

## ESG-CV Reporting Office Hours: Chat – December 10, 2020

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December 10, 2020 3:01 PM from Thomas Bednar to everyone:  
US Toll free +1-855-797-9485  
US Toll +1-415-655-0002  
Access code on Thursday, December 10: 178 551 7643

December 10, 2020 3:02 PM from Gaither Stephens to everyone: Hello from Southwest Florida!

December 10, 2020 3:12 PM from Megan Webb to everyone: Are we able to back and edit the reporting requirements page in Sage, such as if we need to add a category?

December 10, 2020 3:14 PM from Sarah Isaak to everyone: Can we edit the total expenditures incurred in Quarter 1?

December 10, 2020 3:15 PM from Meradith Alspaugh to everyone: @ Megan You cannot remove categories if they were reported on in a prior period. You can add additional categories.

December 10, 2020 3:16 PM from Jaini Christison to everyone: what if you did not receive expenditures in the first quarter but the project was started.

December 10, 2020 3:16 PM from William Snow to everyone: @ Sarah - hopefully, this slide answers this question. The shorter answer is yes, and this slide says how.

December 10, 2020 3:17 PM from Denise Albertson to everyone: If we award funding from round 2 and allow agencies pre-award costs back to our original start date and they utilize that ability do we have to go back and add the project to the initial report for the expenses they are asking for reimbursement for back to that initial start date?

December 10, 2020 3:17 PM from Sarah Isaak to everyone: Thank you!

December 10, 2020 3:18 PM from William Snow to everyone: @ Jaini - HUD expects you to get the financial information on projects. We know that does not always play out. The information in the last slide (slide 9) outlines how you would provide that data for the previous quarter (including financial data). But we do ask that you develop a workflow to avoid the reporting lag in the future.

December 10, 2020 3:18 PM from Meradith Alspaugh to everyone: @Denise, you do not have to edit anything with your initial report. Instead, you would add the project to your Q1 report like Michelle was demonstrating on slide 9.

December 10, 2020 3:19 PM from Angela Susten to everyone: According to the previous slide - If they started in Oct, Nov, Dec then we have to add the project to Q1? Can we just add it in Q2?

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December 10, 2020 3:20 PM from Lisa Worth to everyone: Is the project start date based on the project incurring expenses?

December 10, 2020 3:21 PM from William Snow to everyone: @ Angela - this may be a terminology issue. When we say Q1 we are not referring to the initial reporting period. We are referring to activities between October 1, 2020 through December 31, 2020. That is why Q1 would include data on projects added in Oct, Nov, and Dec. You should report the data on people served and expenses incurred in the appropriate reporting period.

December 10, 2020 3:21 PM from Meradith Alspaugh to everyone: @Angela Just to be clear, Oct, Nov, & December is Q1. so, if they started in one of those months, you add them into this Q1 report. Q2 is Jan-March

December 10, 2020 3:22 PM from Denise Albertson to everyone: The initial submission is not considered to be Q1 correct? Q1 is October-December 2020.

December 10, 2020 3:22 PM from Lee Tabor to everyone: Will this recording be made available?

December 10, 2020 3:22 PM from Angela Susten to everyone: Got it - thanks!

December 10, 2020 3:23 PM from Denise Albertson to everyone: nvm my questions - answered

December 10, 2020 3:23 PM from Meradith Alspaugh to everyone: @Denise - the initial period ended on September 30th, 2020. Q1 is October -December 2020

December 10, 2020 3:23 PM from Sarah Moore to everyone: I'm sorry if this has been asked already, if we are doing quarterly reports on financial expenditures, are we also going to have to do a YTD report also? or just each quarter?

December 10, 2020 3:23 PM from Meradith Alspaugh to everyone: @Lee, yes, we will post the recording and slides in the coming days on the HUD Exchange

December 10, 2020 3:24 PM from Laura Robertson to everyone: VSP, can they select an option indicating that they do not have an HMIS Comparable Database when they receive the link from SAGE.

December 10, 2020 3:24 PM from Christina Soulard to everyone: How should the quarterly reports address movement of funds between expenditure categories (i.e., moving funds from emergency shelter to RRH via requested amendment)?

December 10, 2020 3:24 PM from Sarah Isaak to everyone: Can expenses in the initial reporting period be edited?

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- December 10, 2020 3:24 PM from William Snow to everyone: @ Sarah - starting with this report (Q1) you will report both on the expenses/activities in the quarter as well as the expenses/activities performed for the entire grant (we use the term "cumulative" throughout the guidance)
- December 10, 2020 3:24 PM from Lesa Weikel to everyone: Is the financial data entered by project or projects combined by activity?
- December 10, 2020 3:25 PM from Sarah Isaak to everyone: Makes sense. Thanks!
- December 10, 2020 3:27 PM from Kim Murillo to everyone: Does the recipient as grant administrator need to put staff hours and expenses in Admin combined with subrecipient Admin expenses?
- December 10, 2020 3:28 PM from Meradith Alspaugh to everyone: You can find the ESG Reporting Guidance here: <https://files.hudexchange.info/resources/documents/COVID-19-Homeless-System-Response-ESG-CV-Reporting-Guidance.pdf>
- December 10, 2020 3:28 PM from Denise Albertson to everyone: If a new agency is funded in January 2021 and they are allowed to submit expenses back to the initial start date (pre-award costs) do we need to edit our initial submission to account for the additional expenses incurred by the agency?
- December 10, 2020 3:33 PM from Meradith Alspaugh to everyone: @ Denise no need to edit the initial report. Add the additional expenditures incurred into the Q1 report
- December 10, 2020 3:33 PM from Denise Albertson to everyone: Thank you! It would be a nightmare to try and keep all those edits straight!
- December 10, 2020 3:43 PM from Kelly Watson to everyone: If we have an HMIS project that was funded by ESG-CV in Q3 but then funded by FEMA in Q4, do we just not include them in the Q4 upload?
- December 10, 2020 3:46 PM from William Snow to everyone: @ Kelly - see the slides earlier on how to put an end date on a project. That will clarify if a project should or should not be included in a bundle.
- December 10, 2020 3:47 PM from Kelly Watson to everyone: Thanks, had to log on late due to a conflict.
- December 10, 2020 3:47 PM from Kelly Watson to everyone: I'll take a look at them when they are sent out
- December 10, 2020 3:48 PM from Danielle Meister to everyone: If an error is in the project list but the HMIS Lead does not notify the recipient within the lockdown window (before uploads are allowed), is there a way to only edit one HMIS Lead's bundle/project list - in lieu of deleting and resending all bundles (which restarts the lockdown window)?

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December 10, 2020 3:51 PM from Sergio Santiago to everyone: Hey, saw on the bundle slide that bundles should be the same component and have the same operating dates. Does this mean that the same components with different start dates should not be bundled? Thanks!

December 10, 2020 3:51 PM from Jessica Izquierdo to everyone: Is there any way that more than one person can be sent the email from SAGE (the email that requests an agency to check and be sure of projects and to later upload into for SAGE)? We had several situations where the one person SAGE sent the email to was out of the office for more than a week due to COVID and other staff members could not access that email to do the work.

December 10, 2020 3:52 PM from Meradith Alspaugh to everyone: @Sergio that's right. Keep in mind though that you don't have to make the decision about what gets added to a bundle. So long as the start dates are accurately recorded, Sage will assign the right projects to the right bundles.

December 10, 2020 3:54 PM from Lesa Weikel to everyone: I saw something that said there is a quarterly and cumulative reporting - will the HMIs data have to be submitted for the quarter only and then a cumulative as well?

December 10, 2020 3:54 PM from William Snow to everyone: @ Lesa - both (the quarter and cumulative)

December 10, 2020 3:54 PM from Meradith Alspaugh to everyone: @Jessica, only one email can be recorded in Sage for the HMIS or VSP. However, on the HMIS Lead or VSP end, they can set up a generic email address or distribution list that goes to multiple people.

December 10, 2020 3:55 PM from Lesa Weikel to everyone: @williamsnow - thank you!

December 10, 2020 3:56 PM from Jessica Izquierdo to everyone: @Meradith - Thank you! We had that problem with our VSPs, so the idea to have them set up a generic email address or distribution list that goes to multiple people is something we can do to avoid this issue again. It's not fun un-bundling to fix it all.

December 10, 2020 3:56 PM from Danielle Meister to everyone: @michelle, thanks! we will do a pre-check of project lists ahead of sending through SAGE, but helps to know the "what-ifs"

December 10, 2020 4:00 PM from Paula Dewey to everyone: Once files have been loaded by the HMIS lead, is there any way to replace those files with new ones without unbundling and submitting an AAQ to have files removed? There were several cases where client data was entered after the reports were pulled and loaded. There didn't seem to be a way to just replace the files with the new ones.

December 10, 2020 4:03 PM from Paula Dewey to everyone: In these cases, client data was entered after the upload was done. There wasn't an issue with the projects - the numbers changed and required a new upload.

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December 10, 2020 4:05 PM from Lesa Weikel to everyone: are expenditures reported as all CV funding regardless of if it was CV-1 or CV-2?

December 10, 2020 4:06 PM from Lee Tabor to everyone: And this financial report is what the grantee completes for all agencies funded/HMIS CoC Leads? OR is this what the CoC leads are putting together?

December 10, 2020 4:06 PM from Lesa Weikel to everyone: Thank you!

December 10, 2020 4:06 PM from Scott Gloden to everyone: @ Paula, in the situation you're describing, it will still require contacting the AAQ desk to have those bundles removed, so a new file with the correct numbers can be reflected.

December 10, 2020 4:07 PM from Paula Dewey to everyone: Thank you.

December 10, 2020 4:07 PM from Jaini Christison to everyone: Do we complete finance portion prior to bundle? Asking because do not get finance reports until 15th.

December 10, 2020 4:08 PM from Lee Tabor to everyone: I am a State (WV). If I know these details already by way of what we have reimbursements for expenses, then I can complete this report.

December 10, 2020 4:08 PM from Lee Tabor to everyone: Thank you!

December 10, 2020 4:09 PM from Sarah Isaak to everyone: This has been extremely helpful! Thank you!

December 10, 2020 4:10 PM from Kim Murillo to everyone: Great information - thanks everyone!

December 10, 2020 4:11 PM from Christina Soulard to everyone: Thank you!

December 10, 2020 4:11 PM from Meradith Alspaugh to everyone: Thanks everyone!