

AFI PPR Long-Form

Fields NOT carried over from Data Report to PPR

The following sections highlight the noteworthy fields that were previously collected in the AFI annual Data Report, and will no longer be collected starting with the AFI PPR Long-Form starting for the reporting period of fiscal year 2015. The field numbers here correspond to the AFI annual Data Report. For the list of all fields that were removed, see the appendix table at the end of document.

This list can help grantees who are trying to update their forms and databases to correspond with the new AFI PPR Long-Form.

Section A – Grant and Grantee Organization Information

A.9 Organization Telephone Number

A.12 Fax Number

Section B – AFI Project Structure

B.01 Single or Network Agency

B.01a Other Description

B.02 [Grantee Organization] Agency Type

B.02a [Grantee Organization] Other Description

B.03 [Grantee Organization] Agency Budget

B.04 [Grantee Organization] Tools to manage your AFI Project

B.04a [Grantee Organization] Other Tools Used For AFI

B.05 Average Employee Hours Per Week

B.06 Average AmeriCorps Staff Hours Per Week

B.07 Average Volunteer Hours Per Week

B.08 [Single Agency Project] Recruits and Enrolls Participants

B.09 [Single Agency Project] Opens AFI IDA Accounts

B.10 [Single Agency Project] Provides AFI IDA Services from One Location Only

B.11 [Single Agency Project] Tracks Participant Account Activity

B.12 [Single Agency Project] Provides Participants With In-house Case Management

B.13 [Single Agency Project] Other Organizations Provide Case Management to AFI Participants

B.14 [Single Agency Project] Reports to OCS About the AFI Project

B.15 [Single Agency Project] Responsible for Non-Federal AFI Share

B.16 [Network AFI Project] Opens AFI IDA Accounts

B.17 [Network AFI Project] Provides AFI IDA Services From Multiple Locations

B.18 [Network AFI Project] Manages the Project Reserve Fund

B.19 [Network AFI Project] Responsible For Non-Fed AFI Share

B.20 [Network AFI Project] Responsible For Maintaining Participants' Documentation and Records

Sec B Table [Subgrantee Partners] Number of Paid Staff Hours

Sec B Table [Subgrantee Partners] Number of Volunteer Staff Hours

Comments on Section B

Section C – AFI Project Features

For all services in Section C, the PPR Long-Form does not ask for the ‘Number of Times per Year [the service] Is Offered’

- C.26 What Curriculum is Used for Financial Literacy Training?
- C.41 Structured Planning Exercises
- C.45 *Name Change, field remains.* Formerly “Cash Grant,” in PPR Long Form: “Cash Assistance”
- C.48 *Name Change, field remains.* Formerly “Credit Repair,” in PPR Long Form: “Credit Counseling”
- C.50 Specialized or Advanced Financial Education

C.51 – C.70 Sources of Funding

The new PPR has changed the options for non-federal source type to line up with the options in the Funding Opportunity Announcement.

The new PPR does not ask for the allowed uses of non-federal funded (i.e. operating expenses, match, or both).

Section D – Characteristics of AFI IDA Account Holders

- D.02 Number of Individuals Who Attended Orientation
- D.04 Number of Individuals Who Were Enrolled in the AFI Project
- D.05 Number of Individuals Who Opened and AFI IDA

- D.53 Grantee Collect Data on Location Type?
- D.54 Major Urban Area
- D.55 Minor Urban Area
- D.56 Rural/Remote Area
- D.57 Number of Account Holders in Unknown Location

Section E – AFI

- E.01 Grant Amount
 - E.02 Amount of Nonfederal Cash Contribution Pledged
 - E.03 Amount of AFI grant Drawn Down
- Comments of Section E

Section F – AFI IDA Holder Savings

- F.01 Number of AFI IDA Holder Originally Anticipated
- F.02 Current Expectation of the Number of AFI Account Holders
- F.03 Difference Between Participants
- F.04 Difference between F.1 & 2 b/c: Incomplete use of match by Account Holder
- F.05 Difference between F.1 & 2 b/c: Change in Program Features
- F.06 Difference between F.1 & 2 b/c: Terminations
- F.07 Difference between F.1 & 2 b/c: Recruitment difficulties
- F.08 Difference between F.1 & 2 b/c: Other
- F.11 Numbers of Closed Accounts for Termination
- F.13 Collect Data on Use of Direct Deposit?
- F.14 Number of Account Holders Who Have Money Electronically Transferred Into Their AFI IDA
- Sec F Table IDA Financial Institution Name
- Sec F Table Number of AFI IDAs Open at Each Institution on 9/30 of reporting period
- Sec F Table Amount of Funds in AFI IDAs At Each Institution on 9/30 of reporting period
- Comments on Section F

Section G – AFI IDA Holder Withdrawals

- G.02 Number of Home Purchase Withdrawals
- G.08 Number of Withdrawals for Education
- G.14 Number of Withdrawals for Business
- G.20 Number Withdrawals for Transfer to Dep IDA
- G.25 Number of Emergency Withdrawals
- G.26 Number of Participant Who Made Emergency Withdrawals
- G.28 Number of Unmatched Withdrawals
- Comments on Section G

Section H – Financial Information Consistency Checks

All Section H fields have been removed.

Section I – Characteristics of AFI IDA Holders Making a Matched Withdrawal in the Past Fiscal Year

All Section I fields have been removed.

Appendix: Full List of Removed Fields

Data Report Field Number	Data Report Field Name
Section A	
A.9	Organization Telephone Number
A.12	Fax Number
Comments on Section A	Comments on Section A
Section B	
B.01	Single or Network Agency
B.01a	Other Description
B.02	[Grantee Organization] Agency Type
B.02a	[Grantee Organization] Other Description
B.03	[Grantee Organization] Agency Budget
B.04	[Grantee Organization] Tools to manage your AFI Project
B.04a	[Grantee Organization] Other Tools Used For AFI
B.05	Average Employee Hours Per Week
B.06	Average AmeriCorps Staff Hours Per Week
B.07	Average Volunteer Hours Per Week
B.08	[Single Agency Project] Recruits and Enrolls Participants
B.09	[Single Agency Project] Opens AFI IDA Accounts
B.10	[Single Agency Project] Provides AFI IDA Services from One Location Only
B.11	[Single Agency Project] Tracks Participant Account Activity
B.12	[Single Agency Project] Provides Participants With In-house Case Management
B.13	[Single Agency Project] Other Organizations Provide Case Management to AFI Participants
B.14	[Single Agency Project] Reports to OCS About the AFI Project
B.15	[Single Agency Project] Responsible for Non-Federal AFI Share
B.16	[Network AFI Project] Opens AFI IDA Accounts
B.17	[Network AFI Project] Provides AFI IDA Services From Multiple Locations
B.18	[Network AFI Project] Manages the Project Reserve Fund
B.19	[Network AFI Project] Responsible For Non-Fed AFI Share
B.20	[Network AFI Project] Responsible For Maintaining Participants' Documentation and Records
Sec B Table	[Subgrantee Partners] Number of Paid Staff Hours
Sec B Table	[Subgrantee Partners] Number of Volunteer Staff Hours
Comments on Section B	Comments on Section B
Section C	
C.01	One-time Deposits
C.02	Weekly Deposits
C.6a	Minimum Amount to Open IDA Varies
C.6b	Minimum Amount Varies Explain
C.07b	Minimum Regular Deposit Varies
C.07c	Minimum Regular Deposit Varies Explain
C.08a	Max. Dollars Matched Varies
C.08b	Max. Dollars Matched Varies Explain
C.09a	Max. Number of Missed Deposits Varies

Data Report Field Number	Data Report Field Name
C.09b	Max. Number of Missed Deposits Varies Explain
C.14a	Home Purchase Match Rate Varies
C.14b	Home Purchase Match Rate Varies Explain
C.15a	Education Purchase Match Rate Varies
C.15b	Education Purchase Match Rate Varies Explain
C.16a	Business Match Rate Varies
C.16b	Business Match Rate Varies Explain
C.17a	Transfer to Dependent IDA Match Rate Varies
C.17b	Transfer to Dependent IDA Match Rate Varies Explain
C.18a	Maximum Months Participants Can Save For Home Purchase Varies
C.18b	Maximum Months Participants Can Save For Home Purchase Varies Explain
C.19a	Maximum Months Participants Can Save For Education Varies
C.19b	Maximum Months Participants Can Save For Education Varies Explain
C.20a	Maximum Months Participants Can Save For Business Varies
C.20b	Maximum Months Participants Can Save For Business Varies Explain
C.21a	Maximum Months Participants Can Save For Transfer Varies
C.21b	Maximum Months Participants Can Save For Transfer Varies Explain
C.24	Times per Year Financial Literacy Training is Offered
C.24a	Frequency of Financial Literacy Training Varies
C.24b	Frequency of Financial Literacy Training Varies Explain
C.26	What Curriculum is Used for Financial Literacy Training?
C.26a	If Other Curriculum Used, Please Explain
C.28	Times per Year Home Ownership Training is Offered
C.28a	Frequency of Home Ownership Training Varies
C.28b	Frequency of Home Ownership Training Varies Explain
C.31	Times per Year Education Training is Offered
C.31a	Frequency of Education Training Varies
C.31b	Frequency of Education Training Varies Explain
C.34	Times per Year Business Training is Offered
C.34a	Frequency of Business Training Varies
C.34b	Frequency of Business Training Varies Explain
C.41	Structured Planning Exercised Offered to AFI Participants?
C.41a	How was Structured Planning Provided? (Grantee, Outsourced, Both)
C.41b	Number of Participants Receiving Structured Planning
C.44	Other Support Services Offered to AFI Participants?
C.44a	How Other Support Provided? (Grantee, Outsourced, Both)
C.44b	Number of Participants Receiving Other Support Services
C.44c	Describe Other Support Services Offered
C.45	Cash Grants Offered to AFI Participants?
C.45a	How Cash Grants Provided? (Grantee, Outsourced, Both)
C.45b	Number of Participants Receiving Cash Grants
C.48	Credit Repair Offered to AFI Participants?
C.48a	How Credit Repair Provided? (Grantee, Outsourced, Both)
C.48b	Number of Participants Receiving Credit Repair
C.49	Other Financial Services Offered?

Data Report Field Number	Data Report Field Name
C.49a	How Other Financial Services Provided? (Grantee, Outsourced, Both)
C.49b	Number of Participants Receiving Other Financial Services
C.49c	Describe Other Financial Services Offered
C.50	Specialized or Advanced Financial Education Offered?
C.50a	How Specialized or Advanced Financial Education Offered? (Grantee, Outsourced, Both)
C.50b	Number of Participants Receiving Specialized or Advanced Financial Education
C.51	AFI Grant
C.51a	AFI Grant Details
C.52	Federal Home Loan Bank
C.52a	Federal Home Loan Bank Details
C.53	DHHS Office of Refugee Resettlement
C.53a	DHHS Office of Refugee Resettlement Details
C.54	DHHS Community Services Block Grant
C.54a	DHHS Community Services Block Grant Details
C.55	DHHS Other
C.55a	DHHS Other Details
C.56	DHUD CDBG
C.56a	DHUD CDBG Details
C.57	DHUD HOPE VI
C.57a	DHUD HOPE VI Details
C.58	DHUD Other
C.58a	DHUD Other Details
C.59	Department of Labor
C.59a	Department Of Labor Details
C.60	Local Government Funding
C.60a	Local Government Funding Details
C.61	Local Housing Authority
C.61a	Local Housing Authority Detail
C.62	Local Housing Authority FSS
C.62a	Local Housing Authorities FSS Details
C.63	Local Government Tax Credits
C.63a	Local Government Tax Credits Details
C.64	State Government Funding
C.64a	State Government Funding Detail
C.65	State Tax Credits
C.65a	State Tax Credits Details
C.66	State Welfare Program Funds
C.66a	State Welfare Program Funds Details
C.67	Public Educational Institutions
C.67a	Public Educational Institutions Details
C.68	Businesses
C.68a	Businesses Details
C.69	Civic or Fraternal Organizations
C.69a	Civic or Fraternal Organizations Details

Data Report Field Number	Data Report Field Name
C.70	Faith-Based Organizations
C.70a	Faith-Based Organizations Details
C.71	Financial Institutions
C.71a	Financial Institutions Details
C.72	Individuals
C.72a	Individuals Details
C.73	Local United Way
C.73a	Local United Way Details
C.74	Foundation
C.74a	Foundation Details
C.75	Other Funding Source
C.75a	Other Funding Source Details
Comments on Section C	Comments on Section C
Section D	
D.01	Grantee Collect Data on Number of Account Holders?
D.02	Number of Individuals Who Attended Orientation
D.04	Number of Individuals Who Were Enrolled in the AFI Project
D.05	Number of Individuals Who Opened and AFI IDA
D.06	Grantee Collect Data on Gender?
D.09	Number of Unknown Gender IDA Holders
D.10	Grantee Collect Data on Ethnicity?
D.16a	Number of Other Race IDA Holders. Please Explain
D.17	Number of Unknown Race IDA Holders
D.18	Grantee Collect Data on Age?
D.24	Number of IDA Holders of Unknown Age
D.25	Grantee Collect Data on Marital Status?
D.31	Number of Other Marital IDA Holders
D.31a	Other Marital Status Description
D.32	Number of Account Holders Unknown Marital Status
D.33	Grantee Collect Data on Employment Status?
D.39a	Other Employment Status Description
D.40	Number of Account Holders with Unknown Employment Status
D.41	Grantee Collect Data on Educational Attainment?
D.52	Number of Account Holders with Unknown Educational Attainment Level
D.53	Grantee Collect Data on Location Type?
D.54	Major Urban Area
D.55	Minor Urban Area
D.56	Rural/Remote Area
D.57	Number of Account Holders in Unknown Location
D.58	Grantee Collect Data on Adult Household Comp?
D.64	Number of Households w/ 6 Adults or More
D.65	Number of Households w/ Unknown Number of Adults
D.66	Grantee Collect Data on Child Household Comp?
D.73	Number of Households w/ 6 Children or More

Data Report Field Number	Data Report Field Name
D.74	Number of Households w/ Unknown Number of Children
D.75	Grantee Collect Data on Earned Income?
D.79	Number of Participants 200% or More of Federal Poverty Line
D.80	Number of Account Holders w/ Unknown Earned Income
D.81	Grantee Collect Data on Auto Ownership?
D.83	Number of Acct. Holders Car Owners Unknown at Enroll
D.84	Grantee Collect Data on Home Ownership?
D.86	Number of Act. Holders Home Owners Unknown at Enroll
D.87	Grantee Collect Data on Business Ownership?
D.89	Number of Act. Holders Business Ownership Unknown at Enroll
D.90	Grantee Collect Data on Recipients Of TANF?
D.92	Number of Acct. Holders Unknown For TANF
D.93	Grantee Collect Data on Recipients Of EITC?
D.95	Number of Acct. Holders Unknown for EITC
D.96	Grantee Collect Data on Part. Banking?
D.98	Number of Acct. Holders Unknown For Checking Account
D.100	Number of Account Holders Unknown For Savings Account
D.102	Number of Account Holders Unknown for Direct Deposit
D.103	Grantee Collect Data on Ant. Use of IDA?
D.108	Number of Account Holders w/ Unknown Anticipated Use of Funds
Comments on Section D	Comments of Section D
Section E	
E.01	Grant Amount
E.02	Amount of Nonfederal Cash Contribution Pledged
E.03	Amount of AFI grant Drawn Down
Comments of Section E	Comments of Section E
Section F	
F.01	Number of AFI IDA Holder Originally Anticipated
F.02	Current Expectation of the Number of AFI Account Holders
F.03	Difference Between Participants
F.04	Difference between F.1 & 2 b/c: Incomplete use of match by Account Holder
F.05	Difference between F.1 & 2 b/c: Change in Program Features
F.06	Difference between F.1 & 2 b/c: Terminations
F.07	Difference between F.1 & 2 b/c: Recruitment difficulties
F.08	Difference between F.1 & 2 b/c: Other
F.11	Numbers of Closed Accounts for Termination
F.13	Collect Data on Use of Direct Deposit?
F.14	Number of Account Holders Who Have Money Electronically Transferred Into Their AFI IDA
Sec F Table	IDA Financial Institution Name
Sec F Table	Number of AFI IDAs Open at Each Institution on 9/30 of reporting period
Sec F Table	Amount of Funds in AFI IDAs At Each Institution on 9/30 of reporting period
Comments on Section F	Comments on Section F

Data Report Field Number	Data Report Field Name
Section G	
G.02	Number of Home Purchase Withdrawals
G.08	Number of Withdrawals for Education
G.14	Number of Withdrawals for Business
G.20	Number Withdrawals for Transfer to Dep IDA
G.25	Number of Emergency Withdrawals
G.26	Number of Participant Who Made Emergency Withdrawals
G.28	Number of Unmatched Withdrawals
Comments on Section G	Comments on Section G
Section H	
H, part A	Total Reserve Deposits
H, part A	Total Match Funds Disbursed to Participants
H, part A	Calculated Reserve Balance
H, part A	Reported Reserve Balance
H, part A	Calculated Balance equals Reported Balance?
H, part A	Explain Variance
H, part B	Total Savings Deposits Ever Made by Participants
H, part B	Total Withdrawals Made by Participants
H, part B	Calculated Current Savings Balance
H, part B	Reported Total Amount IDA Funds all Institutions
H, part B	Calculated Balance equals Reported Balance?
H, part B	Explain Variance
H, part C	Total Savings Accounts Ever Opened by Participants
H, part C	Total Accounts Ever Closed
H, part C	Calculated Number of Savings Accounts Currently Open
H, part C	Reported Number of Savings Accounts Currently Open
H, part C	Calculated Number of IDAs Equals Reported Number of IDAs Open?
H, part C	Explain Variance
Comments on Section H	Comments on Section H
Section I	
I.01	Data collected on matched withdrawals?
I.02	Number of Accounts Holders Making a Withdrawal
I.03	Data Collected on Gender?
I.06	Number of Unknown Gender of Asset Purchasers
I.07	Data Collected on Race?
I.13a	Other Race Asset Purchasers Description
I.14	Number of Unknown Race of Asset Purchasers
I.15	Data Collected on Age?
I.21	Number of Unknown Age of Asset Purchasers
I.22	Data Collected on Marital Status?
I.28	Number of Other Marital Status
I.28a (missing "a")	Other Marital Status Description
I.29	Number of Unknown Martial Status

Data Report Field Number	Data Report Field Name
I.41	Number of Unknown Education of Asset Purchasers
I.42	Data Collected on Location Type?
I.46	Unknown Area
I.47	Data Collected on Household Composition?
I.54	Number of Asset Purchasers with 6+ Children
I.55	Number of Unknown Amount of Children
I.56	Data Collected on Earned Income?
I.60	Number of Asset Purchasers More Than 200 Percent of Poverty Line
I.61	Number of Unknown Income
I.62	Data Collected on Direct Deposit Usage?
I.63	Number of Asset Purchasers Using Direct Deposits
I.64	Number of Asset Purchasers Unknown Direct Deposit
I.65	Number of Direct Deposit or Similar
I.66	Number of Unknown Direct Deposit or Similar
I.67	Data Collected on Type of Asset Purchasers?
I.68	Number of Asset Purchasers Completing Home Purchases
I.69	Number of Asset Purchasers Completing Education Purchases
I.70	Number of Asset Purchasers Completing Business Purchases
I.71	Number of Asset Purchasers Completing Transfers to a Dependent's IDA
I.72	Unknown Authorized Uses
Comments on Section I	Comments on Section I