REFERENCES

Agreements between DHS and Community Action Agencies/Limited Purpose Agency (Grantees) include the following language regarding the FACSPro database system:

> *The Grantee shall use the system as directed by DHS, including but not limited to the following functions: intake, agency contact information and reporting purposes. Failure of the Grantee to utilize the DBA FACSPro software system may result in delays in the approval and processing of Grantee payments.*

PURPOSE

FACSPro is a database purchased by the Michigan Community Action Agency Association for use by Grantees for the purposes of intake, establishing income eligibility, and collecting and tracking data for customers served by the Grantees and to track programs offered by the Grantees. FACSPro also links the completed Inspection Work Order Cost Center (IWC) field audit tool to the NEAT audit.

Grantees are required to use FACSPro to process all applications for all BCAEO administered programs including the following:

- CSBG Specific Assistance
- DOE WAP
- LCA MEAP
- LIHEAP WAP
- LIHEAP Crisis Assistance

In addition to the programs administered by BCAEO, the Grantee should also enter all Grantee programs into FACSPro, either available as a service through the intake process or through the mass entry module, for the purpose of reporting, specifically the CSBG-IS report.

POLICY

Super User Responsibilities

FACSPro requires the designation of one Super User in the state, and that position is located within BCAEO.

The Super User responsibilities include:

- Security group creation and maintenance for FACSPro
- Create system programs
- Assist with training for System Administrators
- Monitor data and accuracy of data within the system
- Provide technical support to System Administrators regarding FACSPro
- Facilitate System Administrator meetings on a regular basis

Grantee System Administrator Responsibilities

Each Grantee must have at least one System Administrator.

The Grantee System Administrator is responsible to/for:

- Provide training for FACSPro to Grantee staff
- Monitor the accuracy of data, provide agency reports and system reports to Grantee managers
- Provide basic technical support such as responding to all Grantee end user requests for assistance in a timely manner
- FACSPro software installation and trouble-shooting
- Provide programmatic knowledge of all programs utilized in the software
- Provide Grantee program set up and maintenance
- Set up Grantee funds/contracts/grants
- Provide Grantee user access
- Referral set up
- Vendor file maintenance
- Knowledge of how to use and train modules within FACSPro
- Create reports such as Ad Hoc, System Reports, and CSBG IS reports
- Know how to delete customers and action plans from the system
- Maintain updated staffing list within FACSPro
- Verify correct eligibility for all Grantee programs in FACS Pro

Grantee Program Entry

The Grantee System Administrator is responsible for entering data from Grantee programs within FACSPro.

BCAEO will provide Grantee System Administrators with a standardized method of entering any program that is overseen by BCAEO. System Administrators must adhere to naming conventions while entering agency program names and funding source information.

Grantee Intake Staff – Application Processing on FACSPro

For each client application, Grantee intake staff must obtain, enter and verify the information collected from the client. All documents provided by the client must be scanned and attached to the client record in FACSPro using the document attachment feature. The intake worker must complete all required fields during intake which are identified by an underlined title. Before program services are assigned, the intake worker must make sure that all required information has been entered with no red flags on the FACSPro intake screen. All red flags in FACSPro must be reviewed and corrected before services/programs are assigned. All yellow flags must be reviewed and corrected as necessary.

The intake worker must include the Weatherization disclaimer on the Client Intake Report generated from FACSPro when working with a weatherization client. The weatherization application and/or client intake report must be reviewed and signed by the client and stored in a physical file. A scanned copy of the weatherization application must be attached to the client's record in FACSPro to expedite future monitoring visits.

Grantee Management

FACSPro provides a centralized system to manage and operate agency programs. For programs funded by BCAEO, the Grantee must review and verify income eligibility configuration for each program. This must be done when an agency program is entered into FACSPro. Documentation of the review and testing of the system for accuracy will be checked during monitoring.

FACSPro provides system management reports. These reports allow Grantee managers to evaluate user productivity and capacity, program setup, client peak times and client compliance. Grantee managers should develop a procedure to review the information on a regular basis in order to support system and data integrity.

Available FACSPro System Reports: (System Report icon in FACSPro)

- Agency Report
  The agency report can be used to review basic information entered into FACSPro.
  - Optional reporting items are selected in the Sections tab of FACSPro
    - Main Information
    - Contact Information
    - Notes
    - Hours of Operation
    - Mission Statement
    - MOU
    - Travel Information
    - Insurance
    - Program Information
    - Eligibility Requirements
    - Services
    - Relationship

- Intake Compliance Report
  The Intake Record Compliance Report can be used to evaluate the number of processing days from creation to intake by employee.

  - Enter starting and ending date range for report
  - Report contains
    - Total number of records created within the entered range
    - Percent of records out of compliance
    - Intake date, date created, days to creation, intake worker name, customer name, system ID

- Outcome Compliance Report
  The Outcome Record Compliance Report can be used to evaluate the number of processing days from indicator creation to completion by employee.

  - Enter starting and ending date range for report
  - Report contains
    - Total number of outcome achievements completed
    - Percent of records out of compliance
    - Grantee program name, indicator completion and creation date, number of days to creation, user name, system ID, customer name

- System Productivity Report by Audit or User Activity
  There are two types of system productivity reports to select from, audit and user activity. The Audit Report can be used to evaluate employee productivity or work load. The report will list by employee the number of client records added and updated within a period. The User Activity Report lists when each employee

logged in and out of the system.

- Audit Report
  - Enter starting and ending date range for report
  - Report contains
    - Total client records added within the entered range
    - Total client records updated within the entered range
    - Number of client records added and updated by employee

- User Activity Report
  - Enter starting and ending date range for report
  - Report contains
    - Employee names, login dates and times and the corresponding logout dates and times within the entered range

BCAEO Staff – Access to FACSPro

All BCAEO staff, except for the Super User will have read-only access to data and the ability to extract data for reports, reviews, and projects. Designated Weatherization staff will have full access to assist with help desk inquiries involving WA8 and the Weatherization module.

FACSPro System Assistance Protocol

Any troubleshooting regarding Grantee program entry or usage can be initiated using the Help button in FACSPro.

When a user has a question or needs assistance with an issue within FACSPro, the user should contact their agency System Administrator. The System Administrator should be able to assist with any troubleshooting. If the System Administrator is unable to assist, the System Administrator will then contact the Super User. If the Super User is unable to assist, they will contact DBA Technologies, LLC.

The Super User and the FACSPro programmers review all new feature and system enhancement requests to determine the impact on the entire system before implementing.

PURPOSE

Standardize agency program and grant setup in FACSPro to ensure correct reporting and monitoring for all programs administered by BCAEO.

POLICY

All programs administered by BCAEO must adhere to the naming conventions listed in this policy. Agency programs must be setup, reviewed and tested in FACSPro prior to referring clients to services.

The following fields must be completed when setting up an agency program:

- **Program Name:** The program name identifies the agency program. The program name must use the naming conventions in the Agency Program Naming chart in this policy.

- **System Name:** The appropriate system name must be selected for each agency program. The system name list for each program is in the Agency Program Naming chart in this policy.

- **Dimension(s):** Dimensions are broad categories that link agency programs to interventions. The system administrator must ensure all the appropriate dimensions are listed in FACSPro after a new agency program has been entered. For each agency program, select at least one corresponding dimension.

- **Program Eligibility Requirements:** The Grantee must review program eligibility requirements for accuracy after a new agency program has been entered.

- **Funding Source**: All agency programs administered by BCAEO must contain a funding source, funding type, and grant/contract number. The Funding Source Naming chart in this policy lists the required entries for funding source, funding type, and grant/contract numbers.

Agency Program Setup

Naming Conventions

The Grantee will use the naming conventions as shown in the chart below when establishing agency programs in FACSPro. Use the Agency Program Name column for identifying the naming convention for program names and the System Program column for selecting the appropriate system program. The Grantee System Administrator can add text to the agency program name after the required label.

- Agency Program Name and System Program:
- Locate the PROGRAM in the first column of the chart
- Enter the corresponding AGENCY PROGRAM NAME
- Make sure the corresponding SYSTEM PROGRAM is selected during setup

Examples: Program: CSBG
Agency Name: BCAEO-CSBG-(Agency to determine)
System Program: CSBG

Agency Program Naming Chart

PROGRAM	AGENCY PROGRAM NAME *	SYSTEM PROGRAM
CSBG	BCAEO-CSBG-*(Agency to Determine)*	CSBG
CSBGD	BCAEO-CSBG DISCRETIONARY	Discretionary Funds Program
CSBGM	BCAEO-CSBG MIGRANT SERVICES	Migrant Services
CSBGT	BCAEO-CSBG VITA TAX SERVICES	VITA-Tax Preparation Program
CSBGT	BCAEO-CSBG NON VITA TAX SERVICES	Tax Preparation Program-NON VITA
LCA	BCAEO-LCA	Emergency Services-FUEL-LCA
MEAP LCA	BCAEO-MEAP-LCA	Emergency Services-MEAP-Deliverable Fuel
DOE/LIHEAP	BCAEO-Weatherization	Weatherization

Funding Source Setup (Non-Weatherization Programs)

Grantees will use the chart shown below to standardize the grant entry for the funding type, funding source and the grant/contract number.

Funding Source Naming Chart

AGENCY PROGRAM NAME	FUNDING TYPE	FUNDING SOURCE	CONTRACT NUMBER
BCAEO-CSBG-*(Agency to Determine)*	Federal	Michigan Dept. of Human Services	Contract # from SOE. Examples:
BCAEO CSBG	Federal	Michigan Dept. of Human Services	CSBGXX-12345-1
BCAEO-CSBG DISCRETIONARY	Federal	Michigan Dept. of Human Services	CSBGDXX-12345
BCAEO-CSBG MIGRANT SERVICES	Federal	Michigan Dept. of Human Services	CSBGDXX-12345
BCAEO-CSBG VITA TAX SERVICES	Federal	Michigan Dept. of Human Services	CSBGDXX-12345
BCAEO-CSBG NON VITA TAX SERVICES	Federal	Michigan Dept. of Human Services	CSBGDXX-12345
BCAEO-LCA	Federal	Michigan Dept. of Human Services	LCAXX-12345
BCAEO MEAP LCA	Federal	Michigan Dept of Human Services	LCAXX-12345

Funding Source Setup (Weatherization Programs only)

Weatherization Agency Programs (DOE, DOE-S, MPSC, LIHEAP, Gas Utility, and Electric Utility) are entered by the system administrator during funding setup. The weatherization funding source option in FACSPro allows the system administrator to setup multiple funding sources.

Steps to setup the Weatherization Funding (Enter each funding source using the steps below):

- Enter into the Funding Source Option
- Click the New button
- Enter the Grant information and the Funding Source
- Click the Weatherization Funding Source drop down list to select the funding

When the job is closed out and imported to the cost center, FACSPro will automatically deduct the amounts from the funding sources based on the cost center tab on the IWC.

PURPOSE

FACSPro contains a customer intake process and a program module called WxPro.
This policy identifies the fields that must be entered by the Grantee during the intake process to determine Weatherization Assistance Program (WAP) eligibility and the information required in the WxPro module.

POLICY

FACSPro must be used to determine WAP income eligibility, assignment of the household to the wait-listing, Inspection/Work Order/Cost Center (IWC) creation and completion, pre and post inspection importation and National Energy Audit Tool (NEAT) importation.

WxPro Module Sections

- **Review Queue:** Select the appropriate category from the drop down menu to determine the status of all WAP applicants. The list includes:
  - Waitlisted
  - Ineligible (Used for those found ineligible after enrollment into program). Note reason in the “notes” box before hitting save.
  - On Hold
  - IWC Created
  - Pre-Inspection Scheduling
  - Deferred/Walk Away Roof (enter reason in “notes” prior to saving in this queue)
  - Deferred/Walk Away H&S (enter reason in “Notes” prior to saving in this queue)
  - Inspection
  - Work Order
  - Job Assigned
  - Post Inspection Scheduling
  - Post Inspection Complete
  - Cost Center
  - Final Close Out

WxPro Order of Queues:

1. Waitlisted – Once in waitlisted, when ready to move to new queue, click on Blank IWC. You will automatically move queues to IWC Created.

   IWC Created- Once ready to move to Pre Inspection Scheduling, using the New button, choose Pre Inspection Scheduling and Save.

2. Pre Inspection Scheduling- Choose the Scheduling button and enter the date of the pre-inspection and the auditor performing the pre-inspection. Then choose Inspection.

3. Inspection- the Energy Auditor would return and enter inspection information into the IWC and then import/export IWC. Once Imported, choose New and go to the next queue, Work Order.

4. Work Order- The Energy Auditor creates the work order and the QCI Checklist. Import IWC with work order information. Using the New button, Choose Job Assigned queue.

5. Job Assigned- Enter the job assigned information with contractor/crew assignment information. This is confirming that the job information and QC checklist (created and signed by the Energy Auditor) have been sent to the contractor/crew and they accepted.

6. Post Inspection Scheduling- This queue means that the crew/contractor have confirmed work is complete and signed off on the QC checklist. Using the scheduling option, enter when the post inspection is scheduled and the QCI performing the inspection.

7. Post inspection complete- At this time the IWC has been updated and imported, the QCI completed the QC Checklist and it has been updated in the file.

8. Cost Center: This is the phase where the agency completes the cost center and then imports the final IWC into FACSPro.

9. Final Close out- Once the Post completed IWC is imported into FACSPro, Choose New and move to final close out. Make sure if you are closing a job in the first 14 days of a month with the intent to claim the previous month that you change the Final Close out date in the bottom left corner before hitting save.

WAP Application: The application displays information on the application in the WxPro module including the system ID, job number, address and current queue. The application can be updated using the Update Status/Movement tab to move the application to the next step in the process, e.g. from IWC created to Pre Inspection scheduled.

Scheduling: This section allows viewing of scheduled actions and the ability to schedule new actions.

WAP FACSPro Data Flow
The required WAP information is collected via the FACSPro system, the IWC and the WA8.6/NEAT.

- WA 8.6/NEAT uses a Microsoft Access-style database. WA 8.6 will not work over the internet as the database will not track multiple user points.
- DBA FACSPro uses a SQL (sequel) server database. FACSPro allows multiple user points and works well over the internet.
- The IWC is an Excel spreadsheet that serves some database functions. Excel works as a program on a PC and allows data to be entered at a single user point on a specific file.

Saving the IWC outside of the FACSPro system allows information to be entered in the field with no required internet connection.

The process of collecting and entering WAP data is broken down into specific steps and the results are displayed in one, two or all three of these formats. Using the FACSPro to Excel to WA 8.6 to FACSPro, the process flow is as follows:

1. Client intake data is entered. (FACSPro)

2. Program eligibility is determined by analyzing the intake data. (FACSPro)

3. An eligible client household is activated in the WxPro module once the IWC is created. (FACSPro)

4. The FACSPro IWC common data points are populated with information from the intake information. (FACSPro)

5. Field audit data is entered on the IWC. The IWC is used as a means to enter data collected while not linked to the internet. (Excel IWC)

6. The client specific IWC is imported back into FACSPro with the added pre inspection data. (FACSPro)

7. FACSPro exports the IWC data to WA 8.6 sharing the pre-inspection field data.

8. Energy measure(s) data is entered into the WA 8.6 program independent of the FACSPro system to create an energy audit. (WA 8.6)

9. The energy audit is imported into FACSPro to create a work order. (FACSPro)

10. An SIR generated work order must be created using WA 8/FACSPRO within five (5) business days of the ”inspection.”

11. Job shall be assigned (using queue in FACSPRO) within five (5) business days of contractor acceptance.

12. After contractor/crew reports the job as completed, the QC Inspector shall move to the “Post Inspection Queue” within five (5) business days.

13. Grantee staff or contractor inspector inspects the work.
    a. If all work passes inspection, Grantee staff/contractor approves the job for payment.
    b. If work does not pass inspection, QC Inspector specifies additional work to be done to bring work up to specifications. The contractor has five (5) business days to make the necessary modifications/corrections and arrange for re-inspection.

14. When work is entered in “Post Inspection” queue, the “Cost Center” shall be completed in FACSPRO within five (5) business days.

15. The Grantee shall move the job to the “Final Close Out” queue by the fourteenth (14th) of the next month.

EXCEPTION: For multi units (5+ and more units per building) with shared heating systems, or shelters, use the Excel formatted 1071 to report these job completions. This form is available upon request from your Weatherization Technical Monitor.

PURPOSE

FACSPro contains a board meeting tracking module called Board Pro. This policy will identify the fields that must be entered by the Grantee in Board Pro.

POLICY

The following Board Pro sections must be maintained and updated by the Grantee.

- **Board Setting:** The Board Setting section of Board Pro allows the Grantee to enter the following fields.
  - General Information
    - Total members on Board
    - Number of members to make quorum
    - Default days after meeting for minutes submission
    - By-Laws – The Grantee's current **by-laws must be attached as a pdf file** to FACSPro.
    - Quorum effective date
  - Sector Profile
    - A description of the board member sector representation and the number needed
- **Board Member Info:** The Board Member Entry section of Board Pro allows the Grantee to enter in general contact information, terms, and committee data on each board member. The following fields are required.
  - General Information
    - First Name
    - Last Name
    - Company
    - Email
    - Mailing address including county
  - Term
    - Term Start Date
    - Term End Date
    - Sector
    - Title

NOTE: If an agency has a Vacant Position on their board, enter the position with the name First Name Vacant, Last Name Vacant using the agency address. When this position is filled the agency can end the term of the vacant position and add the new board member.

- **Board Meeting:** The Board Meeting section of Board Pro allows the Grantee to enter in board meeting schedules and track the board member attendance. The following fields are required.
    - General Information
        - Date of Meeting
        - Time
        - Location
        - Type of Meeting
        - **Minutes must be attached to FACSPro, including any handouts or attachments**
    - Attendance
        - Member
        - Employee
        - Type of attendance

.

PURPOSE

FACSPro contains a mass entry module for capturing additional information from Grantee programs not setup in FACSPro. This policy will identify the fields that must be entered by the Grantee to be compliant with the CSBG-IS (CAA IS) report.

POLICY

The mass entry module must be completed prior to starting the reporting process for the CAA IS report. The Grantee can enter information in the mass entry module throughout the year. The Grantee is responsible for providing and maintaining source documentation supporting the information entered in the mass entry module.

Steps:

- The System Administrator will need to create an agency program and connect it to a system program in FACSPro.
- The System Administrator will need to verify which action plan has the correct National Performance Indicator attached and verify with the state Super User that they have access to that action plan.
- Prepare source documentation for reference during data entry.
- Open FACSPro and login.
- Double-Click on the Mass Entry Icon.
- Click the New button.
- Enter all required fields.

Mass Entry Module Required Fields:

- **Dimension:** Select the most appropriate dimension from the drop down list. This dimension will need to match the system program action plan chosen.
  Examples: Basic Needs, Community Relations, Education, Emergency Services, Employment, Energy, Food, Family – Basic Needs etc.

- **System Program:** Select the appropriate system program from the drop down list. The system program list is associated with the dimension.
  Examples: CSBG, Weatherization, etc.

- **Agency Program:** Select your agency program from the drop down list that applies to the data you are mass entering.

- **Intervention:** Select the most appropriate intervention from the drop down list. Options will appear based on the action plan set up for the system program. Examples: Client receives follow-up, Home receives repair services etc.

- **Indicator:** Select the most appropriate indicator from the drop down list. Examples: 1.3.D– Number and percent of participants demonstrating ability to complete and maintain budget for over 90 days, 2.1.D Safe and affordable housing units in the community preserved or improved through construction, weatherization…, etc.

- **Unit:** Select the most appropriate unit from the drop down list. Examples: Events/Efforts, Households, Individuals, Meals, Project/Initiatives etc.

- **# Served:** Enter the number (units) served for the program.

- **Begin Date:** Enter the starting date of the program.

- **End/Actual Date:** Enter the ending date or the actual date of the program or time period that the number/units were served.

- **IS Included:** Check the IS Included box for Indicators 1 through 6 to ensure the # served (units) will be counted in the IS report.

PURPOSE

FACSPro provides a method to assist BCAEO with oversight and monitoring responsibilities for programs administered by BCAEO. FACSPro will store attached electronic documents for each client and agency.

POLICY

Electronic documents must be attached to FACSPro for all programs administered by BCAEO. Below is a list of the required documents to be attached to each client record and each agency record. The attached documents should be stored in a pdf file.

Client Records and Documents:

1. All required client file/building file documents. (See also CSPM Item 612 for WAP files)

    - Copy of the signed FACSPro Customer Report or the client application with original client and agency signatures must be in the physical file as well as scanned into FACSPro for that client.

    - Copies of all documents used to determine income eligibility (listed above) including self- declarations.

    - Asset test verifications and all documents supporting declared assets (e.g. copies of bank statements, retirement funds, savings bond); **OR** automatic asset eligibility documentation.

    - Documented phone conversations (**with names, dates, etc**.) with public case workers

    - **All** calculations of income should be properly entered into the Income screens of FACSPro.

    - The type and dollar value, of the benefits provided.

    - All source documents used to determine income eligibility. The following items are acceptable documentation:
        - ❖ Copies of paychecks or pay stubs;

- Written statements from employers;

- Letters, benefit statements, or other documents from income sources, e.g., DHHS, Social Security, VA;

- Unemployment Benefit determination letter or online benefits information;

- W-2 statements and tax forms.
  Note: They will seldom be adequate by themselves unless the date of application is between January 1 and January 31. Note: An exception may be made for the self-employed, since tax records are a convenient source of information about their income. However, they should be used in conjunction with a self-declaration.

- Other documents the program operator has reason to believe will **fully verify** the ANNUALIZED, or gross income of the applicant.

- Self-employment income must be documented for each type of self-employment activity or business. Business expenses may be deducted from the gross income amount determined for each self-employment activity/business. Documentation of claimed expenses must be included in the client file information.

  NOTE: Losses from a single self-employment source of income cannot be applied to any other self-employment income or other household income types. In other words, if self-employment business A realizes a loss of $10,000, the income from that source is considered zero. The $10,000 loss cannot be deducted from self-employment business B or other household income.

  Allowable expenses for self employment include all of the following:
  - Identifiable expenses of labor, stock, raw material, seed, fertilizer, etc.
  - Interest and principal on loans for equipment, real estate or income-producing property
  - Insurance premiums on loans for equipment, real estate and other income-producing property.
  - Taxes paid on income-producing property.
  - Transportation costs while on the job (example: fuel)
  - Purchase of capital equipment.
  - A child care provider's cost of meals for children. Do **not** allow costs for the provider's own children.

- Any other identifiable expense of producing self-employment income except those listed below.

The following are **not** allowable expenses for self employment:

- A net loss from a previous period.
- A net loss from another type of self-employment.
- Federal, state and local income taxes.
- Personal entertainment or other individual business expenses.
- Money set aside for retirement.
- Depreciation on equipment, real estate or other capital investments.

2. Manual calculation documentation used to determine Income Eligibility prior to FACSPro data entry

3. Signed Application or signed client intake report with disclaimer.

Agency Records:

- Annual Audit
- IRS 990, if applicable
- Letter of Determination, if applicable
- Financial Policy Manual
- Cost Allocation Plan, if applicable
- Indirect Cost Rate Agreement, if applicable
- Procurement Policy

- Conflict of Interest Policy
- Employee Handbook
- Mission Statement
- Organizational Chart (Including position titles)
- By-Laws
- Board Meeting Schedule
- Board Meeting Minutes (30 days after each meeting)
- Community Needs Assessment
- Landlord Agreement Policy
- Appeals Policy
- Walk Away Policy
- Equipment Inventory List
- Inventory Policy

- Standard Accord Form, if applicable
- Limited English Proficiency Guidance
- Source documents for Mass Entry data entry could include sign in sheets etc.
- Any other documents required on the Annual Agency Checklist

Steps to attach electronic documents: Make sure the electronic documents are scanned and saved as a pdf file before attaching to FACSPro.

Client Documents:

- Open FACSPro and login
- Click on Customer Intake
- Find the client's record
- Click on the Documents button
- Click on the New button
- Enter the following fields
    - Document Name
    - Description: Please list the date the document was received or the effective date for the document in the Description field.
- Click the Attach button and follow the prompts

*Note, each intake file can be saved by customer per program and date of service. Ex. Smith_LCA_9-2014

Weatherization Technical Documents:

- Open FACSPro and login
- Click on Customer Intake
- Find the client's record
- Go to Wx Module
- Click on Weatherization Application
- Go to the Documents Tab
- Click New
- Select Type of document
- Enter Name for document
- Find document and attach
- Click Save.

*Note technical documents can be saved in one file rather than each individually. Save the file with the customer last name, date of service, and name of document. Ex. Smith_9-2014_technical docs. Then add a description of the documents in the description box before saving.

Agency Documents:

- Open FACSPro and login
- Click on System Admin Icon
- Click on Agency Icon
- Find the correct agency
- Click on Menu
- Click on the Agency Document option
- Enter the following fields
    - Document Name
    - Description: Please list the date the document was received or the effective date for the document in the Description field.
- Click the Attach button and follow the prompts

PURPOSE

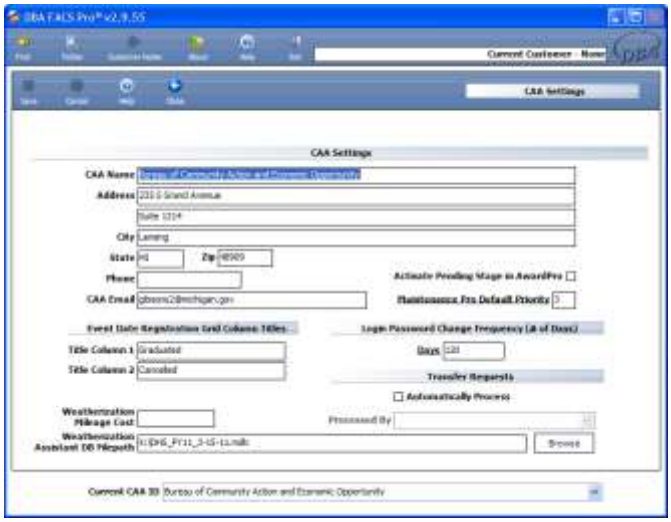
FACSPro contains a module for capturing additional information about the agency. This policy will identify the fields that must be entered by the Grantee and will be reviewed by BCAEO.

POLICY

The data entered is visible in the information/referral module and must be updated within 30 days of any known change.

Steps: Data Entry

- Open FACSPro and login
- Click on the System Administration Icon
- Double-Click on the CAA Settings Icon
- Enter all required fields



Required Fields by menu commands:

- **Agency Main Information**
  - Name of Agency
  - Address
  - City, State, Zip
  - Phone numbers, extensions, and fax
  - Email and Website
  - Weatherization Assistant DB file path

    This required field is the location of the NEAT database on the grantee's system. The location path must be updated annually or upon request from BCAEO.

    Naming convention: Agency Name -_Program Year – Date of Creation.
    Example: x:\MDS-PY11-3-15-11.mdb

Steps: Data Entry

- Open FACSPro and login
- Click on the System Administration Icon
- Click on the Agency Icon
- Enter all required fields

- **Contact Information:** The grantee must enter the agency key personnel and contact information. Employees may also be entered in the Employ section in the System Admin Module.
    - First Name
    - Last Name
    - Title
    - Program and Department
    - Phone number and extension
    - Fax number
    - Address
    - City, State, and Zip
    - Email

- **Hours of Operation:** The grantee must enter the hours of operation in the fields provided and enter additional notes as needed.

- **Mission Statement:** The grantee must enter the agency mission statement.

- **Agency Documents:** The grantee must attach all required electronic documents associated with the agency in the Agency Documents section in a .pdf format. See CSPM Item 909 Required Attachments – Electronic Documents.

    - Document Name
    - Description: The grantee must enter the date entered into FACSPro along with the description as needed.
    - System Program

REFERENCES

- The Community Services Block Grant Act (42 U.S.C. 9901 et seq.) as amended
- Community Services Block Grant Agreement
- CSPM Item 504

PURPOSE

FACSPro database was purchased by the Michigan Community Action Agency Association, local Community Action Agencies, and one Limited Purpose Agency for the purposes of intake, establishing income eligibility, and collecting and tracking data for customers served by the agencies and to track programs offered by the agencies.

FACSPro must be used for programs administered by the Bureau. In addition to the programs administered by the Bureau, the CAA should also enter all agency programs into the FACSPro, either available as a service through the intake process, mass entry, or DBA congregate pro module.

The CSBG Act, Sec. 678E. outlines State Accountability and Reporting Requirements and indicates that:

> *"Each State shall annually prepare and submit to the Secretary a report on the measured performance of the State and the eligible entities in the State…Each State shall also include in the report an accounting of the expenditure of funds received by the State through the CSBG program, including an accounting of funds spent on administrative costs by the State and the eligible entities, and funds spent by eligible entities on the direct delivery of local services, and shall include information on the number of and characteristics of clients served under this subtitle in the State, based on data collected from the eligible entities."*

In collaboration with HHS/Office of Community Services (OCS), NASCSP has developed a state reporting mechanism (the CSBG Annual Report) to collect and compile the above information and will present a national report to HHS/OCS. The State will use the FACSPro statewide database system to collect and compile the local CAAs reporting elements included in the NASCSP CSBG Annual Report.

Due to the fact that many agencies aren't getting correct information for the final CSBG Annual Report, BCAEO is suggesting that agencies review and submit agency information semi-annually.

POLICY

This policy will provide guidelines and instructions for preparation and submittal of the CAA CSBG Annual Report using FACSPro.

- CAAs should have logic models for ALL agency programs during the CSBG Application process.

- Agency outcomes should be counted and reported from all Community Action programs and activities in the relevant program areas throughout the year using FACSPro. Check your logic models for current information.

- Each CAA should report outcomes for any national performance indicator (NPI) categories in which they have supporting programs or activities. It is not expected that all CAAs will produce outcomes for all of the national performance indicators. The agency's system administrator should setup all agency programs upon approved contract(s) or grant(s).

    - Agency programs in FACSPro must be aligned with a system program, assigned a set of tasks and interventions, program eligibility, and be identified with a funding source and grant/contract number. Each program may have several interventions that correspond to an NPI. Intervention steps are completed in FACSPro as clients are served. Those completed interventions are part of the reporting mechanism for the CSBG Annual report.

    - An alternate method for gathering and reporting program data for the CSBG Annual report in FACSPro is the mass entry module. This method can be used for programs where the agency uses another required database to collect and track information. Original source documentation must be maintained either in hard copy or electronically to verify totals reported in the CSBG Annual report.

FACSPro CSBG Annual Report Instructions

Interim Report
The system administrator can generate the CAA Annual report in FACSPro anytime during the year to preview the results.

Final Annual Report
The official final report should be created after the completion of the fiscal year.

Steps to run the CSBG Annual Report in FACSPro:
- Open FACSPro and login
- Double-Click on System Reports icon
- Click on the Other Reports tab

- Click on the CAA IS Report icon
- Click on the New button
- IS Report Name: Enter the report name
- Report Type: Select Regular
- Click the Save button
- Use the Forward and Backward buttons to move within the report
- Enter Additional Information as needed

SUBMITTAL PROCESS

CAAs may prepare and submit a 6 month (10/01/16 through 03/31/17) and must prepare a 12 month (10/01/16 through 09/30/17) CSBG Annual Report in accordance with the instructions found in this CSPM Item and CSPM 504. **CAAs must submit the reports using FACSPro, no later than:**

Friday, January 20, 2017 for the 12 month Final Report.
Friday, May 20, 2017 for the 6 month Interim Report. (Optional)

Steps to submit CSBG Annual Report to BCAEO:

- Open FACSPro and login
- Double-Click on System Reports icon
- Make sure your Organization Name is listed in the Current CAA ID text box
- Click on the Other Reports tab
- Click on the CAA IS Report icon
- Double-Click on the current report name to view
- Click the Submit button

REVISED SUBMITTAL

Steps to revise an already submitted CSBG Annual Report in FACSPro:

- Click to Unsubmit the report
- Update needed information
- Click Submit again.

NOTE: CAAs should update their report in FACSPro if any changes are requested by BCAEO.

PURPOSE

The FACS Pro Action Plan is created for customers when they are enrolled into a program within FACS Pro. This policy will identify how action plans are used to track data and assist users with case management along with how the Action Plan compiles reporting data for programs used in FACS Pro.

The Action Plan in FACS Pro includes tasks and interventions. The tasks and interventions are determined by each agency. The tasks assist users with case management by providing a check list of items that need to be completed before a customer is able to be assisted. The tasks also are created to gather additional data that may not have been entered in Customer Intake. The interventions represent the action taken to assist the person and are linked to a National Performance Indicator.

POLICY

The FACS Pro Action Plan is a key source for agencies when compiling programmatic data.

Upon completion of the Customer Intake portion of FACS Pro, the system generates a list of eligible programs, based on what the agency has set up for eligibility and has entered as customer intake, for the customer. Once an interaction is created for a customer with one of the eligible programs, an Action Plan for that customer is created for the chosen program.

Action Plan Module

All previous and current Action Plans for a customer can be seen by searching the customer and then clicking on the Action Plan module on the main screen. To see details for an Action Plan, double click on the plan you would like to view.

Plan Information Screen:

The Plan information screen lists the Action Plan Name, Dimension, System Program Name, Agency Program Name, Child Agency (if applicable) and Plan Status.

The plan status is automatically set at “In Progress” upon creation of the Action Plan. The agency is responsible for changing the Plan Status as needed. Options for the Plan Status are as follows:

> **In Progress:** This status shows that the action plan has been opened for the customer; they are enrolled to be assisted with the program, and are in the process of completing the tasks and interventions for the action plan.

Ongoing Services: This status is for programs that service a customer multiple times throughout a program year. An example of this would be Home Delivered Meals.

Completed: This status indicates a customer has been enrolled into the program and that necessary tasks and interventions have been completed to show the customer has received assistance.

Closed: This status indicates the customer was enrolled into the program but the agency was unable to assist the customer due to lack of funding or the program ended prior to services being completed for the customer. The agency should also check the "Closed but Not Completed Box" on that screen. If this is chosen as a plan status, the agency must enter a Case Note, located in the Action Plan module, listing the reason the plan was closed and the customer was unable to be assisted.

Discharged: This status indicates the customer was discharged from the program due to the customer not completing required tasks they were responsible for. Examples of this would include the customer did not submit required paperwork, or the customer did not attend a required class for the program. The agency must enter a Case Note, located within the Action Plan module, as to why the customer was discharged.

Passed/Failed: This status is not used for any BCAEO programs. These statuses were created specifically for programs that offer assistance to customers with testing requirements. Examples of this would be GED specific programs, or, programs assisting a person in taking a test to receive their driver's license.

Tasks and Interventions Screen:

The Action Plan in FACS Pro includes tasks and interventions which can be viewed within the Action Plan module by choosing Tasks and Interventions from the Action Plan menu. The tasks and interventions are determined by each agency. The tasks assist users with case management by providing a check list of items that need to be completed before a customer is able to be assisted. The tasks also are created to gather additional data that may not have been entered in Customer Intake. The interventions represent the action that was taken to assist the person and are linked to a National Performance Indicator.

When an intervention is completed this counts as a person served toward the National Performance Indicator that is linked to the intervention allowing an agency to have the ability to extract real time data for any program at any time.