

Completing the *FY24 Household Report:* Short Form Version

LIHEAP WEBINAR HOSTED BY THE OFFICE OF COMMUNITY SERVICES (OCS) IN THE ADMINISTRATION FOR CHILDREN AND FAMILIES (ACF) PRESENTED BY APPRISE UNDER CONTRACT TO OCS

OCTOBER 31, 2024

WELCOME:

MEGAN MEADOWS (OCS)

PRESENTERS:

MELISSA TORGERSON (VERVE ASSOCIATES)

DAN BAUSCH (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Webinar Overview

- **Purpose of this Webinar**

- To review the key requirements for completing the federal Fiscal Year (FY) 24 *Household Report – Short Form*.
- To explain changes made to the report for FY24.
- To review the data you need to prepare the report.
- To review the process for submitting and updating the report.

- **Audience for this Webinar**

- LIHEAP Tribal grant recipients and select Territory grant recipients.
- Staff that assist with completing the report.

Presenter(s):
Megan Meadows

Speakers

- Today's webinar is being conducted by APPRISE, a non-profit research institute that is contracted with ACF to provide LIHEAP training and technical assistance.
- APPRISE works with LIHEAP tribal and territory grant recipients by assisting with reviewing LIHEAP Quarterly Reports and providing one-on-one technical assistance for reporting or performance management.

Daniel Bausch

Senior Project Director – APPRISE

Melissa Torgerson

Owner – Verve Associates LLC



Presenter(s):
Megan Meadows

Webinar Overview

- **Structure of the Webinar**

- 60-minutes.
- **Slides available for download now** under “Handouts” in the GoToWebinar Sidebar.
- The webinar is being recorded and will be published on the ACF YouTube channel.
- Handouts includes key resources for you.

GoToWebinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.

The screenshot shows the GoToWebinar interface with the sidebar minimized. The sidebar contains three icons: a telephone, a document, and a hand. The main content area is divided into two sections: 'Audio' and 'Questions'. The 'Audio' section shows options for 'Computer audio' and 'Phone call', along with dialing information: 'Dial: +1 (562) 247-8422', 'Access Code: 978-261-249 #', and 'Audio PIN: 45 #'. Below this is a 'Questions' section with a text input field containing the placeholder '[Enter a question for staff]' and a 'Send' button. A callout points to the input field with the text 'Enter text here to ask a question.' Another callout points to the telephone icon in the sidebar with the text 'Click this button to expand sidebar.' A third callout points to the minimized sidebar with the text 'If the sidebar is minimized, it will look like this:'. At the bottom of the interface, there is a 'Test' section with 'Webinar ID: 619-143-667' and the GoToWebinar logo.

Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.

Presenter(s):
Melissa Torgerson

Presentation Outline

Overview of the Report	Slide 9
What's New for FY24 Reporting	Slide 15
Data Needed to Complete the Report	Slide 19
Key Points for Accurate Reporting	Slide 23
Reporting Guidance for Section I	Slide 28
Reporting Guidance for Sections II to VI (Demographic Items)	Slide 32
Final Reminders	Slide 40
Extra Slides for using OLDC	Slide 51

LIHEAP Federal Reports

Upcoming Schedule

Report:	Due Date:	Focus of Report:
Model Plan FY25	9/03/2024	Application and plans for the FY
Quarterly Report (Quarter 4 of FY24)	10/31/2024	Summary of activity in the last quarter
Household Report (FY24)	9/18/2024 (Est.) 12/31/2024 (Final)	Households served in the past FY
Carryover and Reallotment Report (FY24)	8/9/2024 (Est.) 12/31/2024 (Final)	Funds being carried over or returned
SF-425	Likely 12/31/2024	Federal financial reporting

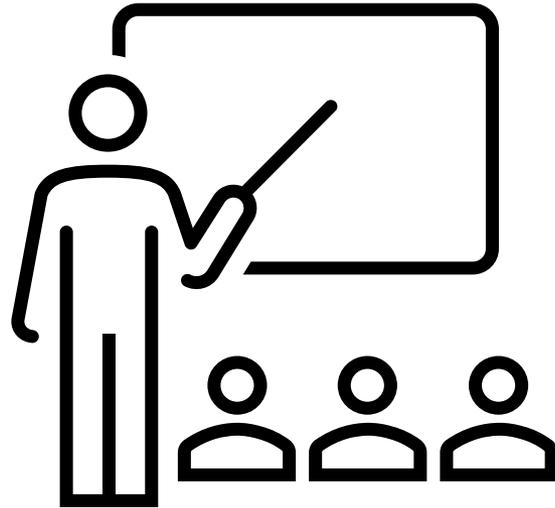
Audience Poll Question #1

How prepared do you think your team is for completing the final *FY24 LIHEAP Household Report – Short Form* due in December?

Please select one:

- **Not at all prepared** (i.e. haven't turned attention to this)
- **A little prepared** (i.e. aware, but haven't planned yet)
- **Mostly prepared** (i.e. planning and working out nuances)
- **Very prepared** (i.e. working on it and understand it)

Overview of
the
Household
Report
Short Form



Overview of the Household Report

Report Overview

- The *LIHEAP Household Report* is an annual report that has been submitted by grant recipients since the 1980s.
- There are two versions of the report.
 - *Long Form* – This is for state grant recipients and select larger territory grant recipients.
 - **Short Form** – This is for tribal grant recipients and select smaller territory grant recipients. Note, tribal grant recipients that were approved under Public Law 477 for LIHEAP integration beginning October 1, 2023 (FY24) are not required to submit the Household Report Short Form.

Presenter(s):
Dan Bausch

Overview of the Household Report

History & Purpose of Short Form

What the report collects

- There are two main types of data that the Short Form collects:
 1. Counts of households that received each type of LIHEAP assistance in the prior fiscal year.
 2. Demographic information on who received LIHEAP assistance in the prior fiscal year (recently added in FY23).

Overview of the Household Report

History & Purpose of Short Form

Why is this information collected?

- The information you report is used to...
 - **Track** how many households are receiving different types of LIHEAP assistance.
 - **Document** the demographic characteristics of who receives LIHEAP assistance.
 - **Respond** to Congressional and White House inquiries about LIHEAP.
 - **Communicate** to the public about LIHEAP.

Based on the submitted FY23 Household Reports, tribal grant recipients provided more than 33,000 households with heating assistance in FY23.

Presenter(s):
Dan Bausch

Overview of the Household Report *History & Purpose of Short Form*

Why is this information collected?

- More broadly, the data from this report ...
 - Provides a critical source of information for **understanding and characterizing** your programs.
 - Can help provide you with insights to **improve** program performance and make informed decisions.

Overview of the Household Report

Relation to Other Reports

Starting Point

During the Fiscal Year

After the Fiscal Year Ends

What's New for FY24 Reporting



What's New for FY24 Reporting

Report Announcements and Due Date

- **Report Announcement** - On August 29th, 2024, OCS published an Action Transmittal with the instructions and due date for the FY24 report (the AT and instructions are included as handouts).
- **Due Date** –
 - The preliminary report with nonfinal or estimated data was due September 18.
 - The final report with non-estimated data is due **December 31**.
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

What's New for FY24 Reporting

Report Changes

Good news: There are no changes to the report lines or layout.

There is one change from last year:

- Last year, HHS added new sections to collect demographic data. Data on the primary applicant was required, but data on all household members and whether the household owned or rented was optional for FY23 reporting.
- HHS announced prior to the FY23 report that the optional sections would be mandatory for FY24 reporting. This was reviewed during training last year.
- **As planned, the demographic sections that were optional in FY23 are now required for FY24. Grant recipients should complete these sections.**

What's New for FY24 Reporting

Resources to Assist With Completing the Report

Because the due date is December 31 for final data, it is important to plan your schedule and resources accordingly to submit by the due date.

- **Short Form Spreadsheet Template** – Included is an Excel spreadsheet showing the Short Form layout.
- **Check Before You Submit** - Included in the handouts is a “Check Before You Submit” document to help you confirm your report is ready to be submitted.
- **OLDC Guide** – This resource helps you to understand how to access OLDC using the GrantSolutions website.
- **Personalized Support:** Staff from APPRISE can answer questions about reporting prior to the due date for final data.

Data Needed to Complete the Report



Data Needed to Complete the Report

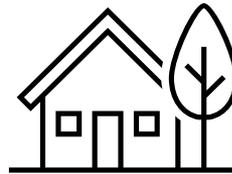
Household Level Information

For the Household Report, you must have the following data for each assisted household in FY24:

Type of Assistance Provided (e.g. Heating, Cooling, Weatherization)



Type of Funds Used (All Funding Types, Cares, ARPA)



Now required for FY24:
Housing Tenure of Primary Applicant (e.g. Own or Rent home)



Now required for FY24:
Demographics of all Household Members (Race, Ethnicity, Gender)



Demographics of the Primary Applicant (Race, Ethnicity, Gender)



Presenter(s):
Melissa Torgerson

Data Needed to Complete the Report

Process to Calculate Report Statistics

- The report asks for the number of assisted households across different assistance categories.
- To calculate these numbers, you need to:
 1. Have a dataset or spreadsheet with information on who was assisted in FY24 (October 1, 2023 to September 30, 2024).
 2. For each item in the Short form, you need to identify cases in the dataset that are relevant.
 3. You need to count up or sum the total number of relevant cases you identified and ensure you are counting correctly.

**Important: For most items in the Short Form, you count assisted households.

Data Needed to Complete the Report

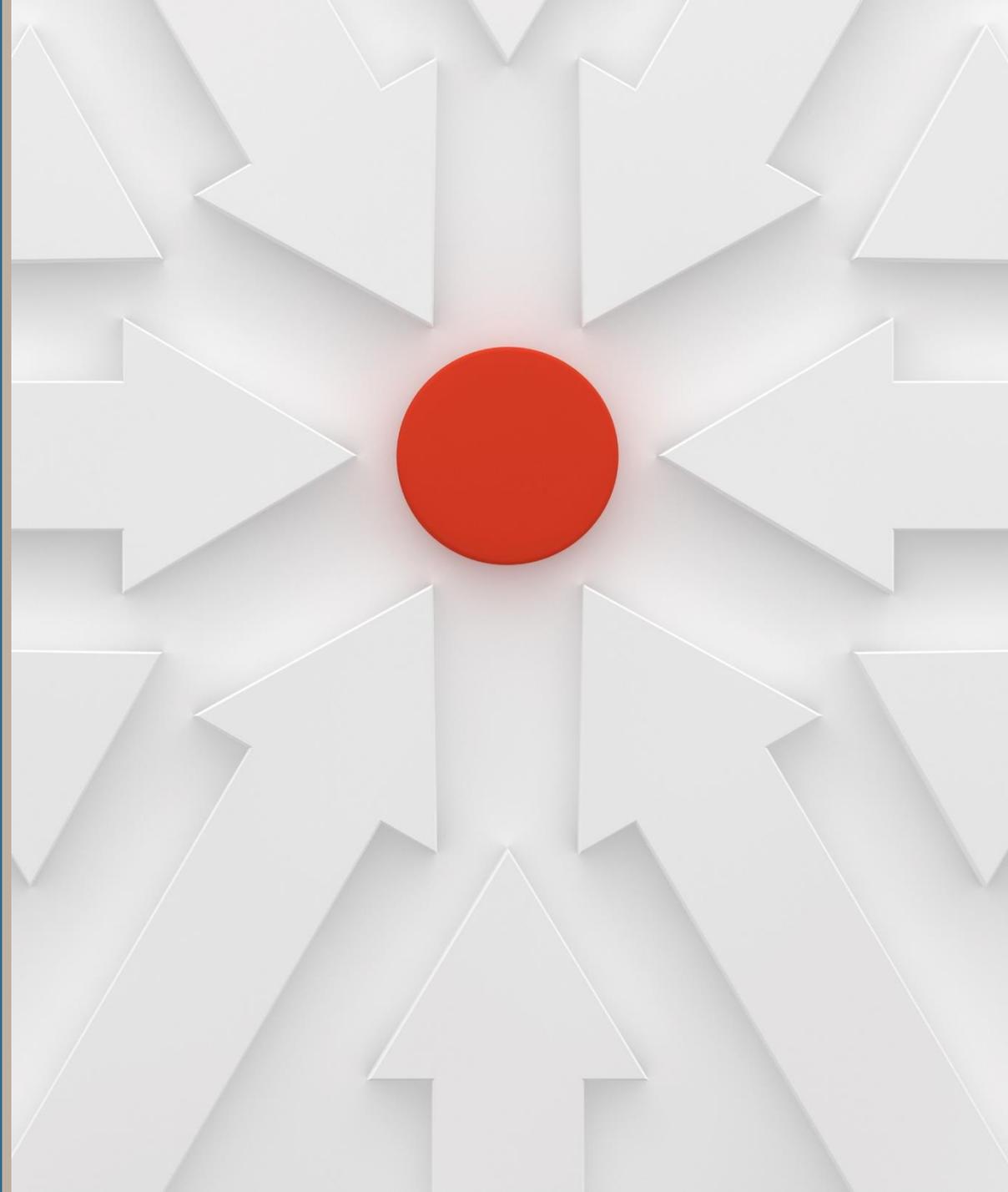
Example of Dataset Spreadsheet

ID	Primary Applicant Name	Benefit Type Received	Benefit Award Date	Funds Used for Benefit	Tenure	Primary Applicant	Race	Ethnicity	Gender
200034	[REDACTED]	Heating	11/2/2023	Regular	Rent with Utilities in Rent	Yes	American Indian or Alaska Native	Not Hispanic	Male
200035	[REDACTED]	Heating	11/2/2023	Regular	Rent with Utilities in Rent	No	Multi-race	Not Hispanic	Female
200036	[REDACTED]	Heating	11/2/2023	Regular	Rent with Utilities in Rent	No	Multi-race	Not Hispanic	Male
534353	[REDACTED]	Winter Crisis	1/24/2024	Regular	Own	Yes	Unkown/Not Reported	Hispanic	Female
534354	[REDACTED]	Winter Crisis	1/24/2024	Regular	Own	No	Unkown/Not Reported	Hispanic	Male

Presenter(s):
Melissa Torgerson



Key Reporting Points for Accurate Reporting



Key Points for Accurate Reporting

#1 – *Report Only for Those Assisted*

- For the Household Report, you must report how many households received assistance.
- You should include:
 - Households issued a benefit that was paid with federal LIHEAP funds.
 - Household who received equipment or weatherization services paid with federal LIHEAP funds.
- You should NOT include:
 - Households served entirely with other funds besides federal LIHEAP funds.
 - Households who applied but were denied assistance or did not receive a benefit.
 - Households who applied but were not assisted until after FY24.

Key Points for Accurate Reporting

#2 – *Report Only for Those Assisted during FY24*

- FY24 was from October 1, 2023 to September 30, 2024. You should report for this period, even if your program operates using a different period.
- Examples:
 - Household A received a heating benefit on November 5, 2023. → **Include**
 - Household B applied early for the season on September 25, 2024 and was issued a benefit on October 5, 2024 → **Exclude (not assisted during FY24)**

Key Points for Accurate Reporting

#3 – Report Each Household Only Once Per Line

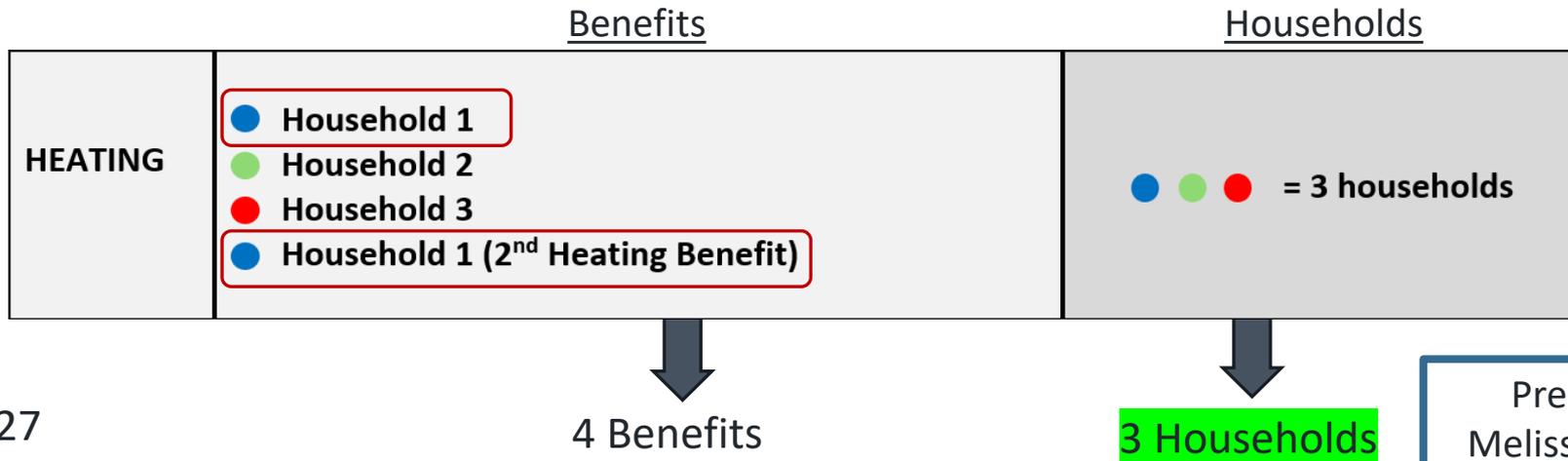
- Each line in Sections I – IV of the report is asking for the number of unique households served for the specified category.
- If your program allows you to provide the same type of assistance to households more than once per fiscal year, you need to count each household only once per line.
- It is correct to report the same household on multiple lines in the report since different lines ask about different items.
 - For example, if Household C received Heating and Crisis assistance, you include them in the counts for the applicable Heating Assistance Line and the applicable Crisis Assistance line.

Key Points for Accurate Reporting

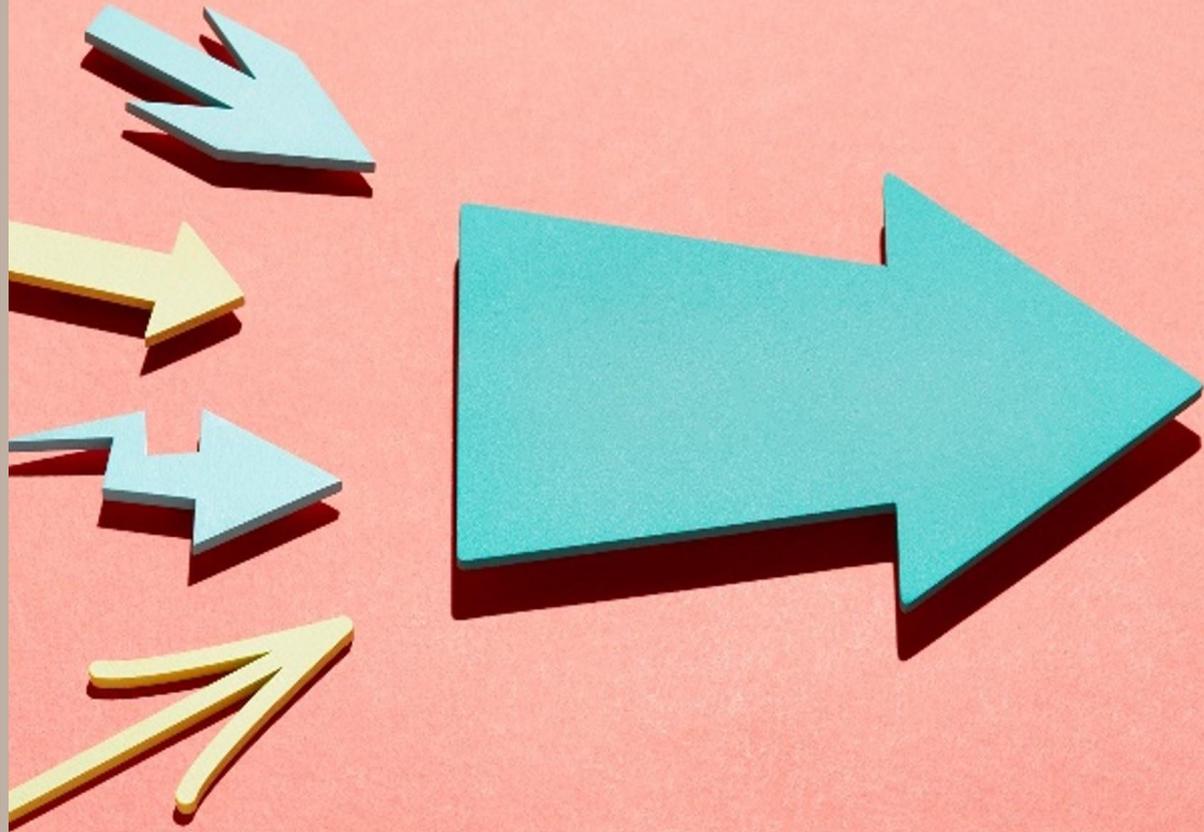
#3 – Report Each Household Only Once Per Line

•Example:

- Household 1 (blue circle below).
- They received a heating benefit in November 2023 and a second heating benefit March 2024.
- Although they received two heating benefits, you only want to count them once when reporting on the count of households who received Heating Assistance.



Reporting
Guidance for
Section I
(Type of
Assistance)



Reporting Guidance for Section I

Format

<u>I. Type of assistance</u>	<u>A. Number of assisted households</u>
1. Heating	0
2. Heating (Coronavirus Aid, Relief, and Economic Security Funding)	0
3. Heating (American Rescue Plan Act funding)	0
4. Heating (Reserved for other supplemental funding)	0
5. Cooling	0
6. Cooling (Coronavirus Aid, Relief, and Economic Security Funding)	0
7. Cooling (American Rescue Plan Act funding)	0
8. Cooling (Reserved for other supplemental funding)	0
9. Winter / year-round crisis	0
10. Winter / year-round crisis (Coronavirus Aid, Relief, and Economic Security Funding)	0
11. Winter / year-round crisis (American Rescue Plan Act funding)	0
12. Winter / year-round crisis (Reserved for other supplemental funding)	0
13. Summer crisis	0
14. Summer crisis (Coronavirus Aid, Relief, and Economic Security Funding)	0
15. Summer crisis (American Rescue Plan Act funding)	0
16. Summer crisis (Reserved for other supplemental funding)	0
17. Weatherization	0
18. Weatherization (Coronavirus Aid, Relief, and Economic Security Funding)	0
19. Weatherization (American Rescue Plan Act funding)	0
20. Weatherization (Reserved for other supplemental funding)	0
21. Other crisis assistance	0
22. Other crisis assistance (Coronavirus Aid, Relief, and Economic Security Funding)	0
23. Other crisis assistance (American Rescue Plan Act funding)	0
24. Other crisis assistance (Reserved for other supplemental funding)	0

Presenter(s):
Dan Bausch

Reporting Guidance for Section I

Types of Assistance

- Section I asks you to report using these assistance types:
 - Heating Assistance
 - Cooling Assistance
 - Winter or Year-Round Crisis Assistance
 - Summer Crisis Assistance
 - Weatherization
 - Other Crisis Assistance
- All households that were assisted with a benefit to help with energy bills/purchases, weatherization, or equipment services paid with federal LIHEAP dollars should be reported in one of the categories.
- “Other Crisis Assistance” can be used to report on households who received separate emergency assistance outside of your traditional crisis assistance. This may include equipment repair and replacement or other emergency assistance that you wish to distinguish.
- If you are not sure how to categorize a type of assistance you provided, refer to your Model Plan or contact your DEA Program Specialist.

Reporting Guidance for Section I

Reporting Lines for Each Type of Assistance

•For each type of assistance, there are several lines.



- **First Line** – Report on the *total number of households assisted regardless of funding source*.
- **Second Line** – Submit data on *the subset of households* from the first line that were assisted with LIHEAP CARES Act funding. This includes any households whose assistance was *fully or partially* funded by CARES dollars.
- **Third Line** - Submit data on *the subset of households* that were assisted with LIHEAP ARP Act funding. This includes any households whose assistance was *fully or partially* funded by ARP dollars.
- **Fourth Line** – This is a reserved line NOT applicable for FY24.
- **Key Takeaway** – All grant recipients should fill in the first line if they provided a type of assistance. If any older CARES or ARP funds were still expended for benefits in FY24, the second and/or third line may also be applicable.

Reporting
Guidance for
Sections II to VI
(Demographic
Items)



Reporting Guidance for Demographic Items

Overview

- Beginning last year for FY23, the Household Report included sections to report **demographic information** on race/ethnicity, gender, and housing tenure type.
- These are reported in Sections II to VI of the report.
- These have been added by HHS to help better understand the composition of households assisted by LIHEAP.
- Some sections were optional in FY23. All sections are now required.
- Recognizing the diversity in demographic categories and reporting approaches grant recipients may use, the demographic items include an “Other” category and/or an “Unknown/not reported” category to assist you.

Reporting Guidance for Demographic Items

Own/Rent (*Tenure*)

II. Number of Assisted Households Owner/Renter Status

- **This is now a required section for FY24.**
- Report whether the household owns, rents, or has a special living arrangement.
- In general, this information is self-reported on the application by the primary applicant. If you vary benefits based on tenure, the benefit amount can also help in coding this.
- Report each household only once. We recommend using the earliest record if a household had a change in status during the year.
- If a household’s heating and/or electricity bill are included in the rent, you should count the household under line 3 “Rent with utilities in rental fee.”

II. Number of Assisted Households Owner/Renter Status	
A. Owner/Renter Status	Total Number of Households
1. Own	
2. Rent with utilities billed separately	
3. Rent with utilities in rental fee	
4. Other	
5. Unknown/not reported	
6. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Ethnicity of Primary Applicant

III. Number of Assisted Household Applicants by Race and Ethnicity - Section A. Ethnicity

- Report the self-reported ethnicity of the primary applicant.
- Each household should only be recorded once.
- If the information was not self-reported by the applicant, include the household under “Unknown/Not Reported”.

A. Ethnicity	Total Number of Households
1. Hispanic, Latino, or Spanish Origins	
2. Not Hispanic, Latino, or Spanish Origins	
3. Unknown/not reported	
4. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Race of Primary Applicant

III. Number of Assisted Household Applicants by Race and Ethnicity - Section B. Race

- Report the self-reported race of the primary applicant.
- Each household should only be recorded once.
- If an applicant selected more than one applicable category, count the household under Category 6 (Multi-race).
- If the information was not self-reported by the applicant, include the household under “Unknown/Not Reported”.

B. Race	Total Number of Households
1. American Indian or Alaska Native	
2. Asian	
3. Black or African American	
4. Native Hawaiian or Other Pacific Islander	
5. White	
6. Multi-race (two or more of the above)	
7. Other	
8. Unknown/not reported	
9. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Gender of Primary Applicant

IV. Number of Assisted Household Applicants by Gender

- Report the self-reported gender of the primary applicant.
- Each household should only be recorded once.
- If the information was not self-reported by the applicant, include the household under “Unknown/Not Reported”.

IV. Number of Assisted Household Applicants by Gender	Total Number of Households
1. Self Identified Male	
2. Self Identified Female	
3. Other	
4. Unknown/not reported	
5. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Race and Ethnicity for All Household Members

V. Assisted Household Members by Race and Ethnicity

- **This is now a required section for FY24.**
- Report the self-reported race and ethnicity of each household member.
- The “Total” row should represent the total number of household members across all assisted households.

V. Assisted Household Members by Race and Ethnicity	
A. Ethnicity	Number of Household Members
1. Hispanic, Latino, or Spanish Origins	
2. Not Hispanic, Latino, or Spanish Origins	
3. Unknown/not reported	
4. TOTAL (Auto Calculated)	0
B. Race	Number of Household Members
1. American Indian or Alaska Native	
2. Asian	
3. Black or African American	
4. Native Hawaiian or Other Pacific Islander	
5. White	
6. Multi-race (two or more of the above)	
7. Other	
8. Unknown/not reported	
9. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Gender for All Household Members

VI. Assisted Household Members by Gender

- **This is now a required section for FY24.**
- Report the self-reported gender of each household member.
- The “Total” row should represent the total number of household members across all assisted households.

VI. Assisted Household Members by Gender	Number of Household Members
1. Self Identified Male	
2. Self Identified Female	
3. Other	
4. Unknown/not reported	
5. TOTAL (Auto Calculated)	0

Final Reminders



Final Reminders

Due Dates and Final Data

- **The final Household Report is due in OLDC on December 31, 2024.**
- The final Household Report must contain non-estimated data from grant recipient tracking systems and program records.
- If you need technical assistance in completing the report, please contact APPRISE as soon as possible (do not wait until the report is due).

Final Reminders

Household Report Short Form Changes

Good news: There are no changes to the report lines or layout.

There is one change from last year:

- Last year, HHS added new sections to collect demographic data. Data on the primary applicant was required, but data on all household members and whether the household owned or rented was optional for FY23 reporting.
- HHS announced prior to the FY23 report that the optional sections would be mandatory for FY24 reporting. This was reviewed during training last year.
- **As planned, the demographic sections that were optional in FY23 are now required for FY24. Grant recipients should complete these sections.**

Final Reminders

OLDC Resources

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- OLDC is accessed through Grant Solutions.
- Log-in to Grant Solutions at <https://www.grantsolutions.gov/gs>
- Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
- If you need assistance, please contact GrantSolutions Help Desk:
 - (866) 577-0771
 - help@grantsolutions.gov

Final Reminders

Submission Process

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- The individuals who have permission to certify and submit may vary based on how you initially set up your OLDC account, but the user with the role "**Grant Administrator**" may perform all actions by default.
- To submit the form, first enter and save your report. When ready, **validate** it. Once the form is valid and correct, **certify and submit**.

Save → Validate → Certify → Submit

The screenshot shows the OLDC Report Form Status page. At the top, there are navigation links: OLDC Home, Form Selection, Report, and Report Form Status. The main content area displays the following information:

- Program Name: Low Income Home Energy Assistance
- Grantee Name: [REDACTED]
- Report Name: Household Report - Long Form
- Report Period: 10/01/2020 - 09/30/2021
- Report Status: Initialized

Below this information is a "Report Progress" section with a horizontal bar showing the following stages: Initialized (checked), Edit-Saved, Validated, Certified, Submitted, In Review, and C/O Approved. At the bottom of the page, there are four buttons: Save, View/Add Attachments, Validate, and Print. The Validate and Print buttons are highlighted with a red box.

Presenter(s):
Melissa Torgerson

Final Reminders

OLDC Warning & Error Messages

- Several validation checks are programmed into OLDC, and a warning or error message will appear if a check fails.
 - Warning Messages indicate data that may be correct but require confirmation and additional explanation in the “Notes” section of the form.
 - Fatal Error Messages indicate inconsistent data that must be corrected before Grant Recipients are able to submit their Household Report in OLDC.
- **If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.**
- **Some outdated validation checks have been triggered in the past, and if an incorrect check appears for you, please notify APPRISE so that it may be resolved.**

Presenter(s):
Melissa Torgerson

Final Reminders

Household Report Resources

- **FY24 Household Report AT & Instructions**

- <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2024-06-liheap-household-report-long-form-and-short-form-fy24>

- **“Check Before You Submit” Document:**

- <https://liheappm.acf.hhs.gov/sites/default/files/private/reports/Household-Report-Short-Form-Check-Before-You-Submit.pdf>

Final Reminders

Upcoming Training Webinars – Registration Coming Soon

- **Completing the Carryover and Reallotment Report and the Federal Financial Report**
 - *November 14th, 2:00pm ET – 3:30pm ET*
- **Completing Quarterly Reports**
 - *December 17th, 2:00pm ET – 3:00pm ET*

Final Reminders

Support Resources

- OCS Liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- LIHEAP Map State and Territory Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-state-and-territory-contact-listing>
- LIHEAP Map Tribal Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-tribal-contact-listing>
- APPRISE Team
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050
 - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647
 - Nicolas Mititelu, nicolas-mititelu@appraiseinc.org; 646-854-4982
 - Jeb Jacob, Jeb-Jacob@appraiseinc.org; 609-252-0005
 - Luke Gooding, Luke-Gooding@appraiseinc.org; 609-454-3777

Presenter(s):
Melissa Torgerson

Audience Poll Question #2

How helpful was this webinar in understanding what is needed to complete the FY24 Household Report – Short Form?

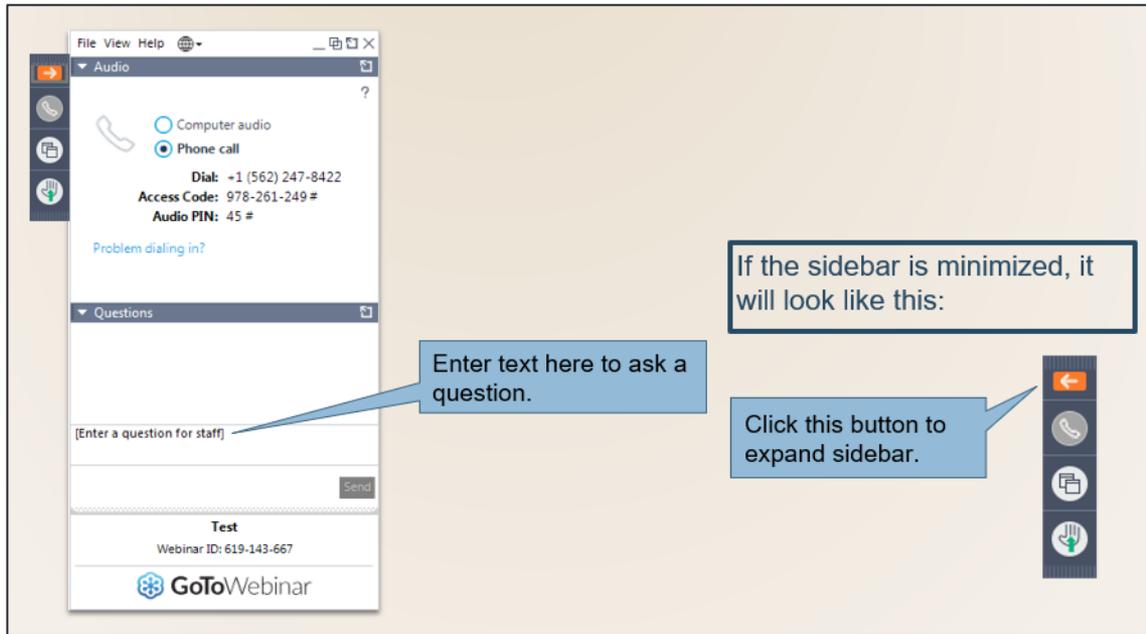
Please select one:

- **Not at all helpful**
- **Not too helpful**
- **Somewhat helpful**
- **Very helpful**

GoToWebinar Question Box

Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar “Question” box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.



The screenshot shows the GoToWebinar interface with two main sections: Audio and Questions. The Audio section includes options for Computer audio and Phone call, along with dialing information: Dial: +1 (562) 247-8422, Access Code: 978-261-249#, and Audio PIN: 45#. The Questions section has a text input field with the placeholder "[Enter a question for staff]" and a "Send" button. A sidebar on the right contains icons for audio, chat, and help. Callouts provide instructions: "Enter text here to ask a question." points to the input field, "Click this button to expand sidebar." points to the sidebar expand button, and "If the sidebar is minimized, it will look like this:" points to the sidebar icon.

Presenter(s):
Melissa Torgerson

Extra Slides on Using OLDC



Submitting the Report

Accessing OLDC

- OLDC is accessed through Grant Solutions, accessed at <https://www.grantsolutions.gov/gs>
 - Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
 - Click “Report Form Entry”
 - Select, “Low Income Home Energy Assistance” as the program, your state/agency as the grant recipient, and “Household Report” as the report.
 - Click the plus sign icon under the **10/01/2023 - 09/30/2024** to access the report.

Reporting Period ▾	Type ▾	Report Status ▾	Actions ▾
10/01/2023 - 09/30/2024	Annual		+ 
10/01/2022 - 09/30/2023	Annual		+ 
10/01/2021 - 09/30/2022	Annual		+ 



Submitting Your Final Report

- If the preliminary form status is “Submitted” (not yet accepted by your liaison):
 - In the Report Status page screen, click “Unsubmit Report”.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
View Original	Submitted	07/31/2019	Unsubmit Report Review	HTML Print Form Go

- Then you will have to click “View Original” to go into your report and click “Uncertify”. At that point, the fields in your report will become editable again. The system will not keep a copy of your old report.
- If the preliminary form status is “Submission Accepted by CO” (i.e. accepted by your liaison):
 - In the Form Selection Page, click the icon that resembles a blank sheet of paper:

Reporting Period	Type	Report Status	Actions
10/01/2020 - 09/30/2021	Annual		+
10/01/2019 - 09/30/2020	Annual	Submission Accepted by CO	  
10/01/2018 - 09/30/2019	Annual	Submission Accepted by CO (Revision #1)	  

- This will create a new, editable version of your report. A copy of the old one will be kept in the system.