



# **Annual Performance Report (APR) Training: Using Sage to Complete your APR**

**CoC and Recipient Training  
April 18 and 19, 2017**



# Logistics for Presentation

- Due to the high number of registrants, the phone lines are **muted**
- Please submit questions via the **“Questions and Answers”** box
- Session is being recorded and transcribed
- Materials will be posted to the HUD Exchange



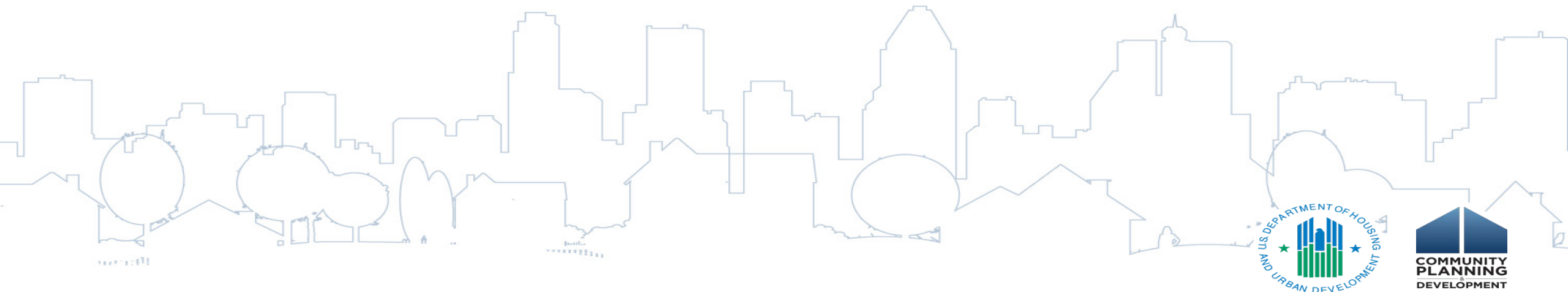
# Today's Presenters

- **Caroline Crouse**, HUD Office of Special Needs and Assistance Programs (SNAPS)
- **William Snow**, HUD Office of Special Needs and Assistance Programs (SNAPS)
- **Michelle Budzek**, The Partnership Center, Ltd.
- **Natalie Matthews**, Abt Associates Inc. (moderator)



# Learning Objectives

1. Identify what the Sage HMIS Repository is, and how it is used by CoC Program recipients to complete their APR
2. Provide a **live demonstration** of using Sage to complete your APR
3. Identify additional Sage resources and training opportunities



# Sage HMIS Reporting Repository

- Starting April 1, 2017 Sage is the new HMIS Reporting Repository that **must** be used by **all** recipients of HUD CoC homeless assistance grants to submit their APRs
- ***e-snaps*** will no longer be used for submission of the Annual Performance Report (APR)
- ***e-snaps*** will still be used for project and collaborative applications to HUD



# Benefits of Sage

- Reduced data entry burden for recipients
  - Aggregate data is imported via a **CSV-APR Report** from HMIS data
  - Pre-population of administrative and financial data from both ***e-snaps*** and eLOCCS
- Direct access to APRs by CoC primary contacts and HUD Field Office staff
- Enhanced options for running reports





# Annual Performance Report (APR) Updates

- Project-level performance data (e.g. increases in income) are now integrated into the relevant questions
- Data quality questions are now consistent with HUD's new Data Quality framework (launching April 1, 2017)
- Series of questions just on: youth, veterans and persons experiencing chronic homelessness
- Better alignment of data to calculate utilization rates



# Other APR improvements

- Project-type specific APRs:
  - HMIS Dedicated Grant APR – narrative format to enable HUD to gather information about HMIS implementations as their APR.
  - Planning Grants – Simple narrative format in Sage.
  - SRO – Simplified to basic use information, no CSV-APR upload required
- CSV-APR uploads only required for the Full APR





# Timeline for Revised APR and Sage Rollout

**September 2016:** HMIS vendors receive updated programming specs for revised APR and the CSV file

**March 2017:** Sage website opens for CoCs and recipients (grantees) to create log-in accounts

**April 1, 2017:** Sage system opens for APR submissions  
HMIS vendors must have CSV-APR Report file available



# Guidance for APRs in Progress

- All APRs that were not submitted by March 30, 2017 must be submitted in Sage
- APRs for grants funded in FY2015 and beyond will only be available in Sage
- ***e-snaps*** will remain open for any revisions or updates needed to APRs that were submitted by March 30, 2017
- If recipients need to amend old APRs they will need to talk to their HMIS Administrators to confirm what client data they can get out of HMIS



# APR Submission Steps in Sage

- Grant Information
- Bed and Unit Inventory and Utilization\*
- Contact Information
- Financial Information
- Performance Accomplishments
- Additional Comments
- CSV APR Upload
- Sign and submit

\* Not all submission steps will be viewable in Sage. For instance, a Street Outreach grant will not have the Bed and Unit and Utilization submission step.



# Live Demo of Sage



<https://www.sagehmis.info/>



# Next Steps

- Make sure that you have requested an account in Sage
- Confirm that your HMIS vendor has programmed the CSV-APR report into your database
  - This was required as of April 1, 2017
- Review trainings and guidebook on Sage, all of which are available on the Sage site under Resources
- Questions can always be submitted via the HUD Exchange Ask A Question desk—please be sure to select **Sage**



# Questions and Answers

