

NATALIE MATTHEWS: Hello, everyone, this is Natalie Matthews from Abt Associates, and I want to welcome you to HUD's training today on the Annual Performance Report, or the APR. We're going to focus today on using Sage to complete your APR, so you're going to get a little bit of content that gives you an overview of what Sage is, as well as a live demonstration of how to use the system to submit your APR. I do want to mention that if you were in attendance at yesterday's training, so the training that was held on the 18th about the APR, this is going to be the same content. So no need to repeat the content unless you're really looking for more content on the APR, we of course welcome you to stay but I do want to say up front that today's content is identical to yesterday's.

Before I turn things over to HUD to start our presentation, I just want to give a few logistical notes as well as a brief introduction to our team today. So given the large number of participants that are registered for today's session, everyone's phone lines are muted. So you won't be able to verbally ask us a question today. However, you will be able, throughout the course of today's session, to ask us a question in written form by typing it into the Questions and Answers box. You should see this on the right-hand part of your screen over to the right of the presentation. You'll see a little box towards the bottom that says Q&A, and that's where you click to type in an answer. We appreciate those questions that have come in so far, and please do continue to do that throughout the course of today's training.

I'd also like to mention that the session today is being both recorded and will be transcribed. So after today's training you will have an opportunity to share both a recording and transcription of the event, as well as the PowerPoint slide deck that we will be going through today. All of those materials, so the recording, transcription and presentation, will all be posted to the HUD Exchange website in the training section of the site. I do want to say that it normally takes a few business days to get that posted since we do again need to get everything transcribed, so please be patient and give us a few days, but we will aim to get that up on, again, the HUD Exchange website just as soon as we can.

Today's team includes Caroline Crouse of HUD's Office of Special Needs and Assistance Programs or SNAPS, as well as William Snow, who is also from the SNAPS office. In addition to Caroline and William, Michelle Budzek of The Partnership Center is going to be providing that live demonstration of Sage. And then I'll be here to take us through the beginning and the Q&A portion of today's session. The learning objectives again are to go over what the Sage HMIS Repository is and how it's used to complete your APR. We're going to again focus quite a bit on that live demonstration, and then go over some additional resources and training opportunities. You will have ample time to ask questions throughout the course of the hour together, and we really do strongly encourage you to do that. So with that, I'm going to turn things over to Caroline Crouse to take us through the beginning sections of our presentation.

CAROLINE CROUSE: Thanks, Natalie, and thanks, everyone, for joining us here this afternoon. As of April 2017, HUD requires that CoC program grant recipients must submit their APR data through the new online database that we're going to be going over today, the Sage HIMS Reporting Repository, which I'm going to call just Sage from now on. Communities will no longer be able to submit APRs on e-snaps. This change in systems will apply to all CoC homeless grants including

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The Supportive Housing Program, the Shelter Plus Care Program, Section 8 moderate rehabilitation, single room occupancy or Mod Rehab SRO, and any grants funded under the CoC program and administered by the Office of Special Needs Assistance Program. This is regardless of when they were funded. Please note it also includes legacy program grants that are under a 15 or 20 year use agreement, even if the project is no longer receiving operating grants. E-snaps is still going to be used for project and collaborative applications for the CoC applications. So e-snaps isn't going away completely; it's just going away for use with the APRs.

There are a lot of benefits for Sage. Probably the most important benefit is that it saves you a ton of time entering in data for your APR. Whereas in e-snaps you had to type in individual data points, with Sage, what you need to do is just upload a CSV-APR Report from your HMIS system. This aggregates the data and it with a few clicks of a button lets you get all of your data into your APR. One thing to please note, and I know Michelle will mention this later, but just to kind of say it myself: please make sure when you are uploading the CSV-APR Report, that you're uploading the one that says CSV-APR. This report is particular in that it aggregates the data and it takes away any personally identifying information. So it does vary from the HMIS reports that you would say upload into SSVF. And we want to make sure that you're using CSV-APR Report so you're not transmitting personally identifiable information into Sage.

Another benefit of Sage is that it pre-populates administrative and financial data from both e-snaps and LOCCS, so it's going to save you some time that way as well. Sage does allow direct access to APRs by CoC primary contacts and by the HUD Field Office staff, so they'll be able to go right in and look for the information that they need for the grantees. And there are also enhanced options for running reports in Sage, which is something that we're really looking forward to at headquarters.

There are a few updates to the Annual Performance Report questions. Now the project-level performance data is going to be integrated directly into the questions rather than having an additional stand alone question that's looking at the performance level data. The data quality questions have now also been updated with HUD's new Data Quality framework, which was launched on April 1, 2017. And probably most exciting is the ability for us to now look at kind of cross-cutting data on special populations such as youth, veterans, and persons experiencing chronic homelessness. And there is also a better alignment of data to calculate utilization rates, so it's not looking at one specific month in a calendar year, but looking over four points during the year, with a denominator that's relative to the date that's being entered.

Other APR improvements is that there are several different project-type specific APRs that are pretty seamless to the user in Sage. So there are specific APRs for HMIS dedicated grants, planning grants, and SROs. You won't need to identify these in Sage; they'll just appear in your dashboard, which you'll see when Michelle does her demo. They just appear as the type that they were funded as in your CoC application. Of these project-specific types, none of them actually require the CSV-APR upload, only APRs that don't fall into one of these project-specific types will require the CSV-APR uploads. But it does allow you to give the narrative feedback and other information that needs to be transmitted in the APR and all under the same system.

This slide just shows a basic timeline for the Revised APR and Sage Rollout. As you'll see, we're al on the last box, and we've passed it actually. As of April 1, 2017, the Sage system was open for APR submissions, and HUD required that HMIS vendors have to have a CSV-APR

Report file available. So it's been a process getting it ready but we're here and we're really excited to start getting everyone submitting their APRs in Sage.

We've gotten some questions about APRs that are already in progress. So for all APRs that were not submitted by March 30, 2017, they need to be submitted in Sage.

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The APRs for the grants funded in 2015 and beyond will only be available in Sage, so there won't be the framework to submit the grants in e-snaps any more, you'll need to do it in Sage. However, e-snaps will remain open for any revisions or updates needed to APRs that were submitted by March 30, 2017. So if you have one in e-snaps that needs some changes, you can still access those and submit them, do the final submission in e-snaps. If recipients need to amend old APRs, they'll need to just talk to their HMIS Administrators to make sure that the data that can be produced by the HMIS system conforms to the specifications of the older APRs.

And this slide is just going to show what the submission steps are in Sage, and Michelle is going to get more in detail of this in her demo. So with that, I'm going to hand over the presentation to Michelle.

NATALIE MATTHEWS: Thanks so much, Caroline. We're just working to unmute Michelle. So Michelle in case you muted your phone line, please go ahead and hit that button to unmute it. Still can't hear you, Michelle. Folks, just give us one quick second, we're going to try and figure this out.

MICHELLE BUDZEK: How about now?

NATALIE MATTHEWS: There you are, yes.

MICHELLE BUDZEK: Excellent, thank you. Sorry, folks, and you can see my screen now. Let's get started then. Sorry for the delay. Welcome to Sage. This is the Sage dashboard. Each CoC and each recipient has their own dashboard in Sage and you'll see here the CoC's dashboard. So the CoC that you're affiliated with can actually see your APRs in progress. They can see who's not started, who's working on theirs, the APR that's been submitted, if it was rejected or accepted, and then they have a few reports that they can also take a look at about users and recipients and grants within their continuum. The CoC has no ability to submit the APR for a recipient. Only a recipient may submit their APRs. So if the CoC is also a recipient, as they probably are for a planning grant, the workers there will have to affiliate themselves both with the CoC and with the entity that is the recipient – the city, the state, the non-profit – whoever it is that is the actual entity that receives the planning grant, and they would have to affiliate themselves twice. One as the CoC and then once as the recipient. When the CoC goes to submit their planning grant or try to fill out their planning grant, then they need to be sure that they're checked into the recipient dashboard, not the CoC dashboard.

If we go over to take a look at a recipient dashboard, it has essentially the same things, generally less because you're not loaded with grants unless you as the recipient are perhaps a large city or county. Then you have again your APRs not started, those in progress, and those submitted. The APRs not started do not show up on your dashboard until the end of the operating

year. So if your operating year ends at the end of this month, then on May 1st, your grant will appear here as an APR not started. You obviously can't start your APR until your grant has ended and you've spent your funds and served all the people that you needed to serve in that operating year.

To start your APR, this information would be here and you would actually click on it. I'm going to click on it as it's in progress.

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As soon as you begin the work on your APR and you save a form, it will save it and it will continue to show up in this APRs in Progress box until the time you submit it. So let's take a look at what the APR looks like here for you. The Submission Launchpad allows you to see the information that Sage has imported about your project from the systems that you've already completed information in. So it has the basic information of what this grant is, but then it's also carrying from LOCCS the operating start date and the operating end date that are set in LOCCS, and that's what's driving the reporting time period. It's giving us the financial information from LOCCS, which is exactly the amount of money that you've drawn as of the date that we pulled the LOCCS information, and the e-snaps award amount is the amount of funds that were awarded to the project.

When we go to submit our APR, we're going to go in and add – the button will say "add" if you've not started it yet – the information on this page. You'll see it's really easy, it's all questions and answers, changing the answer is really easy. If there are dependent questions, as in this one, "Is this your final APR?" then the dependent questions will show up. You'll see a number of places where there's dependent questions. You save the form and you move on, that's it. You go to the next form.

The Bed and Unit Inventory shows you what came in from your application. So in this particular grant the applicant said they were going to have 12 units with 14 beds, none of them were going to be for chronic homeless, and you can tell that there. We're going to then turn around and fill in the actual inventory, what was occupied on the last Wednesday of each one of these months, each of the quarters, and Sage is going to calculate then the occupancy rate that you had that day.

If you have questions on this page or any other page, you would press the "Help" button, and the Help button will take you right to the APR Guidebook and to the page in the guidebook that explains what you're doing on that step in the APR. So it's the actual guidebook and it's just keyed to take you right to the page that you need. So instead of printing out the guidebook and then flipping through it, we've tried to load it up for you so that it's easy.

You're going to then put in your contact information. We want to be really clear with you that the contact information is the information for the person that HUD should be calling if they have a question about this APR. So it's the person that the field office is going to pick up and call about the APR if there is issues or questions or problems with your project or your reports or your forms. It's also the person who's going to get the email that says that the APR was submitted and that the APR was approved by the field office or rejected by the field office after they've reviewed it. So it's really important that the person that's on this form is actually a person that

both knows about this grant and this project but also is able to get those emails and pay attention to what's going on there too.

The financial information is just the way in which you're going to report your finances to HUD. It's set up exactly like your grant application would have been. You're going to put in what you actually expended, you're going to put in the amount of match,

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or if you have in-kind match you can go ahead and put the in-kind or cash match in. Sage is going to add it up and going to calculate the percentage of the match for you.

We're going to take a look at the Performance Accomplishments, which are just a narrative box. You can write anything you want to in 2,500 characters and spaces that you want to tell HUD about how great your project is. What have you accomplished, what have you done, why is this project really working in your community, anything that you think is helpful for HUD to know. We don't want you to type a book so we've limited the amount of characters and spaces that you have there. There's also a box for additional comments, and that would be if anything you said you were going to do in your grant application you did not actually accomplish. You're going to write out the reason for that here. So, for example, you're a Samaritan bonus permanent housing project. You have to serve chronically homeless people. One of the people is not showing up on your APR as chronically homeless. You're going to need to describe why that is. Why the number of people that you said you were going to serve were not the same number of people as are showing up in your project. And you may have very valid reasons for that. Same thing about money. You said you needed \$100,000 and you only spent \$90,000 – HUD wants to know why. So those kinds of things are the things that you would put in here. The Close-out Certification isn't there right now, HUD will add that later, so you don't have to worry about that.

Here's the kind of fascinating part of the APR. Where you used to sit around and type in number after number after number and hit that zero a thousand times for all the forms that you had nothing on, that's no longer required. So you're going to go into your computer, you're going to select your APR that you have saved. You have downloaded and saved from your HMIS system, a CSV-APR. You're going to select the one that you need, it's right there, with whatever name you named it, and you're going to upload and test that CSV. Just that fast, Sage has looked at the CSV and has decided that it's correct, or that it has validation errors or structural errors. If it's correct, it's going to look just like this. All of the information from your project is going to be here, and the information from the validation table is going to be here, so you can see how many people are in that CSV file, just to verify that you've actually picked the right file and have the right kind of number of people, that you've picked the file with the right program associated in your system.

If for any reason your CSV-APR does not work, you're going to get an error message right there, and it's going to tell you that your CSV has failed, has a structural error in it, and that means that the file itself has not been created correctly by the vendor or whoever created your CSV. Or it has a validation error, which means that there's a programming problem in the way the APR was programmed. In general, unless you have opened that CSV file up and changed the information, the problem is with the vendor. We have asked the vendors to lock those CSV files so that you actually cannot get in there and change the information. So if you're taking a look at

that, you're really looking at what's coming out of your HMIS system, that's what HUD's looking at is what's coming out of your HMIS system and you're there. You just press Save this CSV, and Sage literally is typing in all of the fields that you need of data, which would be 2700 fields of typing that you would be doing if Sage hadn't done it for you.

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It's up, it's there. You can see it here, it's an APR for Permanent Housing.

If you for some reason uploaded the wrong thing, you can press the garbage can and delete it. Now let's say that you are an HMIS provider that also has a domestic violence partner that is not allowed to use HMIS. So they have provided you with their own CSV file from their comparable database, and you have downloaded that into your computer. You're going to come in and upload that other CSV file. You're going to upload that one and test it. There it is again, it's all right, it's perfect, and you're going to save this APR. Now you've saved two CSVs to your report. You don't have to add them together. You don't have to do anything else. You just take your CSV from the HMIS and the CSV that's coming in from the DV partner, and you put them here, and you're done. When you take a look at the front... And then you're going to see that you've actually uploaded two of these, and if you want to view it, what's going to happen is that it's going to pull up exactly the questions that were on your CSV and show you what was contained in that whole application, and you can go ahead and print that out. It comes up here with all of the questions answered in a form that you would use your browser and just go ahead and print it, either to a piece of paper, or to a PDF and save it in your system. So it's all there right for you. It will be always in Sage so you can come back to it, but it's always a good idea to print something and make sure that you have your own electronic or hard copy of the information also.

We're done completing our APR now, everything is complete, and so we're going to go in and submit our APR. All we do is say we're ready to submit, and information will come up on who's going to receive this APR. So you'll see the exact field officer or officers that it's going to go to, and you'll know who's getting the email information on the APR itself. You'll type in the authorized recipient official's name, and that is the person that's responsible for this APR. You're going to type their position in and then you're going to type in "YES". And it is with that yes that you have agreed that all of this information is true and accurate. So if you are not the person that is the authorizing official, you should not be typing this in yourself. You should have them at your computer or at their computer typing it in themselves. And they should have reviewed it prior to saying yes. That's the responsibility of the authorizing official. Once you press "SAVE", this APR is on its way to the field office. You're going to get an email telling you it was sent, and they're going to get an email telling them it was received and it's ready for review at the field office.

Let me just do one other thing, and that is to show you the resources that are available to you. The guidebook for Sage is posted on the HUD Exchange, and is also available to you inside Sage itself in your Resources tab. If you take a look, you're going to see the guidebook there and you're going to be able to print off the guidebook from here. Sage will also be loaded very soon within the next week with a variety of quick references so that some of the issues that folks have had either with the system or frequent system questions, not APR questions, would come up in here.

You're welcome to ask a question on the "Ask a Question" portal. It's still coming in under the e-snaps "Ask a Question."

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But I was told yesterday that the Sage portal in the Exchange should be ready any day, so you'll in the future have a Sage button to press so that it goes to the Sage desk. It also has links to videos. Currently there's a "Create an Account" video if you have trouble creating your account. There's also a video coming very soon about how to complete your APR. Those videos sit on the HUD Exchange but are also linked here so that you can get to them easy from Sage if you need to also. And I think that ends my presentation. Natalie?

NATALIE MATTHEWS: All right, thank you so much, Michelle. So we do understand and see that lots of questions have come in over the course of Michelle and Caroline's presentation, so what we're going to do is for the remaining half-an-hour we're going to do our best to share the most commonly asked questions and guidance that was delivered by our team to those questions just so that everyone has an opportunity to learn from one another and see what the common themes are in terms of questions about Sage. So one of the first questions that I wanted to ask our panelists to go ahead and provide an answer to, we got several questions regarding the ability to edit data in Sage. So the first part of the question is whether or not data that has been part of the CSV-APR upload process can be edited once it's been uploaded to Sage. And the second part is whether or not data that has been pre-populated from eLOCCS can also be edited or amended in any way once it's been prepopulated in the system. Michelle, do you want to take that one?

MICHELLE BUDZEK: Sure, Natalie. First of all on the CSV-APR, the expectation from HUD – and William can chime in, or Caroline too – the expectation is that it has come out of your HMIS system exactly how it's in your HMIS system, and it is not editable. So everybody that served in your project needs to be in your HMIS system and the report needs to be generated by there, and it may not be edited. Should you open and edit the file itself, you're going to run into a ton of problems.

WILLIAM SNOW: This is William; I want to add to that. This is partly because it's part of the larger data collection and reporting schema. The APR is one piece in a very large set of data, and the piece that comes to mind most readily is the system performance data. If you have data in your APR that is bad or that needs updating, well, that data also needs to be updated for all the other reports, especially your system performance reports. So that is our motive here. We want you to have the data correct for everything you do. So when you make a correction, we don't want you manually correcting your data so that you can fulfill an APR reporting requirement. That kind of misses the boat. We want to get better data overall in your local systems for local planning as well as for what you report to us.

NATALIE MATTHEWS: Great. Michelle, did you already touch on eLOCCS? Go ahead.

MICHELLE BUDZEK: In terms of eLOCCS, if the dates are wrong, there's a place to say that the dates are wrong and you can correct them. Those we found have been generally correct. If there's other information that's wrong from eLOCCS, it was put in wrong, and that takes some work with the field office. Sage itself can't fix that and does not have a direct talking relationship with LOCCS.

NATALIE MATTHEWS: Okay, great, thank you for the clarification on those. Another set of questions that we received was focused on how projects that might not be using HMIS, what they do in terms of the CVS-APR upload process. So this could include projects that use a comparable database, or one recipient wrote in saying that they're in a situation where their HMIS vendor didn't have the CVS-APR upload done in time for them to start their APR in Sage. William, or Caroline, do you guys want to take an attempt at answering that one?

WILLIAM SNOW: Yeah, it's a very good question.

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So this goes to HUD a little bit in that we haven't provided a ton of clarification around comparable databases. But there are some pieces of the comparable aspect that we do expect. One of those is, again, that the database you're using is in fact comparable to HMIS. Meaning, you're collecting the same data and have similar functionality. So we do have the expectation at HUD that every recipient will be able to fulfill the APR requirement. We are aware that not everyone will, right? That's possible that there's something going on that is preventing that. We do have provision for addressing that. However, for every instance of that we expect the recipient to have a solution for being able to submit their APR in the next cycle at least. So whatever solution we provide is intended to be a very temporary solution, and we expect, again, recipients to be able to update their systems so that they can meet the reporting requirements.

NATALIE MATTHEWS: Great, does anyone have anything to add to that piece? That was great, William, thank you. All right. I hear none, I will keep on moving. Another question that might be helpful, Michelle, to show in Sage is around – I apologize, I forge the question number now offhand because I know it's changed a little bit – but the bed and unit utilization questions. So for those we got some questions regarding two pieces of that. So one is to just affirm which portions of bed and unit utilization information is pre-populated in the system, and then secondly, where does the information for bed and unit utilization rates come from? One of the recipients that wrote in said that previously their HMIS vendor had a separate report that just pulled unit utilization information for them and that's how they entered it into e-snap. So just want to clarify two pieces on this question, both what's pre-populated and what's the data source for the bed and unit utilization information?

MICHELLE BUDZEK: So the pre-populated in Sage are always the boxes that are greyed out. So these are the pre-populated numbers, they came right from your grant application. So those are the pre-populated. The ones that you type in are down here. And you know, frankly, there needs to be a way in your HMIS for you to be able to look at your actual inventory at any point in time. In a good HIMS you're going to be able to see that without having to have a vendor

create a special report for that. HUD expects that you're able to know what's going on in your project at any kind of given time.

WILLIAM SNOW: I want to add one piece to that as well. What is brought in here, or what you see, the pre-populated piece is coming from the project application. The cells that are being entered down below in the actual inventory, that is your bed inventory. In the CSV file you have person inventory, person and household inventory. It is the person and household inventory that's being tied to the actual bed and unit inventory to generate your utilization rate. So you've got lots of pieces in the mix here. But if you're wondering how the heck is that utilization rate being calculated, it is essentially number of persons as reported through your CSV for that particular period, January let's say, divided by the number of beds, and you get the bed utilization. You do the same thing with households for units. Divide the number of households by the number of units and you get unit utilization. Again, you're pulling from your CSV export to get that person household data. You're literally manually entering your actual inventory for your bed and unit piece.

MICHELLE BUDZEK: Just to follow that up, William. In general, your total units equals your total household. And your total beds equals the total persons.

WILLIAM SNOW: Yeah, we would expect something similar to that. And it's important to note we do both the bed and the unit inventory.

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We recognize, for instance, family projects are not the same as projects for individuals. The utilization may be different. You may not fully utilize your beds, but you're fully utilizing your units. We get that concern all the time, and our response is we definitely understand that, and that's why we run both a unit and a bed inventory utilization rate.

NATALIE MATTHEWS: Great, thank you, both. Okay, I know that we've already touched a bit on the topic of what to do if you're experiencing limitations to the report coming out of HMIS, but I do want to revisit it because we are continuing to get questions or concerns from folks who are saying specifically that they have concerns about the accuracy of the programming in their system and really don't know in essence what their course of action could be. Who should they reach out to? Should they talk to HUD? Should they talk to their field office? What sort of tips could you all give to how if you're identifying issues with the reporters, you've got concerns about the accuracy of the data, what to do from the perspective of notification and remediation of the issue. Anyone want to take on that piece again?

WILLIAM SNOW: I don't mind taking a first stab, and, Michelle, if I miss any technical piece, go ahead. Whenever you have an issue with an APR you should start by contacting your field office. That should be your first place. Because they need to know, right? If they've approved an APR under one set of circumstances, and you report that something has changed, they need to be aware of that in case that flags issues for them, for better or for worse. So you should always start with that. And just recognize that the nature of the change is important. If you're doing a

change to the client data, so it impacts your aggregated client data reported, you're going to be changing your entire CSV file. You're not going to be updating a single field. It impacts everything. So that's a big deal. If you're just changing your financial information or your bed information, that's easier to change. You'll be able to go in and just change those fields that you manually answered in the first place. But again all of those have ramifications for the field review, so you should always contact your field office for those things.

MICHELLE BUDZEK: I want to just add a couple of things to what William said. I think the field office it's really important to be able to know on the HUD side, but the field office can't fix your APR. You can tell them, they're aware of it, but who could fix your APR are the people that signed the contract with the vendor, which is the HMIS lead or the CoC collaborative applicant, one of the two of those probably is who signed the contract with the vendor, and who needs to be able to address this directly then with the vendor. The HMIS systems aren't free, they cost a lot of money, and the expectation is that they work. So if you have concerns that yours doesn't, that's definitely a community discussion with your HMIS lead and collaborative applicant.

I want to encourage you, please, to go ahead and test your CSV though, bring it in. You can bring it in at the front of the system here and it doesn't attach to any APR, it just allows you to run the report and take a look at it to see if it's the right report, and to see what's wrong with it. The APR is a complicated document to actually program, so it's possible that it has errors. But the vendor should be aware of that and should have fixed it for you. It shouldn't be a big deal issue for them to be able to fix that and work it. So if you test it here and what you're seeing is an APR with a bunch of errors, that means that your vendor has not programmed it correctly, it's not validating. So by validating we mean that the number of people that the APR is counting as being served, there's a race for all of the, there's a sex for all of them, there's income for everybody that came in or everybody that exited or everybody that had an annual assessment. So all of those things are critical to be right. And those are things that if you did your data entry correctly, they're going to come out correctly if it's programmed right.

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NATALIE MATTHEWS: That's great. And it's really great that folks have that test capacity so they've got a clear documentation of the issues and can give that right back to the sys admin or vendor to sort of troubleshoot. Thanks for showing that, Michelle, that's great. One other piece that's come up a couple different ways in the questions is an item that I believe Caroline mentioned in your presentation on just sort of some of the changes to the questions. And one of the changes that was identified was the integration of performance measures now into both the income and housing related questions. So no longer having a distinct and separate set of questions about performance measures. So the question is whether or not the report also shows things like housing stability percentages, total income measure, earned income measure. Those are historically, as you guys know, what's been on the APR. I don't know, Michelle, if it would be helpful to just give a sample of where those are in the report just to orient folks to sort of where to pull it from now. So anything you want to add there?

WILLIAM SNOW: Can I just say for our perspective at HUD, we intentionally removed what was formally 36, which is where you reported on income and housing stability separately,

because that data was already in your report. So we didn't like the duplication, we felt that you already had enough to report on, you didn't need to report the same thing twice or something virtually the same. So we now include, as you can see, from what Michelle is showing us, you can get that information directly in the question that's being answered. So if you want to know about housing stability as we define it through the APR, which is Exit Destinations, you just go to the Exit Destination screen, and you look at the percent of those who exited to permanent housing destinations. You have the raw numbers there, you can generate the percent based on that. So again, it was in our head to recognize we had a long report we were providing you already and tried to reduce it where possible.

NATALIE MATTHEWS: Michelle, anything you want to add there?

MICHELLE BUDZEK: No, the tables that I showed you, the table shells will be I think online on the HUD Exchange and also in Sage, so you can kind of pull those up and see them. But they represent exactly what the information says in Sage here. And so if you go to Q23 here, you're going to see the answers to that positive destination here too.

NATALIE MATTHEWS: Okay, great, thank you. All right, so we've got a little over ten minutes left and I want to make sure that we get to the other questions that are on here. So one other question that's come up a couple different ways is how frequently the information that's prepopulated, so both the information from eLOCCS as well as any information that's prepopulated from e-stats, how frequently that is updated. Is it real time, is it quarterly? What guidance can you give to folks about the frequency of updates there?

WILLIAM SNOW: This is one of my favorite questions. Because we may not know. So we have intentions. For instance, the data from your project application, we will update that certainly before you submit your APR. So if you've made a commitment to, for instance, a certain number of units, because you're a residential project, or a certain number of beds, we will populate that from the project application. It does not need to be a real time population because you entered your data at one point in time and we scored based on that and that is the data that you're committed to. The LOCCS data, we are working right now to see how frequent we can get that. The answer right now is we don't know. What would we like? We'd love to have real time. Probably not realistic. We'd like to have nightly, which is possible, but we're running into our own issues here. The good news on that is you don't really need the eLOCCS data to submit your APR.

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It's referential, it's helpful for you, it's helpful for us, but you can still meet your reporting requirements without that piece. So we will commit to get it as frequently as possible, but you will certainly have all that you need to submit your APR by the time you need to access it.

NATALIE MATTHEWS: Great. One other thing to mention is that a few folks have asked about the ability to print APRs out of Sage as well as the ability to get reports. So one report that's been asked about is whether or not folks can get in essence a snapshot of which APRs are

due and where they are in the process. Any sort of demo that you want to give there about both how to print an APR and how to get a good overview of the status of APRs in the system?

MICHELLE BUDZEK: Let me do that, and let me also just show you that you can search for an APR by putting your grant number in and hitting "Search" and it's going to take you to the APR in the system there -- if it's really an APR and not a fake number that I put in. The information about what's coming due is right here. I would think, because we've had this question more often than not, that it would be possible to put a report on your dashboard that shows you all of your grants and all of the due dates that are in Sage. So we'll take a look at doing that here for you in a report. What was the other question, Natalie, I lost it.

NATALIE MATTHEWS: Oh, sure. It was how to print a completed APR out of the system.

MICHELLE BUDZEK: You always want to print from your browser. At this point all the browsers have a print function, so whatever browser you're using is going to allow you to print either the page or the report, and you can do that this way from here and change it if you want, but that's the browser functionality of being able to print the page itself or the report. When you're on the actual report page, if you have entered two APRs, this APR, the view of this is just going to be for this APR; this view is just for this APR that was put in, the CSV upload; and this is the combined APR where Sage has added them together. So your total APR, the combined efforts of these two show up here.

NATALIE MATTHEWS: All right, so I think that I've caught most of the questions that were asked fairly regularly through the Q&A, but I want to pause now in case anybody is looking at the Q&A and notes something else. So, William, Caroline, Michelle, anything to add for questions that should be shared more broadly?

WILLIAM SNOW: I have one. Yesterday we saw it a lot more, but there's a little bit today about access and responsibilities to submit the APR. So we structured Sage so that the CoC is the one who determines who has access for APRs that are going to be submitted for all projects in the CoC. That's an access issue. So the collaborative applicant, acting on behalf of the CoC, is the one who is authorizing users. We recommend that recipients provide a list of users and the types of rights they want their users to have, data entry rights versus submission rights, provide that list to their CoC so the CoC is aware of who they're approving. However, it is not the responsibility of the collaborative applicant to submit all the APRs. They're just supposed to get access to the recipients so that the recipients can fulfill their own APR reporting requirements. So that's something we want to make sure we're not trying to kill collaborative applicants here with massive APR workloads, that's not the intent, but we've seen some questions along those lines where people are unsure what the various roles are.

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NATALIE MATTHEWS: Any other questions for folks to add in? All right, so what we're going to do now is just get through the final couple slides to go ahead and wrap up our session for today. We just have a couple slides here. So Caroline, do you want to take the final couple

slides? I apologize, I can't recall if these were directed at you? Okay, I will go ahead and do the last couple slides so we can go ahead and wrap up today. So I appreciate all of the questions that were submitted throughout the course of the hour today, those are very helpful for all of us to see and to try to respond to. They give us a good sense of just how on or off the mark the guidance has been so far, so thank you guys for sharing all of your feedback today.

I want to share a few parting thoughts though in terms of next steps. So first and foremost, I want to make sure that everyone that needs an account within Sage have gone ahead and already requested one. So we encourage you not to wait until your APR is due or just before then to go ahead and get set up in Sage because the process is one that involves several different folks. So I encourage you to review the training that is specific to how to set up your account in Sage and to follow those steps. That training is on the HUD Exchange website and it mirrors a webinar that was presented last month as well on the same topic. So you've got a couple different ways to get that guidance. Please make sure that you go to the Sage website to connect with those resources and to start getting your account setup process going.

We also want to make sure that you take steps now to confirm that your HMIS vendor has programmed the CSV-APR report into your database. As a reminder, that was required as of April 1, 2017. So as many of you have expressed already, there may be issues with the programming, there may be questions that you have about the programming, there may be data entry errors that are showing up in the report. So please also don't wait to run that report and to make sure that you test it on the website as Michelle demonstrated for us to do.

We also want to encourage you to review the trainings in the guidebook. The guidebook is to be posted imminently. It is not currently on the HUD Exchange site, so that is going through the approval and editing process and will be up shortly. A list serve message I believe will be sent out when it's available so that folks know where to access it and can use that as their sort of go-to for information. There are a few trainings on the HUD Exchange as well as Sage right now though, so please do go ahead and make sure that you take a look at those now.

And then we also encourage you to continue asking questions. As Michelle mentioned, the Sage desk on the HUD AAQ is not yet live, but it should be live very shortly. That doesn't mean that you need to wait to ask questions. Please go ahead and do that now but use the e-snaps desk that you're all accustomed to. We've gotten a lot of questions. Michelle and her team in particular have answered hundreds of questions over the course of the last few weeks. So keep'm comin' and we'll do our best to keep up with the volume.

All right, so with that, I just want to say thank you all again for your time. We will be posting the transcription recording and slide content as soon as possible but please do give us a couple days, and we look forward to talking with you again very soon. Thanks very much and enjoy the rest of your day.

Sage Training Submitting your CoC APR-20170419 1859-1
ABT Associates
May 1, 2017
Transcript by TransPerfect