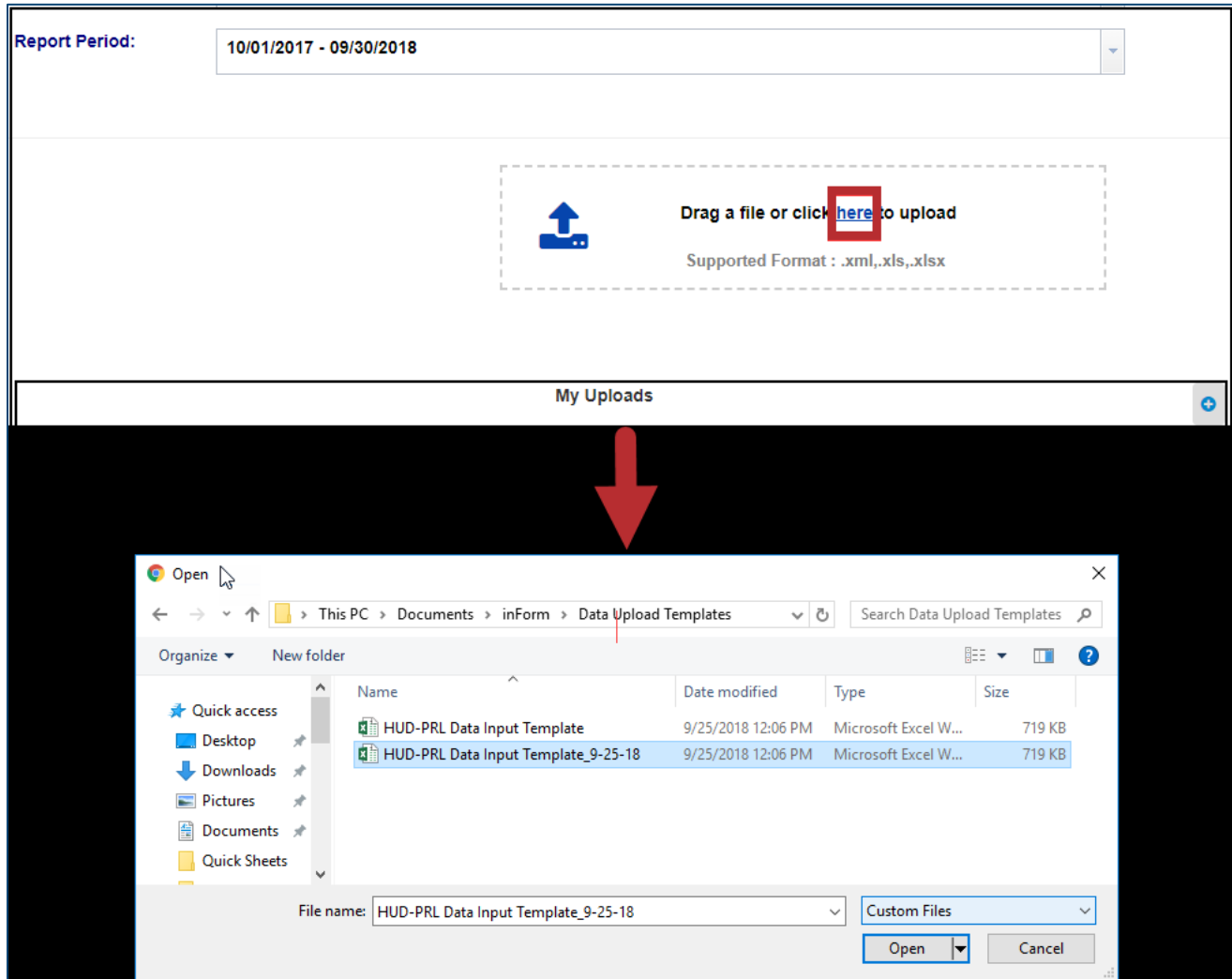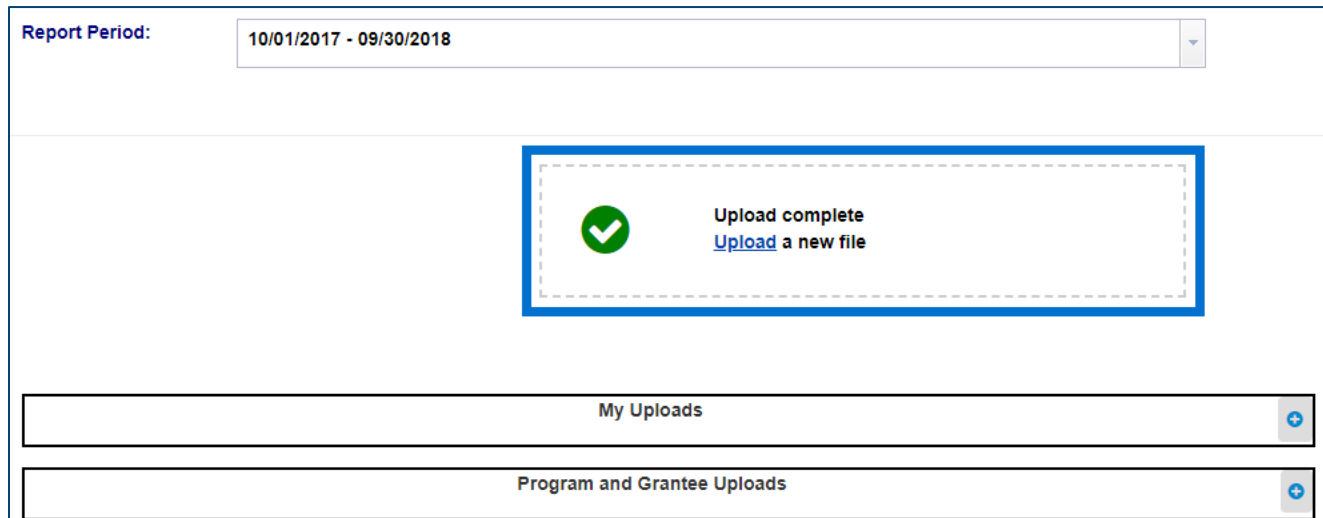
Figure 13: Report Data Upload screen with here link and file upload

9. The "Upload complete" message appears. A link is available to upload another file if needed.
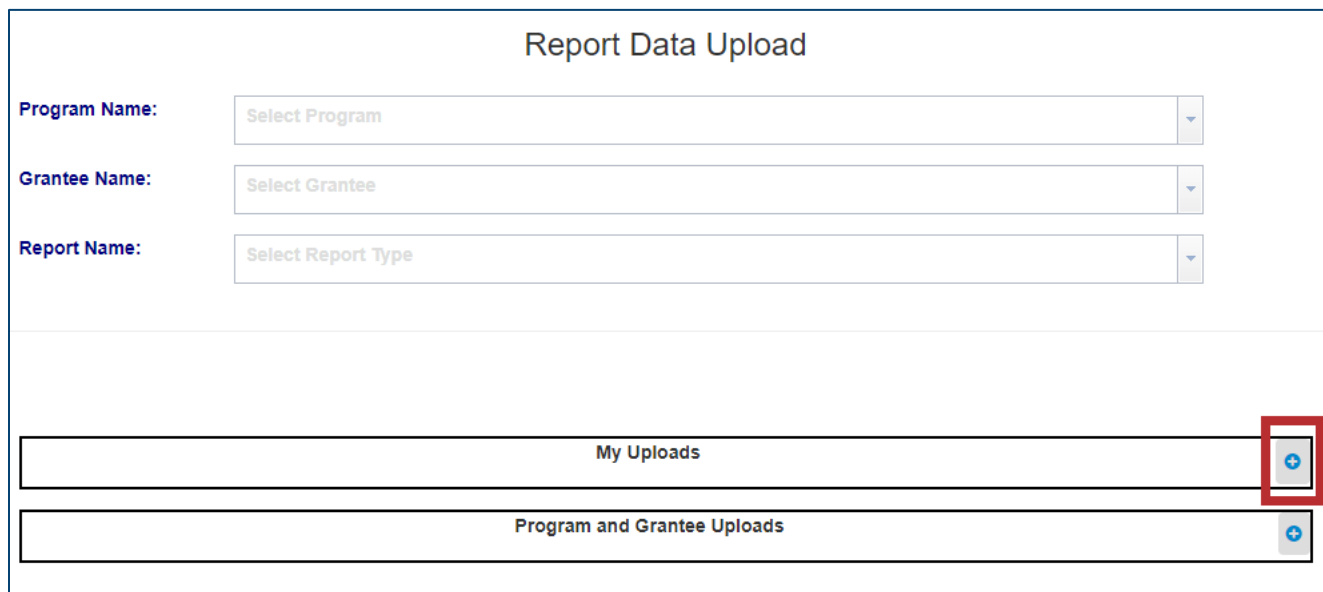
Figure 14: Report Data Upload screen with Upload complete message and Upload link

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.

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.

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

The row expands, and upload details are viewable.
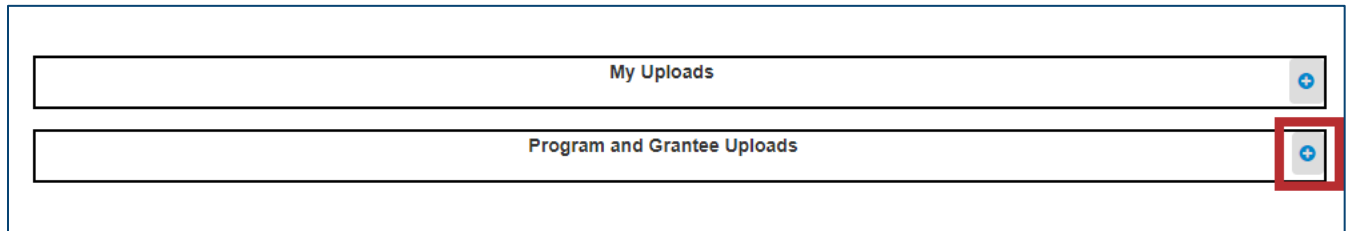
Figure 17: Report Data Upload screen with upload details

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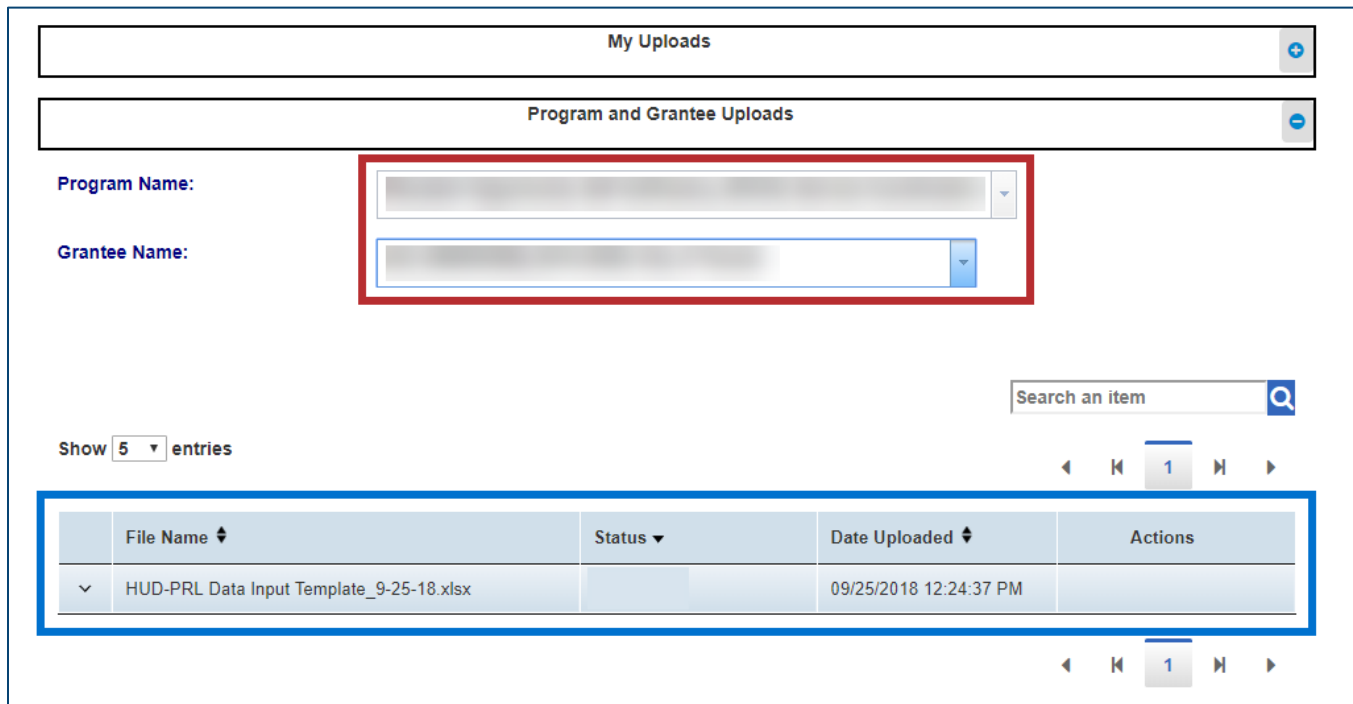
Click the **blue plus sign** to expand the *Program and Grantee Uploads* bar and filter uploaded files by Program Name and Grantee Name.

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.

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.

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.
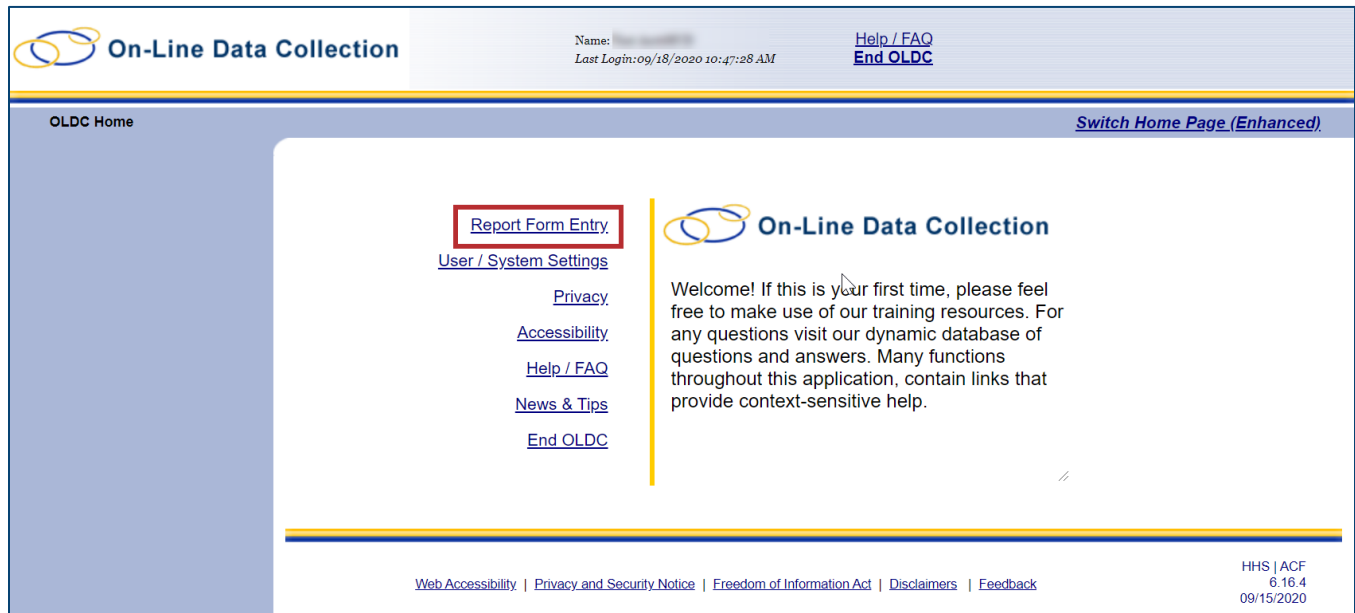
Figure 21: OLDC Home screen with Report Form Entry link

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.

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

4. 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:
Grantee Name:
Report Name:
Funding/Grant Period: 10/01/2016 - 09/30/2020
Report Period: 10/01/2019 - 09/30/2020

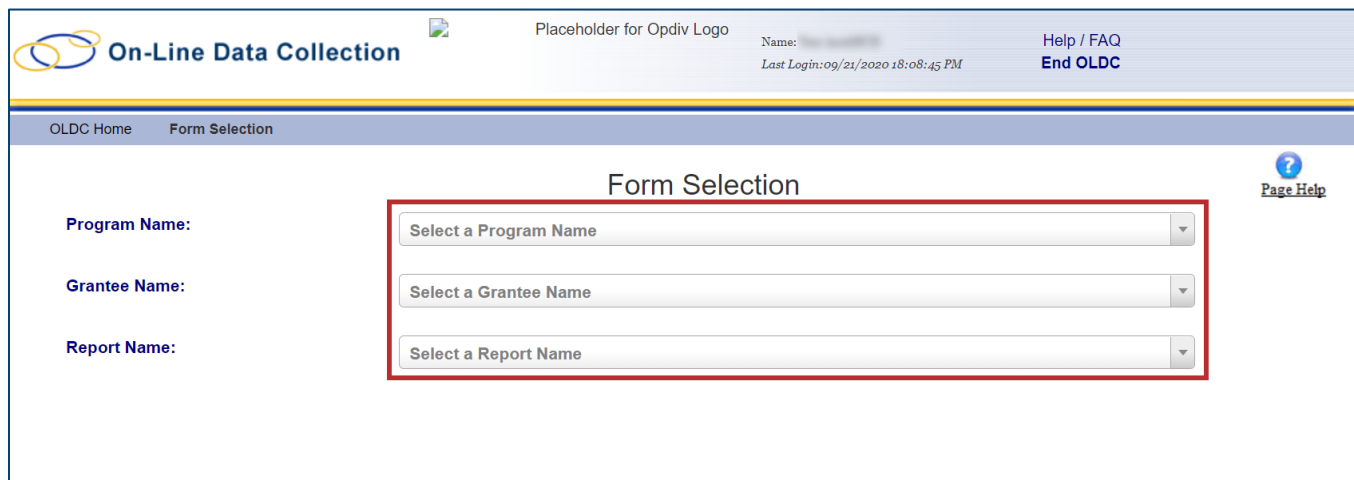This table displays the sections of the report form and the status of each. Return to this screen to Validate, Certify, or Submit.

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:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: [Go]	Initialized
* Household Identifier 0	Select Action: [Go]	Initialized

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:

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: ▼ **Go** Select Action: Clear Section Data Edit Section Print Section	Initialized
* **Household Identifier** 0	**Go**	Initialized

Showing 1 to 2 of 2 entries   Previous 1 Next

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

2. The "Cover Page" screen appears with organizational information.

Figure 26: Cover Page screen

3. 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.

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

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

Figure 31: Create a new section message

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

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.

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

2. The "Household Identifier" screen appears with household information.

Figure 34: Household Identifier screen

3. 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 ⌄	
7. Ethnicity Code	Not Hispanic/Latino ⌄	
8. Race Code	American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Mixed Race Information not collected	
9. Head of Household Code	Yes ⌄	
10. Residence Census Tract		**Information Not Collected** ☑
11. Veteran Status Code	No ⌄	
12. Time in Subsidized Housing Number		**Information Not Collected** ☑
13. Disability Status Code	No, individual indicates no disability as ⌄	
14. Disability Category Code	N/A ⌄	
15. Disability Requires Assistance Code	N/A ⌄	
18. Supplemental Nutrition Assistance Program (SNAP) Code	No ⌄	
19. Temporary Assistance to Needy Families (TANF) Code	No ⌄	
20. Supplemental Security Income (SSI) Code	No ⌄	
21. Social Security Disability Insurance (SSDI) Code	No ⌄	
23. HIV/AIDS Service Code	Yes ⌄	
	23. Number of Times: 2	
25. Primary Health Care Provider Code	No ⌄	

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** ☑
36. Instrumental Activities of Daily Living (IADL) Count		**Information Not Collected** ☑
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 scho
60. Household Annual Gross Income Amount	$ 100,000	**Information Not Collected** ☐
66. Intermediate Housing Status Code	N/A
68. Household Housing Cost Amount	$	**Information Not Collected** ☑

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	$ [ ]	**Information Not Collected** ☑
72. ESL Class Service Code	Yes ⌄	
	72. Number of Times: [3]	
79. Fair Housing and Civil Rights Assistance Service Code	N/A ⌄	
80. Tax Preparation Service Code	N/A ⌄	
81. Earned Income Tax Credit Recipient Code	N/A ⌄	
82. Financial Account Creation Code	N/A ⌄	
83. Financial Account Creation Service Code	N/A ⌄	
84. Legal Assistance Service Code	Yes ⌄	
	84. Number of Times: [5]	
85. Legal Assistance Type Service Code	N/A ⌄	
86. Financial Education Service Code	N/A ⌄	
87. Pre-Housing Counseling Service Code	N/A ⌄	
88. Post-Housing Counseling Service Code	N/A ⌄	
89. Food and Nutrition Service Code	N/A ⌄	
90. Conflict Resolution Service Code	N/A ⌄	
92. Translation/Interpretation Service Code	N/A ⌄	
93. Housing Retention Service Code	N/A ⌄	
94. Household Skills/Life Skills Service Code	N/A ⌄	
95. Needs Assessment Service Code	N/A ⌄	

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 ☑
109. Service Start Date	6/1/2020	Information Not Collected ☐
110. Service End Date	9/1/2020	Information Not Collected ☐
iREMS Number:		

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*.
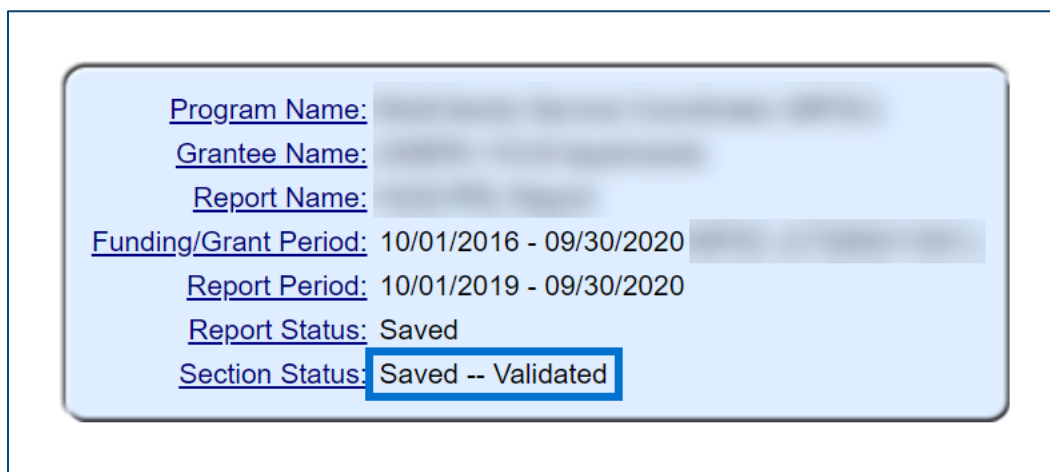
Program Name:
Grantee Name:
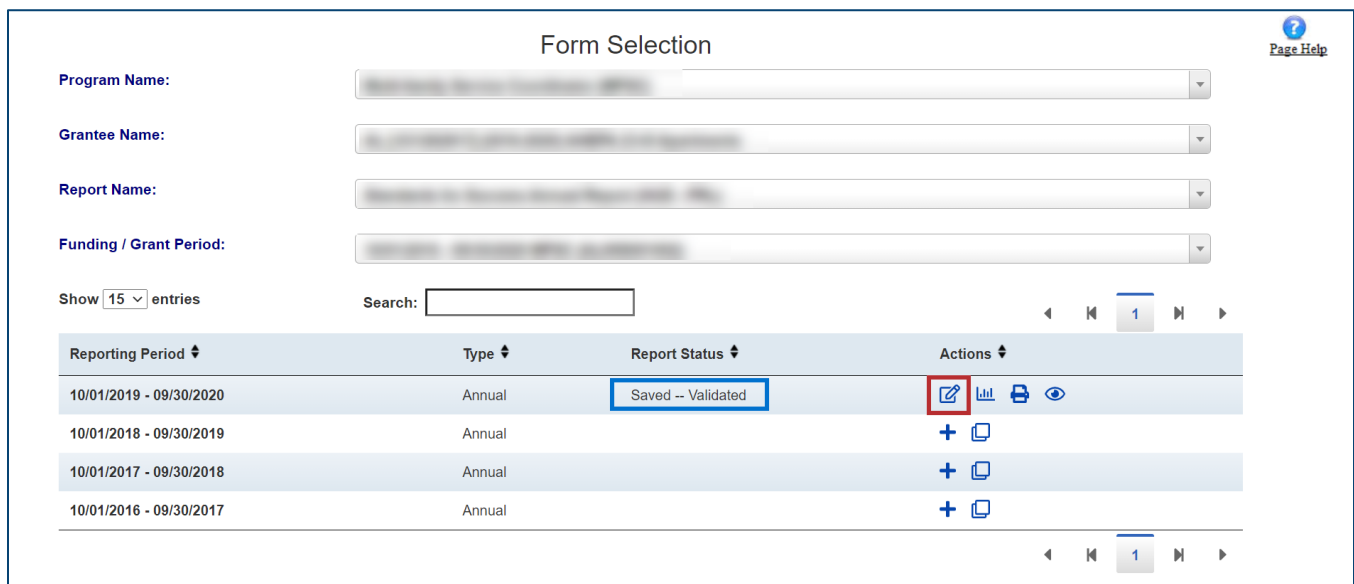Report Name:
Funding/Grant Period: 10/01/2016 - 09/30/2020
Report Period: 10/01/2019 - 09/30/2020
Report Status: Saved
Section Status: Saved -- Validated

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.

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.

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.

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 30 ✔ entries   Search: [   ]

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

Showing 1 to 2 of 2 entries   Previous [1] 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 30 ✔ entries   Search: [   ]

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

Showing 1 to 2 of 2 entries   Previous [1] Next

| | View/Add Attachments | Validate | Certify | Print Full Report | |

Figure 46: Report Sections screen with Certify button

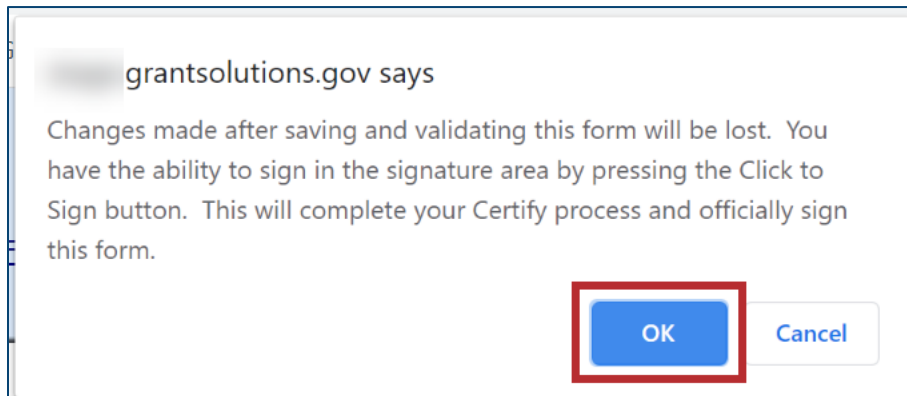5. A confirmation message appears in a new window. Click the **OK** button in the browser.

Figure 47: Certify confirmation message with OK button

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

Figure 48: Cover Page screen with Click to Sign button

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

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.

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.

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:
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:

- 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 #:	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

5. 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.

grantsolutions.gov says

We have received your report. This page shows all reports we have received along with attachments.

OK

Figure 54: Submission received message with OK button

The *Report Status* becomes *Submitted*.

| 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:
View Original	Submitted	10/13/2020	Unsubmit Report Review	HTML Print Form ⌄ Go

Report Status History

Show 10 ⌄ entries   Search:

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

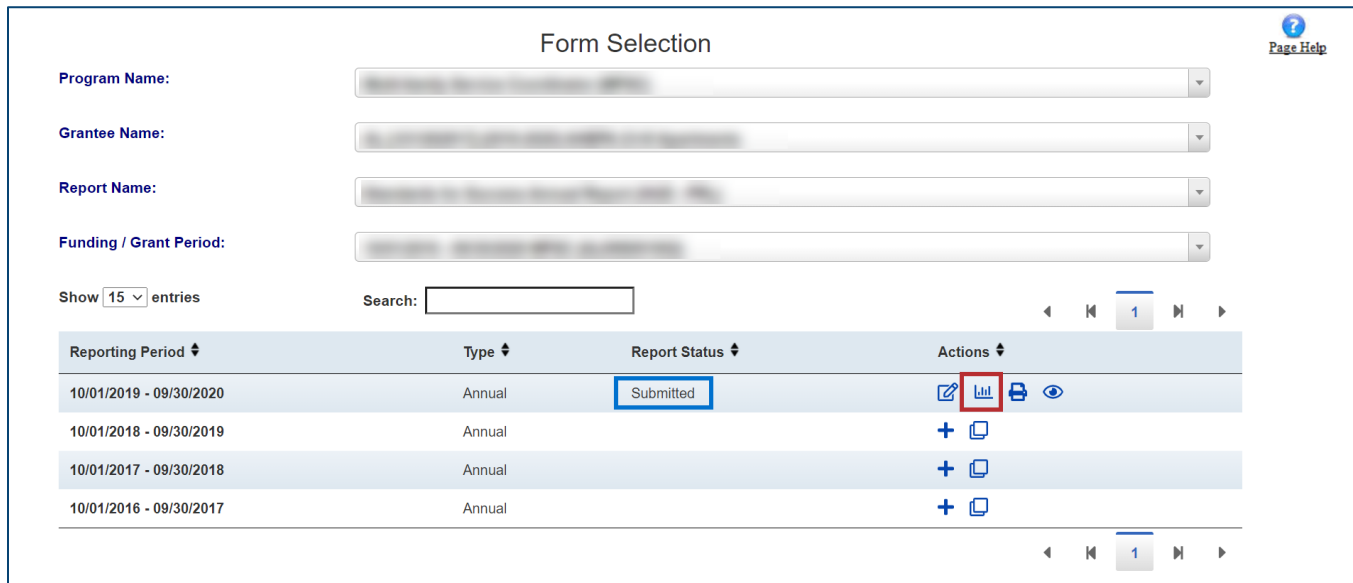*Figure 55: Report Status History screen with Submitted report status*

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.

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

2. The "Report Status History" screen appears. Click the **Unsubmit Report** button.

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

Figure 58: Unsubmit confirmation message with OK button

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

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.

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:
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:

- 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 #:	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:
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   Certify   Print Full Report

Show 30 entries   Search:

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

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.

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.

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.

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

2. 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.

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:	
Grantee Name:	
Report Name:	
Funding/Grant Period:	10/01/2017 - 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: [_____]

Section Name:	Perform Action:	Section Status:
Cover Page	Select Action: ⌄ Go	**Initialized**
* Household Identifier **#: _____ & Personal Identifier #: a**	Select Action: ⌄ Go	**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.