NATALIE MATTHEWS: Welcome to today's APR Training. We're going to focus today on the Sage HMIS Repository, and I know this is a hot topic for many folks. There's a lot of interest in understanding more about what Sage is and how it's going to impact you in your work as either a Continuum of Care or as a CoC Program recipient. So, hopefully today, in combination with some other resources that HUD and its team are working on, we'll go ahead and support you in that effort.

So, I'm Natalie Matthews. I'm a HUD TA provider, and I'm going to kick us off with just a few slides before turning things over to our main presenters today. I want to mention briefly a few points about logistics. So, there are many of you on the line today. We have registration requests from over 1,900 people today. And so, just about a thousand of you are on the phone lines with us now. So, because of that, we are muting everyone. We are trying to do that by hand, so that we can make sure that our presenters are able to speak. So, we may have missed a few of you, so please do all of us a quick favor and take a moment right now before we dive into the content, to just make sure that you've muted your phoneline yourself. You can do that on your phone by pressing the mute button, or by pressing star six. And that'll go a long way to making sure that we don't have any unanticipated sharing of background noise or information.

Just because the phone lines are, in fact, muted for participants, there is still an opportunity to interact with folks today. The presenters and I will have an opportunity to connect with you all via the chat message; and I see some of you using that right now, which is great. Please go ahead and if you're having technical difficulties, if you're not seeing the screen as we're sharing things, or if you're having any other challenges with the technology or with – oh, excuse me, it seems like the slide deck just went away real quickly. Alright. So, please go ahead and type that question in through that chat function, and you will have an opportunity to go ahead & to let us know what issues you're having.

So, bear with me one quick second. It looks like we've lost the slide deck, so I'm just pulling that up a different way. Okay. Alright, some folks are taking over the presenter roles. We need to stop that. So, Lily, could you please take back the presenter roles. So, we're experiencing our first technical issues right off the bat. Don't be concerned though about not being able to see everything today if we run into some additional things throughout the training today. There will be more opportunity for training. We will be recording today. We will be making the PowerPoint slide deck available to folks. So, hopefully everyone can see the PowerPoint slide deck right now, and we'll do our best to get those materials turned around within the next several business days.

Okay, so, I'm joined today by William Snow from HUD's Office of Special Needs Assistance Programs, or the SNAPS office; as well as Michelle Budzek, who is from the Partnership Center. And the Partnership Center is the developer of Sage, so we're very fortunate to have both Michelle and William here today to get us through a lot of the content.

I'm going to briefly go over the learning objectives before I turn things over to William to go ahead and talk through the first several slides. So, the learning objectives for today are listed up here on the screen right now. So, first and foremost, our priority is to get you all an overview of

what Sage is, how you'll be using it for your submission of your APR, or if you're a Continuum of Care, how'll you be potentially reviewing APRs or getting access to APRs in this way. To do that, we're going to have a few slides to go over some content, and understand again a little bit more about this transition from eSNAPS to Sage for the purposes of the APR. Once we get over those – or get through those two slides, we'll then have a live demonstration that we'll go over a few key parts of how to access Sage.

All of you right now hopefully received the list serve message that let you know about the ability to go ahead and register or set up an account for Sage. So, the demonstration of Sage by Michelle will, in part, go over that process, and maybe a few other things, to get you acclimated with those initial efforts that you'll be doing in Sage. And then, we'll also devote considerable time to questions and answers. We won't be doing that verbally. We will be relying on the chat function.

Alright, with that, I'm going to turn things over to William Snow, who is going to go over a little bit more about Sage. William?

WILLIAM SNOW: Alright. Thank you, Natalie. We're excited to host this webinar, our first webinar on Sage. This is a fun release. It's been something we've thought about for a long time, and we are excited to do it. One of the main reasons is so that we can open up some of the functionality that we have been hoping for, for the past couple of years, with regard to the APRs. We'll talk a little bit about that in the coming slides. April 1, 2017 is the kickoff date where Sage becomes repository or the place where recipients are expected to submit their APRs. So, who does that apply to? It applies to all CoC Program recipients, as well as those homeless assistance recipients from past programs, including SHP, Shelter Plus Care, and the moderate rehab – rehabilitation Single Residents Occupancy, or SRO program. All those recipients are expected to come through and start reporting in Sage starting April 1. So, a common question I've heard is, why would we do that? Why would we make people who are recipients who are submitting in eSNAPS now switch over to Sage? The core reason is that it happens at the local level, on the HMIS side, so the HMISs need to switch their own report functionality so that it will be able to meet the needs of the current APR, the one that's available in Sage. Because of this switch locally, we made it mandatory that all of the recipients switch to using Sage. So, I know we often get that question. That is the core reason.

What happens to e-SNAPS? So, no one's going to be removed from eSNAPS. We're not getting rid of access to that. However, if you have something due in e-SNAPS, and you haven't started yet, and haven't started by April 1, there is a good chance that you will not be able to get your APR data from your local HMIS to be able to complete the APR. So, there's a – that's the big driver here is again, we want to be in sync with what you have locally. So, we're requiring everybody to use Sage.

If you need to make amendments to APRs that you've submitted in the past two or three years, can you do so? The answer is yes, but to the extent that you need client information or again, any of your aggregate data about clients, you need to be able to ensure that you can get the updates you need to fulfill the submission requirement. You have to talk to your HMIS admin about how available that data would be, if you know you need to make a change. If you need to make a

change to things that don't involve client data, that's much easier. Alright, it's not going to be an issue if you need to change your finance information or other things that don't involve client data. So, yes, you can make amendments. The eSNAPS data will be – or eSNAPS options will be open indefinitely. So, if you need to look back at old APRs submitted or amend an APR from the past couple of years, you can do so. However, FY2015 funded grants, and anything after that, will never be able to submit their data in eSNAPS. We are not making it available through eSNAPS, we did not program eSNAPS to do it, so you should not be looking to eSNAPS to submit APR data for your FY2015 grants and anything later. And really, Sage should be the place you'd go from here on. It's the message we're trying to convey.

So, let's move to the next slide then. Why would we move to Sage? A couple of things. One of the biggest asks that we've received is "Why can't we import our HMIS data?" And the answer we've had to give for the past couple of years is, eSNAPS cannot handle that functionality. Our solution was to move away from eSNAPS then. Just for the purposes of your APR—we're not speaking about anything other than that, this is not impacting how you submit your applications or even fulfill your grant agreement stuff, that all remains in eSNAPS. But for your APRs, there is so much data that you're having to hand insert right now, that it doesn't make sense to continue that in eSNAPS. So, you will be using CSV imports from HMIS into Sage. This applies not only to HMIS, but it also applies to comparable databases as well. We'll talk a little bit more about that in our coming question section, but I do want to raise that here.

We do have an interface with some of the LOCCS data. We're really actually importing some LOCCS data. So, some of the financial piece will be there, if you want to see what's in LOCCS. There is not a reverse flow. You can't put information in Sage and it will return to LOCCS. For your purposes, that shouldn't matter, you don't need an interface there; but for your field office folks that interface does not exist as well. We just want to make clear the interaction between Sage and e-LOCCS.

Sage will give different access to various partners. I think the most important one is the CoC. We actually made the CoC your primary gatekeeper to get to access even to your APRs. A CoC should all have a knowledge of all the grants going on in their areas. So, to help ensure that functionality for them, recipients and their users need to go through the CoC to get access to their APRs. This also means that CoCs will be able to run reports about APRs submitted for their areas. CoCs again will be approving access for users. You at the CoC level can decide how best to accomplish that. That likely will mean having recipients identify users and let the CoC know that; but again, you can decide your own local process. But this is a very intentional move. We want to be very clear that projects are tied in every respect to the CoC. We think that's a really critical message that we want sent.

There's also a functionality that will be improved for the field offices to be able to send back APRs when they need corrections made, and to indicate whether they've approved or disapproved APRs submitted. And there's a notification system set up that lets recipients and field office users understand where the APR is at various times, right, when it's been submitted, when it's been approved, things like that. So, we're very excited about that functionality.

Next slide please. So, it's helpful just to take a minute to be clear what we're talking about with the CSV file. So, this kind of gives the summary of what you see here. It's a zipped file that's generated by your HMIS, or your comparable database. It has a lot of data, right? We went through it, it's something in the ball park of 2700 fields. It's a lot of information, and we're really happy that you don't have to hand enter that any more. But it does mean that you need to make sure your data is accurate in HMIS. This is client data, but it is not client level data sent to HUD. It will continue to be aggregate data. We will still have no access to PII or information about specific clients. But again, I wanted to emphasize that data quality piece. What will happen when you import your CSV, if there are inconsistencies such that the data won't match, you will get a notification as a recipient that says your data don't match, and it'll tell you where, right? Probably in Q3 not matching Q25, or things like that. So, you'll be notified where the problem is, but it'll be up to you to go back and ensure that you have complete records and that you have information that is supposed to be there.

So, I anticipate that this might be a little painful for the first year or so. In the past, when there were inconsistencies with HMIS data, there's been a tendency just to hand enter the data that folks think are right. We can't emphasize enough the importance of getting the data right in HMIS itself and in the comparable databases. So much of this is tied to larger things like system performance measures that we can't afford to have incorrect data there. You should expect to see more of these types of principles. We want correct data in HMIS. We will use various mechanisms to enforce that. Sage here is a good way of us pushing the importance of data quality. So, again, quite an intentional move. We're excited about it, but we know it'll have some hiccups in the first little while.

Next slide please. Alright, so, I mentioned a little bit about eSNAPS, and I want to just kind of close the loop. If you have an APR that is currently open in eSNAPS, come March 30th or March 31st and you haven't submitted, will you be able to submit? Yes, you will be able to continue to fill out anything. You're not losing any access to eSNAPS. You just have to remember if you have not yet entered your client information or the aggregate data about your clients, you need to talk to your HMIS administrators to see if you'll still be able to get that data come April 1 or whenever you think you'll be able to get it. If the answer is no, you probably should wait—wait for Sage to open, and then enter the data into Sage, the entire APR data, and submit it all through Sage. So, again, we're trying to be respectful of your needs, but also recognize – work with your HMIS. We want to make sure that we're in pretty close alignment with your functionality locally with what we're expecting through APRs.

Alright, next slide please. With the changes in Sage, we also have some other changes—some changes we've wanted to implement for some time, things that'll be more consistent. So, there are a few things we highlighted here on the screen. It's not limited to these things, but these are the big ones. We removed what used to be 236, which is the performance data for the project. Instead, you actually have questions already built into the APR that have data that fulfills this requirement. We just don't want you to double enter it. So, you have information, for instance, on change in income for your clients. Rather than having a question in Q36 about change in income, you just go to the question that's about change in income. Same with "where do people exit?" We used to ask questions on that in Q36—no longer. Because you just go to the screens

about exit destination, and you'll know where people are exiting to. So, that's just a quick – again, we're trying to streamline things to the extent possible, and that was one area where we could do so.

The data quality information has been updated. You're no longer limited to know the missing values, and don't know/refuse information. There is a little more there on what data quality is. We released some information earlier this year. This is the beginning of kind of a larger look at data quality, and expanding past this very minimalist view of don't know/refuse, and no missing values. That really is a very like 101 stand point, and it's 2017. We've been doing HMIS for a long time. It's time to up the ante a little bit on data quality.

We've also increased some of the questions around specific populations—for instance, youth, veterans and persons experiencing chronic homelessness. It's time we know a little more information at the project level. So, you'll see more questions. They're very similar to what's asked about the larger population, but we drilled down in a few specific areas to allow a little more cross-cut.

And then, finally, there's been some utilization questions and concerns that the current APR really doesn't reflect the utilization very well. So, we've updated that. We continue to have a household/unit look, as well as a beds and persons look; but, especially for those scattered sites and programs, we've allowed a point in time reflection of your inventory tied to your point-in-time reflection of persons served. So, it's a lot more apples to apples comparison in terms of utilization. We're very happy about that. We think utilization is an important principle, and this will better align it for CoCs and projects.

Next slide please. Alright, so let's quickly go over some timeline issues. September 2016, we released updates for the vendors. So, they've had this information for quite a while, and have been preparing for this change on April 1. So, they should be good to go for you on the reporting side. March—that's where we are now—we opened up Sage so that registration could occur. We want CoCs to have time to approve users, and we want users all to remember they need to go in and sign up.

Finally, April 1, 2017, we will do the official opening for submission of project level data. So, that is the timeline for the roll out. We have lots of resources that will be released as well. In the past, we had a guidebook. We will continue to do the same. We'll have a learning module, an interactive module so that you can get specific questions answered. We have a six-minute access video. If you have question, "How do I sign up?" that'll be released in the next day or so. So, we have lots of tools to help you to get up and running on Sage as soon as possible.

So, that's a quick overview of why we switched, some of the things you can expect. We're going to turn the time now to Michelle to go over a live demo, and then we'll return and open up for some questions.

NATALIE MATTHEWS: Great. Thanks so much, William. We are just working on getting Michelle that presenter ball. So, Lily, I'm wondering, could you do that? Because I don't seem to be able to see Michelle. So, it would be under Meredith.

LILY: Okay.

NATALIE MATTHEWS: Thank you.

LILY: I see her under Meredith. Okay.

NATALIE MATTHEWS: Thanks so much.

MICHELLE BUDZEK: Good afternoon everyone. While they're setting things up, this is Michelle Budzek from the Partnership Center, and I have my staff here helping me. We just – to give you – answer a couple of questions while they're setting this up and changing the screen. First this – again, this is the Sage HMIS Reporting Repository. So, it just is designed to take HMIS data and data from comparable databases into it; and it's not designed to do, again, your competition or any of the other kinds of things that you need to do in HDX or eSNAPS. It takes it in via CSV, and I saw a number of you ask while William was talking, "What's the CSV?" It's a comma, separated value file, and it is designed by the vendors to be the answers to your APR questions. It is not—I want to repeat really clearly, NOT a client level file. So, we are not taking client level data into Sage. There's two kinds of CSVs that should be coming out of your HMIS. One is a client level CSV, like you would use to submit to SSVF or for Rei. Those are client level data that's transmitting. And then, there's report level data that also transmits by CSV, and that's the data that you've been submitting for the ESG CAPER in eCart, and now that you will be submitting for the APR in Sage.

So, we're going to take you to a really quick look at how to create an account, and there we go. So, from the home page at www.sagehmis.inf, you're going to put in your contact information. You're going to select a work email address. It's really important that you use your work email, because Sage is going to email you information back and forth, and Sage is going to use this address for you on a regular basis. So, please don't put your home or your junk email address in there. You're not going to get it. And set up a password, and then select your position. If you are a CoC, you're going to select that you have – that you are the CoC, and then tell us what CoC number you are. If you're a recipient of a grant, you're going to tell us you're a recipient, and then you're going to select what the name of your recipient is. The recipients are all pre-loaded into Sage. You cannot type your own name. You have to find your name on the list, and your name is the same – appears on the list the same way it appeared in your grantee application. So, it should be the legal name of the entity that applied for and received the grant.

Here is a short video that will show you how to do – how to run Sage, and you can click there for the video. You can add multiple associations by saying you're a recipient of one agency and also perhaps you're a grant writer. And so, you're filling out multiple APRs for multiple different agencies, and so, you want affiliation with multiple agencies. And then, we encourage you to

watch that video so that you see different ways to associate yourself. The CoCs have a variety of ways that they need to associate themselves.

Sage used reCAPTCHA that is a way for the system to tell that you're not a robot or somebody trying to hack in on the system, and it comes in and asks you a question usually, and you check the boxes and answer the question, and it'll let you go through. If for some reason you can't see it or it's confusing to you, there's also an audio button on reCAPTCHA that you can use. And then you simply press "request account" and you go forward.

We're going to take you what happens when you actually will get into Sage then. So, you would put your user name and your password in. When you forgot your password, there's a place on the screen to ask for a new password at that beginning, and you'll press "forgot a password" and you go in and you're able to see your dashboard. Each organization that you're affiliated with, has a dashboard. This is a sample dashboard for a user in Alabama. That's a live user with their project all loaded in there.

NATALIE MATTHEWS: Sorry, we're getting a little background noise. Please mute your phone lines.

MICHELLE BUDZEK: Okay we –

NATALIE MATTHEWS: Someone, please mute your phone line. Okay? There's someone talking right now.

MICHELLE BUDZEK: Okay. Let's go – so, on our dashboard, what we see is any APRs that you have not started yet, any APRs that are currently in progress, and APRs that are already submitted. We're going to take a peek at what it looks like to see an APR that's in progress, just so you kind of get a handle on what that looks like. We are not going to tell you – explain to you how to complete this APR on this training. There will be other trainings that will be provided. Folks, we're going to need to ask you to mute your phones again. If everybody would just take a pause and look at your phone and mute it? Thank you.

When you look at your launch pad for your APR, what you're going to see is there's a submission status that just tells you all the things have happened to the APR thus far. It's going to show you the information that we're importing on your grant from LOCCS and from eSNAPS. And then, when you go to submit your APR, you're going to go through a series of steps. But let me just open that grant information step and show you what this looks like. So, it's really easy. It's a really simple application, and it's going to ask you questions. You're going to answer the questions. Usually there's a "yes" or a "now" or a dropdown box. If there's text box, it's a short text and it's like 2500 characters and not a big deal. There is a little tiny Help box in the corner, and if you press "Help" on any of the corner boxes, what's actually going to happen is the APR guidebook is going to open to the exact page that you're on and that you're asking for help on. So, you're going to see that when we clicked "Help" here, we went to the APR guidebook, and it explained the information, a little bit more detail on the question. So, if you

don't know what a question means, you go to that Help and it's going to hopefully tell you the answer to your question.

At the end of every page, you're going to save it and go forward. If you didn't actually fill in the answers, Sage won't let you save it. It'll fuss at you and show you in pink highlight which boxes you didn't save. You're going to upload – you're going to go through all of the questions. They're basic questions that you're used to. We're going to go to performance accomplishments, and you're going to be able to put in a short narrative about the accomplishments of your program. Again, it's a short narrative, it's 2500 characters, and it should help you—depending on the browser you use, your browser – most browsers have a spell check in them, and so, it will also spell check for you, which I know was a problem sometimes for us in eSNAPS.

When you go back, you're going to see also where we're going to upload a CSV APR. And we have the CSV APR already uploaded in one of them for you. So, we want to show you the CSV APR here and what it looks like. There you go. So, when you upload your CSV APR, it essentially brings in all of the tables that you're used to seeing. And yes, it has all of the subpopulation tables on it also. And so, all of that is going to automatically be calculated and put in Sage for you. There is no option to change data from your HMIS CSV in Sage. So, if something is wrong with your CSV data, you have to delete the CSV, correct the data in your APR, and upload a new CSV. All of the clients that are supposed to be on your APR that are to be reported to HUD are expected to be in your HMIS system. And, then, they will show up on your APR.

There is functionality within Sage when you go to upload a new APR to allow you to upload multiple APRs. So, we already have one loaded here, but should we want to upload another APR, we would be able to do that. So, if you are a grantee that uses HMIS, and you have a partner provider that is a domestic violence provider, you would upload two CSVs—your CSV from your HMIS and your CSV APR report from your comparable database—and both of them would show on the screen then; and you would attach both of those to your grant for submission to HUD. As they come up, if there's a problem with them, it will show in red to you what the problem is. And if there is a – if it's good, you will also see the project identifiers and project validators. There's an example of one that has some problems with it.

Problems with your CSV are probably not your fault. They are probably the responsibility of your vendor. So, if the CSV has a structural error, it means your vendor did not—or whoever wrote the CSV, if it's not a vendor, if it's somebody else in your community, whoever wrote the CSV has an issue with how they structured the report; and you need to go back to that person to fix it. If there is a validation error, it's also probably not because you entered bad data in your HMIS, but because the APR is not coded right. It is possible for you to have a validation error on your own only if you have somehow manipulated the CSV file; and we're asking you not to do that. And we've asked the vendors to actually lock those files so you can't do that.

There is also a Help section in Sage when it goes live, in Resources, that will have a link to the full APR guidebook. The new guidebook is really meant not exactly to be printed off, but to be used online, because it's got of links that go back and forth and attached. So, you can print it off

if you want, but you don't have to. And it's designed for you to use it kind of interactively, and you can always get to it here or from the HUD exchange. There's also some – there will be loaded in, a number of tip sheets. We have one right now that's in there that's just a tip sheet on a short guide on how you access the APR. So, it'll – how you enter an APR.

I think that is close to where we want to stop for questions.

NATALIE MATTHEWS: Yeah. I think it's a good time for questions.

MICHELLE BUDZEK: Okay, Natalie.

NATALIE MATTHEW: Very good. So, thank you so much, Michelle, that was wonderful, and it generated a lot of questions. So, William and I and Meredith, we've been keeping an eye on those questions and trying to respond to some of them. But I did write down several of them so that we could share them more generally. One thing I do want to mention quickly before we actually get into the specific questions is that there was a request from several folks about getting the link or the URL to the APR specific programming specifications. So, I did go ahead and put that in the chat message. So, everyone should be able to see that, in case they're unsure about where to get those specs and they want to make sure that locally, that everybody that needs them, including their vendor, has those.

So, we had a lot of questions come in, and I'm going to – please, if you have more questions, please don't hesitate to continue to enter them into the chat function. They're really helpful for all of us to have, to get a handle on what needs clarification. So, one of the first questions that came in was relating to several folks being uncertain about what to do in situations where they have either multiple sub-recipients or where they have, you know, one sub-recipient who might be a victim services provider, and therefore using a comparable database to get their files together. And then the other might be a, you know, non-dv or non-victim services provider. So, Michelle, I know you walked through that a little bit in Sage, but would you mind speaking a little bit more about – just sort of reiterating what to do if you've got more than one sub-recipient or if you've got a combination of both victim service providers and non-victim service providers. How would they use Sage to submit their APR?

MICHELLE BUDZEK: Sure. So, if you – first off, you should always try to combine the APR at your HMIS system to start. So, your HMIS system, many of them, most of them are able to run one report across multiple projects that are in the report. So, if you have partnership projects, there's a service provider and a housing provider, or two housing providers. You should be able to pull that out of your HMIS for one grant. If you're not, you are able to, in Sage, post as many CSV files as you need to. So, if you have five recipients and you cannot run out of your HMIS one report that un-duplicates those clients, which, at this point, we would really expect that you are able to do, because you should have been doing that all along. But if for some reason you can't, you could upload all five of those individual CSVs. Look, if you had five partners and a DV, you would update – you would upload the five partners and the DV provider. Sage will add all of those together for you, and will provide you with – you'll be able to see – if you hand us back the screen, we'll show on the – David will show you on the screen what that kind of looks

like when we have multiple APRs put together; at least how you would see, where you would see that on the screen. So, you would be able to put the multiple different CSVs in, and then it will add it up and it will show you the answer to each individual one, and the collective total for all of them. Where there are averages, it will provide a weighted average for them as they're put together, or will work out the percentages.

WILLIAM SNOW: And this William. To be clear, we are not expecting the HMISs to combine the DV data in their HMIS. So, I just want to be clear on that. We expect all the sub-recipients who are not victim service providers to really be able to be combined in HMIS, just as Michelle explained. But we don't – we continue with the prohibition of putting victim service provider data in HMIS. So, this is a good work around in that situation. We'd like to see everyone else, recipients – or sub-recipient data to be able to be aggregated in HMIS itself.

NATALIE MATTHEWS: Thank you, William. That's a great clarification. We also got several questions from providers who are victim service providers, and, as you point out, William, that don't use HMIS. And so, the question there that we received several times was, what do they do? Are they going to be able to enter the data themselves? Will their comparable database have to create a CSV file? What are the options for folks that are victim service providers and not using HMIS?

WILLIAM SNOW: Yeah, good question. So, there's two approaches here. One, we'd like to see it come from the comparable database. We'd like to see the CSV exports. We know that from the HUD side, we owe you more information about comparable databases. I will say, one of those things that we expect and we'll certainly make clear going forward is, you know, that the export functionality should be comparable to HMIS for purposes of things like this, meeting HUD's reporting requirements. So, this is one of those areas. We recognize that not everyone may be there. So, we are still working on a process. We have not completed, you know, the process for moving forward on this; but there's a few things that you will have to do. One, you'll have to be able to tell us that, right? You'll need to be able to affirmatively state, "We're not at this point able to run it because we're a comparable database and we're working on developing it." We need to know your steps for remediation, right, how are you going to be able to generate this data going forward; and we'll provide a solution on the back end. We will still expect you to provide data; and we're not, again, positive how we're doing that at this point. That's one piece we'll let you know as we release more on that, but we are certainly aware of it. It's not limited to our victim service providers, but I will say, for those who are not victim service providers, we do have an expectation to use HMIS. There's a very limited universe of grants that were funded prior to HMIS that may not be in for one reason or another, but everyone else is supposed to. And so, we have high expectations of you, and we'll, again - we'll be looking very carefully at plans to make sure you are able to generate CSV exports to fulfill your reporting requirements.

MICHELLE BUDZEK: At this point, we have a vendor call once a month for all of the HMIS vendors, and the number of the comparable databases are also on those calls. If you are operating a comparable database or working with one that is not on those calls, we would encourage you to get them to sign – to put an AAQ in the HMIS desk, and we'll get them connected with those calls.

NATALIE MATTHEWS: Okay, great. Thank you, Michelle. Okay, a couple of more points to go through, and then we'll switch over to timing and access to accounts, because those were the two other, sort of subtopics that we got a lot of questions on. So, this next question is around just sort of whether or not once you upload that CSV file, will you have an opportunity to adjust the numbers in any way? Like, let's say, you've got a situation where clients may not have agreed to have their data entered into HMIS, or you're missing data for some reason. Is there any mechanism to adjust the numbers or – sort of once you've uploaded the CSV files?

WILLIAM SNOW: I'm going to take the first crack at that Michelle. You can follow on if I miss anything. So, our expectation is that client data should be submitted in HMIS. And something again, another thing we know and we're trying to clarify is what does a consent mean? One thing that it means is consents are generally tied to sharing. If their client has denied consent, you cannot share, and you have to have a means of preventing their data from being accessed by anyone else. But, according to the 2004 Data and Technical Standards—and it still applies—that does not mean that you can't enter their information in HMIS. They may have records that are largely "don't know/refuse" responses. We understand that, and we're okay with that. Or, you might have to enter them anonymously. That's another solution that CoC's have used. But there is an expectation that clients, you should be entering some information about all of the clients that you are serving. And again, we want to be very clear what consent means; and that consent is generally about the ability to share, not about your ability as a recipient and provider to have information in the system. But you have to make sure that you have all of the controls necessary to prevent any of their information from being shared with anyone else. So, that's the big "C" there. And again, that's in the 2004 Data and Technical Standards. That stuff we – we're working now on the HMIS notices, and that will certainly be raised again, because it is so important that we have client information. But again, confidentiality is critical, we absolutely will protect the privacy. We certainly won't see it at the HUD level. Again, you will be protecting the privacy and security of clients, and that's kind of the expectation.

But, to get back to the more direct question, no, there's no going back and manipulating the data once it's submitted through the CSV format. It doesn't show up again in the system for you to go back and individually alter numbers or specific questions. So, once the client data is uploaded, you don't get a second bite of the apple there. We need all the client information there. If at this point in time, you don't have certain clients entered for one reason or another, you will not be able to manipulate the CSV, but you can use the narrative to talk about what's going on, why they're not in, and about steps to get their inclusion in the future.

NATALIE MATTHEWS: Okay. Wonderful. Thank you, William. Okay, some folks, just moving on to access question. So, one set of questions that we got, we got a few folks asking about sort of who can have access to Sage. So, in particular, several folks were wondering if because there's now a component to submitting the APR that is an upload of a CSV APR file, some folks were wondering if HMIS system administrators could have access to Sage to actually upload that file. I'm guessing this question is largely driven by situations where the responsibility of generating of that file might fall on an HMIS admin. So, any suggestions for

how folks should be handling the work flow of actually creating that CSV file? Should the grantees do that, or should it be the HMIS sys admin doing that process?

WILLIAM SNOW: That is a very good question. So, I'm going to – Michelle, you can follow along, but I want to make sure we're clear the CoC controls the users, and so if an HMIS admin from the get go wants to have access period to a specific CoC, they need to go through the CoC to get access. And then you can make your own decisions locally about how you interact or recognize that the person or the organization that is responsible for fulfilling the requirements of a grant agreement has the responsibility to submit an APR. So, if, you know, ABC organization has to submit an APR, and they allow their HMIS administrator to help them, if it is not submitted and they point their finger at the HMIS administrator, we say, "No, they're not responsible. You are responsible for submitting the APR. You will be the one held accountable." And so, I want to be absolutely clear, you can work with them to make sure everything is there, but there is also non-HMIS data to submit about expenditures. There's narrative options. And so, it really is incumbent on the recipient itself to have the final button, I guess; be the final one to push "Go" on the APR. Michelle, did I miss anything there?

MICHELLE BUDZEK: No, I think you got it.

NATALIE MATTHEWS: Alright. Wonderful, guys. And thank you. I'm trying to get through all these questions as possible, so I appreciate your willingness to jump in. So, another set of questions came in about, getting access set up accounts. So, many folks listening right now are ready to, you know, sign in and ready to get registered for an account. But it seemed as though the CoC had to first get their account set up before someone who was an agency or recipient— excuse me, before they could actually submit their account. So, should folks still go ahead and try to submit, or try to register an account now? Or should they be waiting for their CoC to notify them? But there in the system, what's the priority for folks in terms of the process for getting in?

MICHELLE BUDZEK: So, all CoCs have already been preloaded, and the primary and alternate person that was indicated on their last grant submission to HUD has already been preloaded and authorized to approve the recipients of that CoC to access Sage. So, the CoCs are ready to go. The recipients need to go in and ask for an account. Then the CoCs will get an email saying that you've asked for an account, and they will have to approve the account.

NATALIE MATTHEWS: Excellent. Okay. So, bottom line, don't wait. Please go ahead and start getting those accounts together. Another set of questions that came in was related to whether or not folks would have the ability to see the data that was submitted through the CSV upload. So, one set of questions was asking whether or not the HMIS would be programmed in a way to allow recipients to actually see what data is in that CSV file. So, in essence, to generate an APR for them to really understand what the data looks like. And then the second set of questions that we got and related to that were whether or not Sage itself would allow for grantees to have sort of a pdf or some file that showed them what data was submitted. Folks are really curious about how they're going to be able to check their data, and how they're going to be able to review it before it gets submitted into Sage. So, Michelle and William, any thoughts on that?

MICHELLE BUDZEK: Yeah, so there's a couple of things to do. First of all, before you even log into Sage with an account at www.sagehmis.inf there is a way to test your CSV, and you can bring your CSV up and test it, and you can print it out there. Likewise, - and you can do that before you've even submitted an APR, and it doesn't attach itself to your APR. If you just want to check it, that's the place to go and check it, to run it. You can use that however you want to use it. You can pull your data for a month and run CSV APR for your own organization for just a month's time. It wouldn't go anywhere. HUD doesn't see it. Nothing happens to it when you're on the front page. When you're on the back page and run an APR, you'll be able to see the APR that you submitted. You'll – if there's multiple APRs that you attached, you'll be able to see each one of those APRs. And if there's an APR that then, because you had multiple, there will be an APR that sums and totals it, you'll be able to see that total sum APR, and you can print all of those out. Or, through your browser, you can print them to pdf and save them on your system. All browsers at this point – if your browser isn't updated, you probably want to go and update your browser now. It wouldn't be a bad thing for you to do, because the new browsers will allow you to print to pdf within the browser.

NATALIE MATTHEWS: Okay, wonderful. Thanks, Michelle. Okay, a couple of folks are asking about whether or not the points of contact that are in Sage can be changed. So, one set of questions was around whether or not who is designated as the primary or the secondary for contact for the continuum of care, whether or not that can be changed. Or, you know, who's approving the accounts for recipients, whether or not that person can be changed. So, anyone want to say anything about sort of the process for changing persons that are responsible for accounts or have access?

WILLIAM SNOW: I'll take the first stab at that. Michelle, and you can follow up. So, you need to be able to first go – if you are the point of contact and you are not currently registered in eSNAPS through the competition process, right, the applicant profile; you need to update that. You should submit an AAQ as well, where's there's a Sage option now for – under the APR. And you can use that to indicate that you have a change that likely applies to many other things. We use the primary contact for many, many purposes at HUD. So, starting with updating it in eSNAPS is pretty critical, because that's your application aspect. And then just notifying the AAQ will trigger other updates. Michelle, what else am I missing there?

MICHELLE BUDZEK: The CoC can assign another person to authorize users. So, if their primary and secondary are not the people that really should be doing the authorization, then they need to give Suzie Q the permission to do that. Suzie Q goes in and registers as a user under the CoC, and then the CoC authorizes her to do that. So, you can add your own additional people to the CoCs to work on that. If the person is no longer employed at the CoC and their email was turned off, we've already deactivated their account. So, you don't have to worry about that. And if that was the only person that the CoC authorized to approve an account, we've contacted them already directly.

NATALIE MATTHEWS: Got it. Okay. Alright. So, it looks like we're getting close on time. I know that the screen is up right now, so, Michelle or Meredith, was there something that you guys wanted to show in Sage, or can we go through a couple of more questions?

MICHELLE BUDZEK: Keep going.

NATALIE MATTHEWS: Okay, you got it. So, one other question that's come in a few different times is whether or not the additional performance measures—so, as a reminder, those are the measures that an agency would set up for themselves through the application process, so things that are in addition to what HUD requires for performance measures for their grant. So, the question is, whether or not those questions, the additional performance measures would be in Sage to be entered by hand, since those, of course, are not a part of the CSV APR upload, since they're not part of the programmed report. So, Michelle or William, do you want to handle sort of how the additional performance measures are, or are not reflected in Sage?

WILLIAM SNOW: Yeah, so in this initial round, they're not there. We did not include them. They wouldn't actually be part of a CSV anyways, because they're unique as it stands. And so, no matter what, they wouldn't be included there. For those recipients who choose an additional measure, you can actually still enter that information through the narrative section. HUD will still look at the narrative, that's why it's there. You know, it's an important part for us. So, you can continue to enter there. We just found out, having a whole extra screen often didn't boost that. It could have been done through the narrative section, and so, that's the primary purpose for moving it all there.

NATALIE MATTHEWS: Great, and it looks like Michelle is showing – and Meredith are showing up on the screen now that there – there is a place for folks to enter a narrative, and that's where you can put some of that information this time around, it sounds like. So, we're getting close to time. There's just one more question that's come in several times that I do want to mention. So, folks are curious about two things that they haven't seen so far. So, one is where would fiscal information be entered? And that's a great question, so we're showing that up there on the screen right now. There is an opportunity for folks to enter that directly. So, Michelle, do you want to add more to that context about how that fiscal information's capture in Sage?

MICHELLE BUDZEK: The fiscal information is put in just like it would have been before. If sums for you and encapsulates the match percentage. So, it's a pretty easy system to use.

NATALIE MATTHEWS: Wonderful. Great. So, the point being that in addition to the CSV upload process, which is where all of your information on who you served will be captured through that upload process, there are—as Michelle was showing on her screen—several other parts to the APR that will be entered by you as the grantee. So, those are listed up there on the screen right now.

It's 4:30, so I think we should get through those last couple of slides and just give folks some more information about what other resources are coming, and what to do if you have questions, because obviously, we were not able to get through everything today, and we certainly understand there's a lot of questions that folks might have. So, perfect, okay. Alright, so we're just getting that slide deck together. We'll move on to maybe the last slide or two. So, when you get a chance, Meredith, can you move that slide forward? Awesome. Thank you.

So, William, did you want to handle these questions here, the common questions, or should we wrap up?

WILLIAM SNOW: So, given the time, we're not going to do the common questions. They were largely covered anyways. Let's move to the next step slide please.

NATALIE MATTHEWS: Wonderful.

WILLIAM SNOW: So, this is the information we largely covered already, right? Don't wait. If you are a recipient and you're wondering, "Can I get access?" go in there, register for an account. It's your – well have to work with CoCs to make sure they approve users. But if you're a recipient, there's nothing that stops you today from going and entering that. We have lots of resources that we're going to release. We have a six-minute video on creating an account. We'll release that in the next day or so. So, anybody can access it. This training will certainly be available with the slides as well. We'll post that on the HUD Exchange as soon as it is available. It'll take several days, so I would encourage you to access that video in the meantime. We'll provide further training. We talked a lot about various things you'll see in Sage today; but really, today was more of an introduction. We wanted to let you be – start to answer some of your questions, let you know how to get in, and then we're going to do more discussions going forward, and more trainings about what is the process for submitting in Sage. We hope to be able to help communities understand how to use their data a little more. We talk about that in the future. And if you have questions, as always, use the AAQ. Right now, the APR is like couched under the eSNAPS, which is kind of a funny place now that we're moving to Sage, but you'll continue to access the APR questions, and there will be different Sage questions that you can – or options that you can identify when you ask questions. So, we welcome your questions. We're grateful for them. We'll do what we can to help you get through this. We know the first several months is often the most confusing. And again, we're aware of that, and promise to be partners in getting this done. So, we thank you for joining the webinar today.

NATALIE MATTHEWS: Okay. Thanks so much everyone. Bye.

WILLIAM SNOW: Thank you.