

Community Services Policy Manual

1800 Series

CSST empowOR Policy

CSPM 1800

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CSPM 1800 UPDATE LOG

December 11, 2024	
1813: CSBG Annual Report	<ul style="list-style-type: none">Added CSBG Annual Report Manual Entry Section and allowable uses of manual entry in empowOR.

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EFFECTIVE DATE **April 1, 2023**
REVISED DATE **April 3, 2024**

REFERENCES

- DTMB 1340.00.020.01 Access Control Standard AC-2, and 1340.00.080.01 Identification and Authentication Standard IA-4 policies
- Access Control Standard AT-03
- Access Control Standard PS-06
- CSPMs 200, 500, 600, 900
- The Community Services Block Grant Act (42 U.S.C. 9901 et seq.) as amended
- Community Services Block Grant Agreement

1801: GRANTEE USER ROLES

SYSTEM ADMINISTRATOR

Each Grantee must have at least one System Administrator. The Grantee System Administrator responsibilities include but may not be limited to:

- Providing training to Grantee staff
- Monitoring the accuracy of data and providing agency reports and system reports to Grantee managers, boards, etc.
- Providing basic technical support such as responding to all Grantee end user requests for assistance in a timely manner
- Providing programmatic knowledge of all programs utilized in the software
- Providing Grantee program set up and maintenance
- Establishing Grantee funds/contracts/grants in the software
- Creating and verifying Grantee user access
- Referral set up
- Vendor setup and maintenance
- Responding to all requests by BCAEO including opening access to records when requested

BCAEO will provide Grantee System Administrators with a standardized method of entering any program that is overseen by BCAEO (empowOR Program Guides). System Administrators must adhere to empowOR Program Guides while entering program information for any program.

GRANTEE INTAKE STAFF

For each participant application, Grantee intake staff must obtain, enter, and verify the information collected from the participant. All documents provided by the participant must be attached to the participant record. The intake worker must complete all required fields during intake.

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Intake staff access will be identified by the Grantee's System Administrator and verified quarterly.

READ ONLY ACCESS

Except for System Administrators, all users will default to no access. The Grantee System Administrator must assign a user role to Grantee staff and grant access to appropriate grantee programs.

1802: USER ACCESS

Users are solely responsible for safeguarding their login credentials, including usernames and passwords. Under no circumstances should users disclose this information to others or permit anyone else to access the system using their login credentials. Users are accountable for maintaining the security and confidentiality of their accounts, and any unauthorized access or activity resulting from negligence in safeguarding login information may lead to appropriate consequences, including account suspension or termination.

CSST empowOR (empowOR) will be accessed using MiLogin. Access requests will generate a notification to the BCAEO.

Steps to request access:

1. Users will submit an access request in MiLogin, which will generate a notification to the BCAEO.
2. The requestor will be provided the empowOR User Security Agreement to review, sign, and return to their Grantee System Administrator. The Grantee System Administrator will submit the signed security agreement with the Data Collection Sheet to mdhhs-bcaeo@michigan.gov.
3. The BCAEO will review the signed and returned empowOR User Security Agreement and the MiLogin request on an individual basis to determine if the access should be approved or denied.
4. If a request pends for ten calendar days, the BCAEO Deputy Director will receive notification to approve or deny access in a backup capacity.

Users of empowOR will be required to sign the empowOR User Security Agreement on an annual basis.

Users of empowOR should lock their computers when not in use and when not physically present at their computers.

USER AUTHENTICATION

On an annual basis, the Bureau of Community Action and Economic Opportunity (BCAEO) will receive a user report from CSST to verify active empowOR accounts. Users with privileged accounts will be reviewed on a semi-annual basis.

A spreadsheet using the empowOR user report will be generated and maintained by BCAEO in Grantee libraries in SharePoint that have user restricted access for the Grantee's System Administrator and Executive Director. The System Administrator will verify the current status of each active user and confirm that access should continue or that access should be terminated. If access is to be terminated, the Grantee must terminate the user account(s) in the Grantee portal, and BCAEO will

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disable the user account in MILogin and send confirmation to the Grantee System Administrator.

Verifications are required to be completed within ten business days of BCAEO notification to the System Administrator. If the System Administrator is not available, the Executive Director will provide backup review to meet the ten-day requirement.

The BCAEO will use a layered approach to ensure access compliance and system security by reviewing, verifying, and approving the user report to confirm access.

USER CHANGES

If staffing changes occur between the annual report verifications, Grantees must contact mdhhs-bcaeo@michigan.gov within 24 business hours to report the change in user access, including permission status or account revocation. BCAEO will respond with any applicable changes within 24 business hours.

1803: USER TRAINING

BCAEO will make training available to all Grantees and ensure all required training is completed in a timely manner for role changes, system enhancements, refresher courses, or any other need. A training library is available online in the Michigan empowOR training portal that can be accessed 24/7/365.

Examples of trainings include, but are not limited to:

- empowOR Administrator Training Series
 - Admin 1 - managing staff, organizations, agency location(s), managed list items
 - Admin 2 - program setup, services, outcomes, work templates
 - Admin 3 - funding sources and allotments, assessments, plans/goals, item list mapping, CSBG services mapping
- State Office Training
 - Organizational Standards
 - Community Action Plans
 - Quarterly and Annual Reporting
- State Office - Train the Trainer for empowOR End Users
 - Data Entry 1
 - Data Entry 2
 - Data Entry 3/Reporting
 - Community Action Plans
- Statewide End User Training - Introduction to Data Entry in empowOR

Administrative Level User trainings will be completed in the BCAEO Learning Management System (LMS) at the time that a user with administrative access is

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granted system access and in April of each year thereafter. For access to LMS or to enroll users in training, contact mdhhs-bcaeo@michigan.gov.

Users will have 30 days to complete the initial training once it is assigned. If a user does not complete within 30 days, BCAEO will send a reminder for completion with a one-week extension. If annual training is not completed after the extension, user access will be terminated using the process identified in CSPM 1801.

1804: PURPOSE

PURPOSE

empowOR is a participant management database purchased by BCAEO for use by Grantees for conducting customer intake; establishing income eligibility; collecting and tracking data for customers; and, tracking and reporting programs, services, and outcomes for the CSBG Annual Report.

REQUIRED PROGRAMS

Grantees are required to use empowOR for all BCAEO-administered programs including, but not limited to, the following:

- CSBG Specific Assistance
- Weatherization Assistance Program
- Water Affordability
- MEAP

Note: *Grantees are encouraged to enter all programs in empowOR for reporting purposes on the CSBG Annual Report.*

1805: BCAEO USER ROLES

HELP DESK AND ASSISTANCE PROTOCOL

When a user needs assistance with empowOR, the user should contact their Grantee's System Administrator. The Grantee's System Administrator should provide preliminary technical assistance. If the Grantee's System Administrator is unable to assist and/or resolve the issue, the Grantee should contact the empowOR Help Desk via email at MDHHS-empowORHelp@michigan.gov.

BCAEO – SYSTEM ADMINISTRATOR (HELP DESK SUPPORT)

Each Grantee is encouraged to create a BCAEO System Administrator account(s) in its Grantee portal. The BCAEO System Administrator account(s) may be used on a temporary basis when given access by the Grantee to troubleshoot issues. An

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temporary access for assistance may be made inactive by the Grantee when not in use.

BCAEO System Administrator responsibilities include but are not limited to:

- Training
- Technical assistance
- Monitoring data accuracy
- Assistance with annual reporting on all agency programs

BCAEO – MONITOR – READ ONLY (BCAEO PROGRAMS ONLY)

Each Grantee must create a BCAEO Monitor(s) account in its Grantee portal. The BCAEO Monitor account(s) will be used on a temporary basis when given access by the Grantee during BCAEO monitoring engagements. BCAEO Monitor account(s) may be made inactive by the Grantee when not in use.

Grantee System Administrators should establish user permissions for BCAEO Monitor account(s) that are read only and that have access to BCAEO-administered programs.

BCAEO Monitor responsibilities include but are not limited to:

- Reviewing participant files
- Reviewing supporting documentation for participant assistance/awards
- Testing the system for accuracy and compliance
- Reviewing Organizational Standards documentation

BCAEO – WEATHERIZATION STAFF

Reserved.

1806: BCAEO PROGRAMS

POLICY

Grantees are required to use empowOR for all BCAEO-administered programs.

Except for CSBG, all BCAEO-administered programs will be setup by BCAEO and CSST and released to each CAA's portal via a plug-in. Plug-ins will include information necessary for participant eligibility, data collection, and reporting elements (such as SRVs, NPIs, and any unique reporting elements).

Grantees will not need to take action in empowOR to create or enable plug-ins. Grantee System Administrators will need to grant user permissions to appropriate end users at their CAA so that users can access all components of the plug-ins, such as work templates, forms, etc.

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BCAEO will provide empowOR Program Guides for each BCAEO-administered program that must be followed by Grantees. Program Guides will include step-by-step instructions for each BCAEO Program and can be used as a desk aid by end users.

BCAEO will provide a Program Guide for Grantees that utilize CSBG for Specific Assistance. Because CSBG is used differently from one Grantee to another, a CSBG plug-in is not feasible. Instead, Grantee System Administrators are responsible for creating their own CSBG programs in empowOR utilizing the Program Guide from BCAEO.

The CSBG Domain Tag must be used for all CSBG Specific Assistance programs in empowOR as explained in the Program Guide to ensure statewide CSBG Specific Assistance reporting can be completed accurately.

1807: DATA ENTRY

POLICY

For BCAEO-administered programs, BCAEO will establish what information is required to be entered in empowOR forms, and guidance will be provided via Program Guides.

For non-BCAEO programs in empowOR, Grantee System Administrators will establish what information is required for Grantee programs.

For non-BCAEO programs in other systems, Grantee System Administrators will establish what information and process is required for Grantee programs to be uploaded in empowOR for the CSBG annual report.

Grantees are encouraged to enter data in real time and no less than 30 days after the completion date of the service or outcome when real-time data entry does not occur (see CSPM 504).

Grantees are encouraged to collect as much participant information as is feasible for each program and participant for the CSBG Annual Report.

BASIC INFORMATION – PARTICIPANT INFORMATION

For BCAEO-administered programs, required participant information will be detailed in Program Guides, and Grantee System Administrators shall ensure required participant information is included in program setup.

For non-BCAEO programs in empowOR and other systems, Grantee System Administrators will establish what participant information is required.

BASIC INFORMATION – HOUSEHOLD INFORMATION

For BCAEO-administered programs, all household members must be entered in empowOR and added to the household (unless the program-specific CSPM item waives this requirement).

Under Household Information select the Family Type that corresponds to the household's composition and enter the household's address.

For BCAEO-administered programs, follow the appropriate CSPM for determining household composition. For example, follow the [CSPM 500 Series - CSBG](#) for CSBG and the [CSBG 600 Series - Weatherization](#) for DOE Weatherization.

For non-BCAEO programs, Grantee System Administrators will establish the participant information alignment by cross-referencing the appropriate CSPMs.

INCOME

For BCAEO-administered programs, all household income must be entered in empowOR for all household members in income snapshots (unless the program-specific CSPM waives this requirement).

A new income snapshot must be created, dated, and saved for each income assessment. Each household member's income must be entered in that household member's record using the appropriate income source.

Grantees must follow program-specific CSPMs for determining income eligibility. For example, when determining income eligibility for CSBG specific assistance, Grantee staff must follow [CSPM 500 Series - CSBG](#) to ensure the correct percent of the federal poverty line is used, the correct income sources are included/excluded, the correct lookback period is used, etc.

After all household income has been entered, dated, and saved in an income snapshot, empowOR will annualize the household's income and compute the household's poverty level.

For non-BCAEO programs, Grantee System Administrators will establish what income information is required.

BENEFITS

For BCAEO-administered programs, all household benefits must be entered in empowOR for all household members, by individual household member, in the Benefits form and linked to the correct income snapshot.

For non-BCAEO programs, Grantee System Administrators will establish what benefits information is required.

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UTILITIES

For BCAEO-administered programs that provide a utility payment on behalf of a program participant, including CSBG specific assistance, Grantees must complete the utilities form.

For non-BCAEO programs, Grantee System Administrators will establish what utilities information is required.

DOCUMENT MANAGEMENT

For BCAEO-administered programs, electronic documents must be uploaded to empowOR using the Document Management form. See 1809 for additional information electronic document requirements.

Documents in document management must be linked to specific program enrollments.

For non-BCAEO programs, Grantee System Administrators should provide guidance to Grantee staff on electronic document management.

ENROLLMENTS, SERVICES, OUTCOMES

For BCAEO-administered programs, participants must be enrolled in the program, and all SRVs, FNPIs, and program-specific outcomes must be completed with dates in the reporting period.

Program Guides will provide instructions to enroll participants and complete services (SRV) outcomes (FNPI), and program-specific outcomes. Some BCAEO programs will require additional reporting elements to SRVs and FNPIs, and these will be described in Program Guides.

For non-BCAEO programs, Grantee System Administrators should provide guidance to Grantee staff on enrolling participants and completing services and outcomes.

Participants must be enrolled in a program, and a service and/or outcome must be completed with a date to populate the CSBG Annual Report.

1808: NON-BCAEO PROGRAMS

DATA CLASSIFICATION

Grantees are responsible for ensuring non-BCAEO programs entered into empowOR comply with the data classification below. Questions can be directed to the empowOR Help Desk.

Data Classification: Confidential

Information System Security Categorization: Moderate

[1340.00.150.02 Data Classification Standard \(sharepoint.com\)](#)

1809: REQUIRED ATTACHMENTS – ELECTRONIC DOCUMENTS

POLICY

For BCAEO-administered programs, Grantees must upload all relevant and applicable source and support documentation to empowOR, including but not limited to:

- The complete participant file, including participant and CAA staff signatures when required for BCAEO-administered programs, such as CSBG and WAP.
- All source and support documentation used to determine and calculate program and income eligibility by Grantee staff, including self-declarations and documentation related to categorical eligibility.
- All source and support documentation for Income Snapshots.
- All source and support documentation for information entered in empowOR forms and/or supplemental forms (e.g., award letters to support public benefits entered in the Benefits form; utility bills to support information entered in the Utilities form).
- All source and support documentation applicable to required reporting, such as SRVs, NPIs, and other reporting elements.
- Documented phone conversations with public case workers (when applicable).
- Voucher/Purchase Order for specific assistance, including the type and dollar value of the assistance provided and documentation to support the dollar amount of assistance, such as utility bills, invoices, and/or account balance as applicable.
- Grantee board schedules, by-laws, meeting minutes, and meeting packets & materials
- All documentation related to Organizational Standards and Organizational Standards monitoring.
- Uploads for data files not stored in empowOR for the CSBG annual report.

1810: BOARD REQUIREMENTS

CSBG BOARD MODULE

Grantees must maintain board information in empowOR according to guidance provided by BCAEO.

1811: ORGANIZATIONS (PARTNERS & VENDORS)

POLICY

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Grantees must enter all partner organizations in empowOR. For BCAEO-administered programs in which Grantees make a monetary payment on behalf of a participant, vendors must also be entered in empowOR.

Grantee System Administrators can enter Partners and Vendors in Organizations > Manage Organizations.

1812: COMMUNITY ACTION PLAN (PREVIOUSLY LOGIC MODELS)

POLICY

Grantees must enter a Community Action Plan (CAP) in empowOR as part of the Grantee's annual CSBG application to BCAEO. All grantee programs must be entered in the empowOR CAP, not just those programs administered by BCAEO, and all programs must contain the target number of people to be served, Needs, Services, Outcomes, a denotation if the program is CSBG funded, and a description of the program.

The CSBG Quarterly and Annual Reports depend on accurate CAP setups, especially program targets. It is vital that Grantee System Administrators establish accurate CAPs early in each fiscal year.

CSST provides robust training materials on CAP setup and completion, and BCAEO will provide annual and ongoing technical assistance.

1813: CSBG ANNUAL REPORT (CSBG REPORTING & CSBG REPORTER)

PURPOSE

BCAEO will use empowOR to collect and compile Grantee CSBG Annual Report information, and Grantees must enter all CSBG Annual Report information in empowOR.

[CSPM 500 Series – CSBG](#) contains detailed information about CSBG Annual Reporting requirements. CSMP 1800 Series – empowOR contains information about requirements in empowOR. Grantees must follow the requirements in both CSPM series.

POLICY

Since regular CSBG annual reporting contains all community action services, strategies, and outcomes, OCS expects all funding streams to be included in the regular CSBG annual report (see CSPM 504).

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Grantees will submit all reports by the due dates as communicated by the BCAEO (see CSPM 504).

Grantees must enter all programs and targets in the empowOR Community Action Plan (see CSPM 1812), link the CAP to Grantee programs, and report Services and Outcomes from all Grantee programs for which Grantees have supporting programs and/or activities to BCAEO in empowOR. Data shall be entered in two primary ways: through live data entry or through data imports.

Grantees are encouraged to collect as much participant information as is feasible for each program and participant for the All Characteristics Report within the CSBG Annual Report (see CSPM 504).

QUARTERLY REPORT SUBMISSION

As indicated in [CSPM 500 Series – CSBG](#), grantees must use empowOR to submit the required Module 4 CSBG Quarterly Reports.

To complete quarterly reporting, Grantees shall utilize CSBG Reporting → MODULE 4 in empowOR, send the SRVs and NPIs for the appropriate reporting period to CSBG Reporter, and Submit Outcomes and Services to BCAEO from CSBG Reporter.

ANNUAL REPORT SUBMISSION

Grantees shall use empowOR to submit the CSBG Annual Report. BCAEO will conduct technical assistance prior to Grantee submission of the full CSBG Annual Report.

To complete the Annual Report, Grantees shall utilize CSBG Reporting → MODULE 2 and CSBG → MODULE 4, send the SRVs and NPIs for the appropriate reporting period to CSBG Reporter, and Submit Outcomes and Services to BCAEO from CSBG Reporter.

CSBG ANNUAL NARRATIVE REPORT

Reserved.

CSBG ANNUAL REPORT DATA CLEANUP

Reserved.

CSBG ANNUAL REPORT MANUAL ENTRY

empowOR functionality allows SRV and FNPI data to be edited manually in CSBG Reporting > Module 4. However, BCAEO preapproval is required to utilize manual entry functionality. BCAEO will consider at least the following information prior to issuing preapproval of manual entry:

1. If the Grantee is correcting an SRV or FNPI that has been entered into empowOR or imported into empowOR from another data system; the Grantee has sufficient

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source documentation to show that the correction supports an unduplicated count; and the Grantee is able to provide the support documentation to BCAEO on request.

2. The ability of the Grantee's external systems to provide unduplicated counts.
3. The ability of the Grantee's external systems and capacity to deduplicate the data between external systems and empowOR.
4. If BCAEO has pre-approved manual entry of data. (This option is restricted to highly sensitive data and is intended for a single use only. Subsequent years will not be allowed.)

Grantees shall not utilize manual entry as a type of "mass entry," i.e., a method to report SRVs or FNPIs that were not data entered into empowOR fully or imported through empowOR's import functionality.

1814: ORGANIZATIONAL STANDARDS

POLICY

BCAEO will utilize empowOR for Organizational Standards monitoring, and Grantees must upload all Organizational Standards documentation to empowOR.

BCAEO will work with Grantees to transition Organizational Standards documentation to empowOR during Fiscal Year 2024, and additional training and technical assistance will be provided after the initial empowOR rollout.

1815: WEATHERIZATION REQUIREMENTS

POLICY

Reserved.