Annual Timeline for CSBG Requirements

When	Day	CSBG Requirements	Submission Information
Every month	15th	Monthly Performance & Expenditure Reports due each month. FNPIs/SRVs reconciliation at Subrecipient level Monthly reconciliation of vouchers and accounting ledgers (at Subrecipient level)	Contract system for reporting: https://contract.tdhca.state.tx.us/csea/Login.m
Throughout PY		Provide CSBG budgeted and allowable direct assistance. Track FNPIs/SRVs, consider additional SRVs/FNPIs based on customer need.	Submit email requesting to unlock additional FNPI/SRVs to report, providing contract number, FNPI/SRV, the target and send to your assigned trainer for approval.
		Budget Revisions	Submit budget revisions using updated forms on the department website: https://www.tdhca.state.tx.us/community-affairs/csbg/guidance.htm
		Report CNPIs quarterly.	Report per instructions from department email
		Update agency contact information	Upload information to: https://tdhca.wufoo.com/forms/contact-information-for-agency-staff-board/
		Request T&TA as needed.	Contact assigned trainer https://www.tdhca.state.tx.us/community-affairs/contacts.htm
		Submit to TDHCA, if applicable: Audit Certificate within 90 days of auditor's report or 9 months after end of audit period **OR** Single Audit within 30 days from audit completion or within 9 months after the end of the fiscal year.	Single Audit or Audit Certificate: saandacf@tdhca.state.tx.us
		Respond to all monitoring reports within designated time	Monitoring Staff: http://www.tdhca.state.tx.us/pmcomp/staff.htm

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January	1st week	Complete the System Access Request forms to ensure all staff who should have access do and remove any staff no longer at the agency.	Submit System Access Request to: kyla.hodges@tdhca.state.tx.us
	ASAP	Sign Contracts	http://www.tdhca.state.tx.us/ca-contract.htm
	1st	Current PY Contract start date	
		Review Performance Statement with CSBG staff	Conduct close-out for Final Report for Previous PY Monthly Expenditure and Performance Reports
	15th	Review program targets for all FNPIs with staff, enter targets from the TDHCA approved PY CAP into first monthly performance report	
		Begin working on CSBG National Survey, prepare and submit success stories per instructions received from fiscal reporting staff	See instructions for CSBG Annual Report at: https://nascsp.org/csbg/csbg-data-collection-and-reporting/csbg-annual-report/
	31st	Open up current PY OS Field Assessment Guide and prepare for uploading throughout the PY. Ensure you are using all required tools and follow the most current guide located on the department website.	Logon to OS website portal at: https://texas.orgstandards.com
February	*For Previous PY Contract:*		
		Submit Annual Report Modules	Submit Annual Report Modules 1-4: refer to the emailed instructions from Department staff
	15th	Final Performance & Expenditure Report due (45 days from contract end date)	Conduct close-out for the Final Report for Previous PY Monthly Expenditure and Performance Reports
	15th	Submit Inventory Report	Submit CSBG Inventory Report 45 days after end of contract term: elisabeth.hunter@tdhca.state.tx.us
June	1st	Community Needs Assessment **due every 3 years** and it is the responsibility of each agency to know when its next strategic plan is due to the department and submit it timely.	Upload to: https://tdhca.wufoo.com/forms/community-needs-assessment-cna/
July	31st	Submit target revision form, using the most current form located on the department website. Ensure the form is signed. Review performance on FNPI's, when variances exceed (±) 20% provide a narrative for why.	Submit Target Revision form to your assigned trainer

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September	1st	Submit Next PY CSBG Budget and Community Action Plan/Community Initiative Status form by COB. Hold Public Hearing for Next PY Budget **prior to the CAP due date.**	CAP, CIS form, and Budget submission: https://tdhca.wufoo.com/forms/cap-submission-form/
September	1st	Strategic Plan **due every five years** and it is the responsibility of each agency to know when its next strategic plan is due to the department and submit it timely.	Upload to: https://tdhca.wufoo.com/forms/agencywide-strategic-plan/
September	30th	Complete the annual Organizational Standards Field Assessment Guide documentation and uploads	Upload Org Standards: https://texas.orgstandards.com/
October	1st	Request Current PY CSBG contract extensions, if needed	Submit request to fiscal reporting staff, located on the department website: https://www.tdhca.state.tx.us/community-affairs/contacts.htm
November		Obligate all projected costs of activities, payroll, and supplies between the contract end-date and the contract close-out date.	Submit budget extensions requests to: elmis.hermosilla@tdhca.state.tx.us and copy your assigned trainer
December		Receive invoices from vendors, contractors, suppliers, etc.	Invoicing at Subrecipient level
December	31st	Contract end date	