HUD Office of Healthy Homes and Lead Hazard Control
Healthy Homes Initiative and Lead Technical Studies Grants
Quarterly Progress Reporting System
Online User Guide

Contents:

I. Getting Started and System Requirements

- Minimum browser requirements for the system include Internet Explorer v. 4X or higher OR Netscape Navigator v. 4.7 or higher.

  *If you need your password and user ID, contact your program manager or director who should have received this information as part of your original launch package sent in June 2003. If you have difficulty accessing the Web-based quarterly progress reporting system, however, contact the HUD Healthy Homes and Lead Grantee Reports Manager by e-mailing grantee_quarterly@hud.gov or sending a fax to (202) 755-*1000 *with your grantee number, contact information, and a detailed explanation of your difficulty.*

- To minimize scrolling, set your display screen resolution to 800x600 or higher when using this system.

- To take advantage of all the system's tools and features, please rely first on the navigation links and buttons ***within*** the online report. However, in some circumstances you will need to use your browser's "Back" and "Forward" buttons on the navigation bar at the top of your screen.

- Before starting to fill out the report, gather the information and supporting materials needed to complete your Progress Report for the current reporting period. If you have supporting documents or other material related to your quarterly report that cannot be submitted online using this reporting system, please e-mail this information to the Healthy Homes and Lead Grantee Reports Manager at ***grantee_quarterly@hud.gov*** or mail to: HUD Office of Healthy Homes and Lead Hazard Control, Attn: Healthy Homes and Lead Grantee Reports Manager, 451 7th Street, SW, Suite P3206, Washington, DC 20410. The information may also be faxed to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, at (202) 755-1000.

- Due to variations between the major Internet browsers, the online system may perform differently under some configurations. If you encounter "Error Messages" when trying to access the system, or during a session, first try "refreshing" the screen by pressing the Refresh or Reload buttons on your browser. If the error message persists (e.g., Error 500 or Error 404), follow the guidance in Part III of this document for information about different error messages.

- As a Precaution: **Save your work frequently** (at least every 15 to 20 minutes) following the instructions in Part III below.

- To prevent data conflict and to maintain the integrity of the overall report, only **one user** should access a report at a time.

II. Entering the Reporting System and Starting New Reports

1. Enter HUD's *Healthy Homes Initiative and Lead Technical Studies Grantee Quarterly Progress Reporting System* by typing www.ohhlhcgrantonline.net into your browser's address bar.

   Please Note: If you are *using the system for the first time, you may experience an initial delay downloading the site. This is normal and should not result in future delays in accessing the system.*

2. From the Welcome Page, scroll down and use the mouse to click to enter the reporting system.

3. When prompted, fill in your assigned **username** and **password** and click "Log In" to enter the system. This will take you to the *System Start* screen.

   (*Remember that your username and password are case sensitive)*

4. When using the system, you will see one "Open" report and one or more "Closed" reports on the *System Start* screen.

   - Contact HUD immediately (see Technical Questions at the end of this User Guide) if no reports appear on the start screen.

   - The most current, active report will be designated by an "Open" link. This is the report that your staff **must** complete during the designated reporting period.

5. Near the top of the frame you will see the "**Program Manager Info**" button.Please review your program's contact information by clicking on the "**Program Manager Information**" button near the top of the frame. Any changes to your contact information should be made and "Saved." Use the "Back" button to return to the System Start screen.

6. The "Closed" report was created by HUD and contains the **baseline data** needed to generate the data for the "Open" quarterly report (i.e., cumulative hazard evaluations completed, cumulative number of units completed and cleared, and Part 3 budget information). Note that the baseline report **does not** contain information for *all* report fields. "Closed" reports can be accessed by using your mouse to click on the "Closed" link next to the appropriate date. "Closed" reports are read-only and can only be edited by HUD. If you have not already done so, please confirm that data in your most recently "Closed" report is correct.

7. If the cumulative information in the closed report is incorrect OR if you need to revise other information previously submitted to HUD, please send an e-mail to **grantee_quarterly@hud.gov** (cc to GTR) that includes:

   In subject line:
   - Grant Agreement Number
   - Grantee name

   In body of e-mail:
   - GTR name
   - Description of what information needs to be changed and why
   - Name of who we can contact for more information
   - Phone number and e-mail address of the contact person

   Please use the format included with these instructions. If you do not have access to e-mail, you can fax your data change request to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, at (202) 755-1000.

8. To view and **begin work on the "Open" report** click on the "Open" link next to the date.

   - This report will remain "Open" and available to edit until you submit it to HUD (see Part IV). However, once a report is submitted to HUD, the report is "Closed" and becomes read-only and no changes can be made to this report. (See above for information on making changes to a "Closed" report.)

III. Using the Reporting System

Once your current report is opened, the system will bring up the ***Summary Grantee Data & Quarterly Report Narrative Overview*** page. This page includes the data entry fields for **Part 1A** of the report.

1. Note that there are 5 important buttons in the red bar near the top of the frame. These buttons are discussed below in more detail. They are:
   - Save Changes
   - Save and Close
   - Pre-submission check
   - Send to HUD
   - Close

2. Continue scrolling down to the *Quarterly Report Narrative Overview* heading. Below the heading is a link to the instructions for the Program Narrative Response. Click on this link and briefly review the instructions. You will note that an e-mail link **grantee_quarterly@hud.gov** (*use underscore*) is available to transmit tables, graphs, and other attachments or supplemental information related to this quarterly report. If you need to fax any of these materials, send them to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, at (202) 755-1000 and include your Grant Agreement Number, Grantee Name, Report Quarter, and GTR name on all pages. You may also mail these materials to the Office of Healthy Homes and Lead Hazard Control, Attn: Healthy Homes and Lead Grantee Reports Manager, 451 7th Street, SW, Suite P3206, Washington, DC 20410.

3. Use the "Back" button or use your mouse to click on the **Part 1A** link to return to Part 1A.

4. Scroll down to Item A1; use the mouse to place the cursor in the box and click to activate the cursor in this cell. Type in the information for this item of the report.

   Helpful Tip: The narrative fields allow the option of using the response from the previous quarter.

   - To test this feature, click on the "use previous quarter response" link when it is available. This option cannot be used unless a submitted (and "Closed") Web-based report is available from the previous quarter.

What to do if you Receive an Error Message

- If you receive an **Error 500 message**, then there are internal errors on the server (i.e. you have connected to the system, the server received the request, and for some reason the server was unable to service the request). Therefore, when you receive an Error 500 message, you should write down in as much detail as possible:
  1. what page you were using when receiving the message (Part 1A, Part 1B, etc.),
  2. the fields you most recently changed on that page, and
  3. the button you clicked immediately prior to receiving the 500 error.

  You should then submit a "Grantee Tech Support Request Form" that includes this information.

- If you receive an **Error 400 message**, then the server is down. When this happens, try accessing the system again in 20 minutes.

- For first-time users of the system that cannot use responses from previous quarters, you may want to "copy and paste" information you have in other source documents and which were used in preparing your previous quarterly reports.

5. Use the mouse to move the cursor to Item A2. Enter your information and continue through Item A7.

6. To **save your changes** at any time, click the "Save Changes" button at the top of the screen. We recommend that you save your work every 15-20 minutes.

7. After entering all data for Part 1A, click on the link for Part 1B, enter the requested data, and repeat for Parts 1C, 1D, 2, and 3 until all report sections are complete. As a suggestion, you may want to complete Part 3 only after all other information has been entered and saved.

8. In **Part 2**, Listing of Units Completed and Cleared, **DO NOT USE COMMAS IN THE NUMERICAL FIELDS.** Doing so may result in system errors (see above).

9. To **generate auto-calculations** in the Cumulative Total columns for tables 1 to 10, Items B1, B2, B3, C1, C2, and the Available Balance column in Part 3, enter all data, then hit the "Save Changes" button. The "Save Changes" button will refresh the screen and generate new values for the auto-calculation fields. Repeat this process anytime thereafter if you update data in these sections and would like to see newly calculated values. (Note that only the most recently entered data values will be used for the auto-calculation feature).

10. To **print a copy of the report**, click on the "Display Printable Version of this Report" link found at the top of each screen. A new browser window will then open with the printable version. In the new browser window, go to the File menu and select "Print."

IV. Checking for Errors and Sending the Report to HUD

1. To **check for errors WITHOUT sending the report to HUD**, simply click the "Pre-Submission Check" button at the top of the screen. If the report contains any blank fields or other errors, a new browser window will open that lists the report questions that need to be fixed.

Navigation Tips and Hints

- To **navigate between system links and required reporting fields**, use the TAB key, or use your mouse to click inside data cells and highlight the existing entry. Fields requiring information are indicated by open text boxes that allow data entry.
- To **scroll up and down** through screens, use the arrow keys or scroll bar on the right side of the screen. If the keys are not active, use the mouse to click in an area of the report that is outside a data cell to activate these keys.
- To **return to the top of the screen** at any time, click on a "Top of Page" link. These links are found near each question in the quarterly report.
- To **navigate between sections of the report**, click on the appropriate section link near the top or bottom of the screen.
- **To return to the report** from the Program Narrative Response Instructions, use the "Back" button on your browser's toolbar.
- **To return to the report** from the Help text or the Pre-Submission Check Report, click on "Close" in the browser window.

- To **fix an error**, go back to the section of the report where the error is noted and make any changes. Repeat this process until all errors are fixed.

- **Note that errors to financial data and zeros in numerical fields may not be addressed by the Pre-Submission Check. We recommend that you check these fields directly before**

submitting to HUD. (Please note that rounding is not necessary when entering financial data, e.g. $1000.31 is an acceptable entry)

- Once you have made the appropriate changes for each error, return to the Pre-Submission Check browser window and click on "Re-Check" to see if the problems are corrected. When all errors are corrected, the Pre-Submission Check will state "No Problems Detected." Your quarterly report is then complete and ready for submission.

Helpful Tip: We recommend printing out the List of Errors Screen so that you can work through all errors without moving between different browser screens. This way you'll have the "checklist" handy and can work through the list of errors more directly. To print the Pre-Submission Check errors, right click in the browser window and then click on Print.

2. To **check for errors AND send the report to HUD**, click the "Send to HUD" button. This will launch a pre-submission check (see above) and send your work to HUD once all errors are fixed. Use the process described above to review and correct errors. *Remember that reports are "closed" and become read-only once they are submitted to HUD. Be sure that you are ready to submit your work before selecting this option!*

*****IMPORTANT NOTE***

By clicking "Send to HUD", the grantee acknowledges that the report is complete, has been reviewed by all appropriate agency officials, and is the official quarterly progress report for the Healthy Homes Initiative and Lead Technical Studies Grant Program.

V. Exiting the System

1. From any of the report screens:

   - Click the "Save and Close" button at the top of the screen to **exit the report AND save your changes**. Once you've returned to the System Start screen, click the "log out" button to exit the system.

   - To **exit the system without saving changes**, click the "Close" button at the top of the screen (if the button is not visible, click the arrow at the right of the scroll bar until the button appears). Once you've returned to the *System Start* screen, click the "log out" button.

2. From the *System Start* screen, click the "log out" button.

Technical or Programmatic Questions?

If you have technical questions about entering data, using the system, or if you encounter technical problems, please fill out the *Technical and Programmatic Support Request Form* provided to you and e-mail it to **grantee_quarterly@hud.gov** (use underscore) or fax it to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, at (202) 755-1000. You will be contacted within 48 hours (2 business days) of your request.

HUD Office of Healthy Homes and Lead Hazard Control
Healthy Homes Initiative and Lead Technical Studies Grants
Quarterly Progress Reporting System
Frequently Asked Questions

These FAQs were developed based on grantee questions and requests received during the first online reporting period for HUD's Lead Hazard Control Grant Program.

1. **I do not have information for the Web-based system and/or my password and user id? What do I do?**

   Most of the instructions are available in the Quarterly Reporting System (www.ohhlhcgrantonline.net). In addition, HUD sent a launch package to the primary contact person for your program (usually the program director or manager). Please check with this contact person for passwords and other system information. If you *still* need assistance, please send a detailed request to grantee_quarterly@hud.gov.

2. **What happens if I do not submit my quarterly report to HUD on time?**

   Any voucher requests for payments made through LOCCS will NOT be paid until the quarterly report and/or final report is received by HUD.

3. **How do I make changes to a "Closed Report" that has been submitted to HUD?**

   If you need to make any changes to your report after it has been successfully submitted to HUD, please detail your requested changes in an e-mail to grantee_quarterly@hud.gov with a copy to your GTR OR fax a hard copy of the requested revisions to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, at (202) 755-1000. Allow 2-3 weeks for changes to be reflected in the online version of your report.

4. **When I enter narrative text into the report, the text is cut off at the end of the section. Why does this happen?**

   Both Netscape and Internet Explorer impose a limit of 30,000 characters per text field.

5. **In Part 2, what do I enter in the apartment number field?**

   The apartment number field refers to the actual apartment unit address, NOT how many units were completed at that address. The system counts how many units were completed based on how many lines are used in this section. If you indicate 1-12 in the apartment number field, the system will think you completed only one unit. Therefore, if 12 units were completed at the same address, enter the address 12 separate times (can be copied and pasted), and assign an apt # for each.

6. **What kind of financial data should be entered in Part 3, Financial Reporting?**

   Part 3 tracks the payments made to the healthy homes initiative or technical studies grantee through the HUD Line of Credit Control System (LOCCS). Therefore, financial data entered in Part 3 should only reflect those grant funds actually PAID through LOCCS during the current reporting period. *(Do NOT include any amounts for expenses that were incurred during the current grant period but not yet paid through LOCCS.)*

   Note also that the Office of Healthy Homes and Lead Hazard Control tracks grant fund payments based on the date a Request for Voucher Payment through LOCCS is actually paid, NOT when it is submitted by the grantee. For example, if you submit a voucher on September 26th (during the 3rd quarter) and it was actually paid on October 1 of that year, this payment should be reported in the 4th quarter, not the 3rd quarter even if it was expended and submitted in the 3rd quarter.

   If you need further assistance or clarification on how to complete Part 3, please send an e-mail to grantee_quarterly@hud.gov or contact your GTR.

7. **I was kicked off the system and my data was erased. What do I do?**

   The system is set to continuously re-save your work (so, any system shut-downs are not the result of a timeout feature). Therefore, if you experience difficulty while using the system, you should try reloading the page (click the reload button on the browser) or shut down all instances of the browser (browser windows) and restart. If problems persist, contact technical support.

8. **I am getting an error 500 message when using the system. Why does this happen? What do I do when if I receive an error 500 message?**

   You may receive an error 500 message when there are internal errors on the server (i.e., you have connected to the system, the server received the request, and for some reason the server was unable to service the request). Therefore, when you receive an error 500 message, you should write down in as much detail as possible:
   1. What page you were using when receiving the message (Part 1A, Part 1B, etc.),
   2. The fields you most recently changed on that page, and
   3. The button you clicked immediately prior to receiving the 500 error.

   You should then submit a “Grantee Tech Support Request Form” to grantee_quarterly@hud.gov that includes this information – IT staff will use your form to diagnose and fix the problem.

9. **I received an error 400 message when using the system. What does this mean? What should I do?**

   An error 400 message means that the server is down. When this happens, try accessing the system again in 20 minutes

10. **The system screens are not displaying properly for me and/or I’m having trouble with the system’s navigation. Why is this happening?**

    It is possible that your browser is not compatible. Your browser **must** be Netscape Version 4.7 or higher or Internet Explorer Version 4X or higher. If you are using a compatible browser, yet are still experiencing difficulties, please submit a “Grantee Tech Support Request Form” that includes as much detail as possible about what you are experiencing to grantee_quarterly@hud.gov. Our staff will use your form to help diagnose and fix the problem.

11. Our office administers more than one healthy homes grant. While working in one quarterly report, I'd like to access a quarterly report for our other healthy homes grant. However, I cannot access the login screen necessary to access another report. What do I do?

In order to access a different grantee quarterly report, you will need to shut down all browser instances and re-start the Web-based system. This is the only way to log in under a different grant number and access information for another grant administered by your office.

12. Do I still need to submit a SF 269 form? I do not see it on the Web.

YES! While this form is not included in the Web-based reporting system, it is available on the Web: http://www.hudclips.org/sub_nonhud/html/forms/htm in the Standard Forms section. See #13 in the FAQs below on where to submit the SF 269 form.

13. Where do I send the 269 form and/or other attachments?

Please send all attachments via e-mail (grantee_quarterly@hud.gov), fax (202-755-1000), or regular mail to the Healthy Homes and Lead Grantee Reports Manager, Zuleika Morales, with a copy to your HUD GTR.

HUD Office of Healthy Homes and Lead Hazard Control
Healthy Homes Initiative and Lead Technical Studies Grants
Quarterly Progress Reporting System
Helpful Hints

- Navigating around the Quarterly Reporting System is relatively easy. Each section has a **hyperlink**, which will take you to the top of the page so you can save the information regularly. The hyperlinks at the top and bottom of the page let you move between sections of the report.

- Use the ***grantee_quarterly@hud.gov*** link at the top of the page to submit attachments to the quarterly report.

- If your narrative response has not changed from last month click on the **Use Previous Quarter Response** hyperlink. This can also be used if you want to pull the information from last quarter into a particular section of the report so you can edit it for this quarter.

- If you need additional instructions, click on the **Help** hyperlink located above the section you are working on.

- The detailed information that appears under **Table 7**: Description of Outreach Materials, **Table 8**: Data Collection Instruments, **Table 9** Data Collection Activities and **Table 10**: Data Analysis Activities was pulled from your workplan.

- In **Table 11**: If a task is not yet completed select the **Not-Yet-Started** or **In Progress** button. Do not include a completion date until the task is completed.

- To add information in Part 2 select the **Add a Unit** hyperlink.

- To delete a unit that was entered under Part 2 click on **Edit** and then click on **Delete this Item**.

- The financial information to be submitted for the current reporting period in **Part 3** is based on the negotiated budget included in the HUD grant agreement (including and modifications).

- When entering cost information in **Part 3** include cents, if possible, and do not use commas.

- **Reminder:** Information is required in all the narrative fields and table cells. If information is not entered it will trigger a pre-submission check. If no activities were undertaken for the reporting period specify this in writing in the narrative fields and by entering a 0 in the table cells where a number is requested.

- Once you click on **Submit Your Report** you cannot edit it. Review the information in Parts 1, 2, and 3 of the quarterly report and confirm that it is correct.

- At the top of the page, click the **Pre-Submission Check** button. This checks your report to confirm that you have filled it out completely. If it reports errors, address them before proceeding.

- Once you have reviewed your report and resolved any errors identified by the by the Pre-Submission check, click the **Send to HUD** button. Once your report is sent to HUD, you cannot edit it, but you can still view it.