

## ESG-CV Reporting Requirements Overview (City/County): Chat and Q&A August 25<sup>th</sup>, 2020

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August 25, 2020 from Nicole Waters to host (privately): 2:59 PM I can't hear anything either.

August 25, 2020 from Treasure Sheppard to host (privately): 3:00 PM Will the slides and a recording of the training be available to attendees in the future?

August 25, 2020 from Amanda Cordova to everyone: 3:02 PM I do not see any other participants besides myself

August 25, 2020 from Meghan Raftery to everyone: 3:03 PM Hello - we have staff that have signed up for the State calls and have not received anything back, so they don't have links for any of the calls

August 25, 2020 from Abt Associate to everyone: 3:03 PM Please change the TO box in chat to Everyone It's at the bottom of the list.

August 25, 2020 from Clarice Redding Louis to everyone: 3:03 PM Hello! Will this recording be sent out after today?

August 25, 2020 from Natalie Matthews to everyone: 3:04 PM Hi Clarice! It will be posted to the HUD Exchange

August 25, 2020 from Diana Trejo to everyone: 3:04 PM Will HUD be releasing a notice on ESG-CV funding soon?

August 25, 2020 from Clarice Redding Louis to everyone: 3:05 PM Thank you Natalie!

August 25, 2020 from Samantha Carpio to all attendees: 3:04 PM What's the time frame?

August 25, 2020 from Judy Gillaspie to everyone: 3:06 PM We are working on completing our PY19 CAPER. This is where we did our amendment. Do we report ESG-CV in that CAPER?

August 25, 2020 from Marlisa Grogan to everyone: 3:06 PM @Samantha - The expenditure deadline information will be included in the ESG-CV notice. Please stay tuned!

August 25, 2020 from Hailey Cragun to everyone: 3:06 PM Any direction for DV shelters who do not use HMIS?

August 25, 2020 from Tommy Phillips to all attendees: 3:09 PM will our HMIS lead allocate more funds over and beyond our annual our HMIS costs

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August 25, 2020 from Christopher McGadney to everyone: 3:11 PM Will the PP slides be available at the end of the webinar?

August 25, 2020 from Tommy Phillips to all attendees: 3:10 PM SAGE will have separate 2019 and 2020 plus CSV

August 25, 2020 from William Snow to everyone: 3:11 PM @ Diana - RE: ESG Notice. There is no update at this point. We are trying to release it as soon as possible.

August 25, 2020 from Rikki Gardner to everyone: 3:12 PM Did Michelle say that the subrecipients are not responsible for the quarterly reporting? Only the recipient is responsible for the quarterly reporting?

August 25, 2020 from William Snow to everyone: 3:12 PM @Judy - RE: ESG-CV Reporting. The ESG-CV reporting will be separate from other ESG reporting years. We have not opened up Sage yet to reflect the ESG-CV reporting, but it will be available in the coming weeks.

August 25, 2020 from Tiffany Glasper to everyone: 3:13 PM Is that October date supposed to be 2020 and not 2021?

August 25, 2020 from Lynn Suchwalko to everyone: 3:13 PM Should that due date be 2020 and not 2021?

August 25, 2020 from Katie Cahill-Holloway to everyone: 3:13 PM can you clarify due date, 10/30/20 or 10/30/21?

August 25, 2020 from Develyn Rhodes-Johnson to everyone: 3:13 PM Are ESG-CV funds subject to FSRS reporting requirements?

August 25, 2020 from Teena Willis to all attendees: 3:11 PM If we currently have an account in SAGE for other funding, we don't need to create a separate account correct?

August 25, 2020 from Marlisa Grogan to everyone: 3:14 PM @Develyn - yes, ESG-CV funds are subject to FSRS reporting

August 25, 2020 from Kellie Engelman to all attendees: 3:13 PM Do you need to do the reporting prior to grant agreement received?

August 25, 2020 from William Snow to everyone: 3:14 PM @Rikki - the recipient is always primarily responsible for reporting. However, under normal ESG the subrecipient submits the CSV file for their projects. In this case, the HMIS lead will do that submission. The only subrecipients

## ESG-CV Reporting Requirements Overview (City/County): Chat and Q&A August 25<sup>th</sup>, 2020

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that will be submitting CSV files are the victim service providers. They will not be combining their data with HMIS or with other projects.

August 25, 2020 from Anjala Huff to all attendees: 3:13 PM  
Is that for October 2020?

August 25, 2020 from Kailee Van Brunt to all attendees: 3:13 PM  
On slide 11 should the due date be 2020 or 2021

August 25, 2020 from Meradith Alspaugh to all attendees: 3:13 PM  
That was a typo - the due date for the initial submission is October 30, 2020

August 25, 2020 from Beverly Johnson to all attendees: 3:14 PM  
Will you make this presentation available to all participants?

August 25, 2020 from KIANA HARRISON to everyone: 3:14 PM The initial submission is for what operation dates?

August 25, 2020 from William Snow to everyone: 3:15 PM @tiffany, Lynn, and Katie - the 10/30/21 was part of a larger example.

August 25, 2020 from Cicely Henderson to everyone: 3:15 PM Will the slides be available to us after the meeting?

August 25, 2020 from Meradith Alspaugh to all attendees: 3:15 PM  
@Kiana, that is what Michelle is describing now

August 25, 2020 from William Snow to everyone: 3:16 PM The first quarterly report will be due 10/1/2020. It will be based on all housing/services provided up to 9/30/20.

August 25, 2020 from Jennifer Wenger to all attendees: 3:16 PM  
acronyms?

August 25, 2020 from William Snow to everyone: 3:17 PM @ Teena - if you have a current Sage account you do not need to create a new account for ESG-CV

August 25, 2020 from Senna Adjabbeng to everyone: 3:17 PM What are reporting options for DV programs that do not use HMIS?

August 25, 2020 from William Snow to everyone: 3:17 PM @ Kellie - we will address the timing of submission for different scenarios (based on where you are with grant agreements and spending)

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August 25, 2020 from Meradith Alspaugh to all attendees: 3:18 PM  
@Senna, VSPs will generate their reports from their comparable database. Michelle will discuss in more detail later in the presentation

August 25, 2020 from Amanda Best to everyone: 3:19 PM IS the start date the date that we release funding to subrecipients, or can it be before that if we do backpay?

August 25, 2020 from Senna Adjabeng to everyone: 3:19 PM Ok, thank you.

August 25, 2020 from Courtney Cross to everyone: 3:19 PM Does this reporting apply to subrecipients receiving ESG-CV funding from a state agency?

August 25, 2020 from Tami Bailey to all panelists: 3:20 PM How long is the period of performance - there hasn't been good direction regarding the time period for setting these projects up and the period of time for expending the money and drawing it down

August 25, 2020 from Kailee Van Brunt to all attendees: 3:19 PM  
Do we need to report if we don't even have grant agreements signed with HUD yet?

August 25, 2020 from Tami Cole to everyone: 3:20 PM What if you currently have projects (homeless prevention and rapid rehousing, shelter). We don't have to have a special project for the ESG CV correct?

August 25, 2020 from Liz Mengers to everyone: 3:23 PM What is the definition of expenditure in this context? LOCCS draw?

August 25, 2020 from Modesta Putla to presenter: 3:24 PM Hello, we usually send the SAG link to our sub recipients to submit the annual HMIS data directly. Are you suggesting that this new system I (city) has to submit the HMIS data of our subrecipients? Please advise-Modesta

August 25, 2020 from Modesta Putla to host & presenter: 3:24 PM \*SAGE

August 25, 2020 from Wendy Smith to all attendees: 3:22 PM  
So, this is not a theoretical workflow but transaction in Sage, correct (Slide 15)

August 25, 2020 from William Snow to everyone: 3:24 PM @ Courtney - RE: State subrecipients. This same set of reporting requirements applies to all ESG recipients (including states). This means that the data from projects in a single project type will all be aggregated (or bundled) in HMIS - so the subrecipient will not have to generate a CSV. That will be a responsibility of the HMIS Lead. But victim service providers will be the exception - they will continue to run their own CSV files and submit those to HUD.

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August 25, 2020 from Marlisa Grogan to everyone: 3:25 PM @Liz, 'expenditures' for the ESG program are explained in the regs at 24 CFR 576.202(b) - its' an actual cash disbursement for a direct charge for a good or service or an indirect cost or the accrual of a direct charge for a good or service...it's essentially an incurred costs

August 25, 2020 from Eunyoung Cho to everyone: 3:25 PM What was reporting like for ESG before this?

August 25, 2020 from William Snow to everyone: 3:26 PM @Tami - RE: period of performance. That will be clarified with the Notice. However, you are able to reimburse for costs back to January 21, 2020 that are tied to your COVID-19 response efforts.

August 25, 2020 from Meradith Alspaugh to all attendees: 3:25 PM @Tami, you need to set up new projects in HMIS for ESG-CV funded HP and RRH projects. Check out the ESG HMIS Program Manual for additional project setup guidance

August 25, 2020 from Marlisa Grogan to everyone: 3:26 PM @Tami - the expenditure requirements will be defined in the ESG-CV Notice

August 25, 2020 from Kathy Williams to all attendees: 3:25 PM How do we combine DV with comparable with "normal HMIS" for one report?

August 25, 2020 from Katherine Reeves to all attendees: 3:26 PM will this power point be available to print?

August 25, 2020 from Tami Cole to everyone: 3:27 PM What if we used a temporary shelter for social distancing. They have floors and walls, but they are only going to open until COVID-19 ends. That still is a temporary shelter.

August 25, 2020 from Carolyn Noble to all attendees: 3:26 PM does the PJ or the Subrecipient enter into HMIS?

August 25, 2020 from Sable Flewellen to everyone: 3:27 PM Will the slide show presentation be available to attendees after the seminar? Thank you.

August 25, 2020 from William Snow to everyone: 3:27 PM @Kailee - if you have not signed a grant agreement you will not have to report yet. But if you have signed a grant agreement you will have to do some level of reporting (even if you have not spent funds yet). That is covered in the slides.

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August 25, 2020 from Angela Susten to all attendees: 3:27 PM  
We are the recipient and the HMIS lead, what if we have sub-recipients that use a different HMIS system. Will they submit their own reports in Sage?

August 25, 2020 from Denise Cloward to all attendees: 3:28 PM  
Can you please speak to Hotel/motel vouchers regarding shelter costs?

August 25, 2020 from Chris Davis to everyone: 3:28 PM Can you please clarify who is responsible for reporting? Is it the HMIS lead or the entitlement receiving the ESG-CV?

August 25, 2020 from Cynthia Cardenas to all attendees: 3:28 PM  
If we are funding an ES with ESG-CV, does that mean it will be under temporary ES HMIS activity automatically?

August 25, 2020 from Therese Filthaut to all attendees: 3:28 PM We provide shelter, hotel and RRH. Would we have one CSV for shelter and hotel then another for RRH?

August 25, 2020 from Elizabeth Daniels-Totten to all attendees: 3:29 PM I thought I heard the presenter (Michelle) say we do \*not\* have to set up separate projects for ESG-CV funded projects in HMIS--only those that will start and stop with ESG-CV funds.....tell me where I'm wrong?

August 25, 2020 from Tonya Harris to all attendees: 3:29 PM  
what is the phone number to call, she is breaking up?

August 25, 2020 from William Snow to everyone: 3:29 PM @Katherine - RE: DV providers. You will not be combining data from HMIS and comparable databases. The victim service providers must have a comparable database and be able to run their own CSVs for ESG-CV reporting.

August 25, 2020 from Meradith Alspaugh to all attendees: 3:30 PM  
@Chris ultimately it is the responsibility of the ESG Recipient to submit the report. The HMIS Lead is responsible for generating the ESG-CAPER CSV from HMIS and providing it to the ESG recipient

August 25, 2020 from Melissa Ruiz to everyone: 3:30 PM So if multiple subrecipients are funded for Street Outreach all of them have to enter data into HMIS under one program for CV funding? OR how will the subrecipients combine all the uploads into one CSV upload?

August 25, 2020 from Amanda Best to everyone: 3:30 PM Can you clarify what you mean when you say one report for all of the projects in one community? Is that a CoC?

August 25, 2020 from Tiffany Leung to everyone: 3:32 PM I thought HMIS costs were not counted toward the 10% admin cap. Them being separate components. Can you confirm?

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August 25, 2020 from Nicole Waters to host (privately): 3:33 PM I'm a grantee entitlement community. Our HMIS Lead has never done CSV uploads for us. I enter the projects and add the sub-recipient emails to allow them to do the upload. Are you saying with the CV funds it must be done by our HMIS Lead?

August 25, 2020 from Abt Associate to everyone: 3:33 PM The call-in number is +1-415-655-0002 meeting ID 171 070 6644

August 25, 2020 from Anne Barber to all attendees: 3:32 PM  
Are the purchasing of HMIS user licenses an allowable expense for HMIS?

August 25, 2020 from Amanda Best to everyone: 3:34 PM Do we have to pick the same start date across the state?

August 25, 2020 from Therese Filthaut to all attendees: 3:32 PM  
My agency works with dv clients yet we have our own comparable database so we would submit our own reports. I just wanted to verify that we would provide one report for shelter/hotel and a separate one for RRH?

August 25, 2020 from Christopher McGadney to everyone: 3:34 PM 1855-797-9485  
code 171-070-6644

August 25, 2020 from Meradith Alspaugh to all attendees: 3:33 PM  
HMIS Leads can join the HMIS Lead/Sys Admin hub and monthly calls by sending an email request to hmis@cloudburstgroup.com. We will discuss HMIS Lead responsibilities for ESG-CV reporting again on our next call on September 16th at 1pm ET

August 25, 2020 from Jazmyn Thomas to all attendees: 3:33 PM  
How do you bundle HMIS CSV reports with DV service provider reports?

August 25, 2020 from Meradith Alspaugh to all attendees: 3:33 PM  
The ESG HMIS Program Manual is available at:  
<https://files.hudexchange.info/resources/documents/ESG-Program-HMIS-Manual.pdf>

August 25, 2020 from Carolyn Noble to all attendees: 3:34 PM  
Does a grantee enter into HMIS or does the subrecipient enter into HMIS?

August 25, 2020 from Crystal Karr to everyone: 3:34 PM We haven't received an award letter yet. Have they been sent out?

August 25, 2020 from Wendy Smith to all attendees: 3:34 PM  
If ES and New Temp ES - are they bundled into 1 report or 2 separate?

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August 25, 2020 from Therese Filthaut to all attendees: 3:35 PM  
I understand de-duplication, but the provider shelter/hotel is different from RRH

August 25, 2020 from Meradith Alspaugh to everyone: 3:35 PM @wendy - two separate

August 25, 2020 from William Snow to everyone: 3:36 PM @Tami - RE: Temporary emergency shelter - you will need to create a new project in HMIS for that project. Then you will collect data like other emergency shelters but when it comes to reporting you will bundle the data from that project with other temporary emergency shelters and report those. You will keep the reporting on temporary emergency shelters separate from the other emergency shelters.

August 25, 2020 from Agustin Paz to everyone: 3:36 PM Our CoC includes 4 local recipients (3 counties & 1 municipality). Do similar project types ACROSS the different jurisdictions represented by the recipients get aggregated?

August 25, 2020 from William Snow to everyone: 3:37 PM @Carolyn - RE: PJ or subrecipient and HMIS. All subrecipients that are serving clients should be participating in HMIS.

August 25, 2020 from Carolyn Noble to all attendees: 3:37 PM Perfect. Thank you

August 25, 2020 from Jennifer Wenger to all attendees: 3:38 PM RH?

August 25, 2020 from William Snow to everyone: 3:39 PM @Angela - RE: multiple HMIS. Some ESG recipients span multiple CoCs. In that case, the ESG recipient must work with each HMIS Lead to ensure they pull the appropriate data by component type so you can fulfill your reporting. You will not have to combine that separately. But you will need to ensure you set up the bundles in Sage to reflect the projects for each bundle and this will have to be for each unique HMIS implementation.

August 25, 2020 from Andrew Dearing to all attendees: 3:38 PM  
What about documenting programs that incurred costs prior to ESG-CV contract execution? would that report be in the first quarterly report?

August 25, 2020 from Liz Mengers to everyone: 3:39 PM @Marlisa Thanks. There's a delay between actual incurred cost by subrecipient and drawdown of funds by recipient. Trying to understand if the reference to expenditures in the decision tree on earlier slide is asking if an actual drawdown of funds has occurred

August 25, 2020 from Brendan Saunders to all attendees: 3:40 PM  
If we haven't signed the grant agreement prior to the first reporting requirement, do we have to go back and report all previous data at the first quarter report?

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August 25, 2020 from Charlotte Woody to everyone: 3:41 PM We are a County grantee, however, one of our subrecipient is the HMIS lead. Is that a problem?

August 25, 2020 from William Snow to everyone: 3:41 PM @Cynthia - RE: temporary ES. Temporary emergency shelters are shelters that would not normally meet the ESG emergency shelter requirements. If the facility would meet the normal ESG emergency shelter definition, then you will report it as normal emergency shelter.

August 25, 2020 from Norman Harris to all panelists: 3:41 PM I am an HMIS Admin and I just want to make sure I have this clear. We as the HMIS Lead will generate the report and submit it through sage correct? The actual recipient and subrecipient are responsible for their own reports?

August 25, 2020 from Amanda Best to everyone: 3:42 PM Do we request the reports from HMIS lead rather than subrecipient?

August 25, 2020 from William Snow to everyone: 3:42 PM @Therese - RE: shelter, hotel, and RRH. Shelter and hotels are both under the emergency shelter component so you will report those together (unless you have some unique shelters that meet the temporary emergency shelter definition). And you will report RRH separate from those.

August 25, 2020 from Brendan Saunders to all attendees: 3:43 PM @Amanda, I was wondering the same, we are a small municipality and have a close relationship with all sub-recipients.

August 25, 2020 from Amanda Best to all attendees: 3:44 PM Do we request the reports from HMIS lead rather than subrecipient?

August 25, 2020 from Therese Filthaut to all attendees: 3:44 PM Thank you, William that is what I thought.

August 25, 2020 from Meradith Alspaugh to everyone: 3:45 PM @Norman HMIS Leads must generate all of the CSV data from HMIS (the "bundles") - this would be inclusive of all the subrecipient data in HMIS. The VSP would generate their own data from their comparable database, otherwise, the HMIS Lead is pulling all data from HMIS.

August 25, 2020 from William Snow to everyone: 3:45 PM @tiffany - RE: HMIS costs. Some HMIS costs are separate from administrative costs. These costs include training users or buying new hardware to meet a higher demand, and other costs. These do not count toward the 10% admin limit - rather they will be charged as HMIS costs. But costs associated directly with reporting (e.g., running the CSV for the ESG-CV quarterly report) will count as administrative costs and do count against the 10% limit.

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August 25, 2020 from Meradith Alspaugh to everyone: 3:45 PM @Amanda, yes, the HMIS Lead is the one who will be responsible for submitting the CSV. However, you do not have to reach out to them directly, Sage will generate an email for them based on the data you enter in Sage.

August 25, 2020 from William Snow to everyone: 3:46 PM @Anne - RE: HMIS licenses. Yes - purchasing more HMIS licenses are eligible HMIS costs.

August 25, 2020 from Audrey White to all attendees: 3:46 PM  
As a brand-new Sys Ad, who can help me as the HMIS Lead id their recipients and sub-recipients?

August 25, 2020 from William Snow to everyone: 3:48 PM @Jazmyn - RE: DV service providers. Victim service providers will not combine data in HMIS or with HMIS data. They will continue to submit separate CSV files (like they do under normal ESG reporting).

August 25, 2020 from Eunyoung Cho to everyone: 3:49 PM how did recipients report previous to this SAGE requirement? also, how often?

August 25, 2020 from William Snow to everyone: 3:49 PM @Agustin - Yes. Similar projects across the ESG recipient's entire jurisdiction will get aggregated.

August 25, 2020 from Brendan Saunders to all attendees: 3:50 PM  
Will a SAGE Guide or fact sheet for this reporting be created?

August 25, 2020 from Meradith Alspaugh to everyone: 3:50 PM @Brendan yes, additional reporting guidance will be forthcoming

August 25, 2020 from William Snow to everyone: 3:50 PM @Andrew - RE: costs prior to grant execution. Yes - those will be included in the first quarterly report (and in cumulative reports after that).

August 25, 2020 from Rob Brodrick to all attendees: 3:51 PM  
@Eunyoung ESG recipients sent a CAPER report into Sage annually

August 25, 2020 from Eunyoung Cho to everyone: 3:51 PM Thanks

August 25, 2020 from Stephanie Morey to host (privately): 3:52 PM can William speak up a bit? low volume coming through and my speakers are at 100%

August 25, 2020 from Brendan Saunders to all attendees: 3:51 PM  
The CDBG funds will be different, there is a training coming up very soon.

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August 25, 2020 from Eunyoung Cho to everyone: 3:56 PM Are Project RoomKey sites considered temporary emergency shelters?

August 25, 2020 from Patricia Longua to all attendees: 3:56 PM Would a tent or Quonset type of hut be considered a temporary emergency shelter?

August 25, 2020 from Eleanor Vega to all attendees: 3:58 PM So, if the local COC applies to the state for the ESG-CV funds, would the state be considered the recipient, the COC the recipient and the participating agency the sub sub recipient?

August 25, 2020 from Yvette Miller to everyone: 3:58 PM Is part 2 on the 1st or 3rd??

August 25, 2020 from Keisha Allen to all attendees: 3:58 PM will there be any special reporting for financials?

August 25, 2020 from Eleanor Vega to all attendees: 3:58 PM i meant the

August 25, 2020 from Eleanor Vega to all attendees: 3:59 PM local COC would be sub recipient?

August 25, 2020 Reminder: Please make sure the TO: line is set to EVERYONE or the panelists don't see your question.

August 25, 2020 from Stacey Matthews to all attendees: 3:59 PM Are hotel vouchers considered temp ES?

August 25, 2020 from Diane Greer to all attendees: 3:59 PM Could you talk some more about reporting financial information? Is the HMIS Lead entering financial information in Sage? or is it to be entered in IDIS? Is there a template for the information needed?

August 25, 2020 from Marlisa Grogan to everyone: 4:00 PM @Diane & Keisha - the format will look familiar, but expenditure reporting will be done in Sage on a quarterly basis

August 25, 2020 from Breall Baccus to all attendees: 4:00 PM To Clarify- VSP will still need to submit the two reports (by quarter and to-date) quarterly, they will just run the report separately as they usually do?

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August 25, 2020 from Breall Baccus to everyone: 4:01 PM To Clarify- VSP will still need to submit the two reports (by quarter and to-date) quarterly, they will just run the report separately as they usually do

August 25, 2020 from Meradith Alspaugh to everyone: 4:01 PM @Breall, that's right, after the initial report, VSPs are also required to submit the quarterly and cumulative reports

August 25, 2020 from Kelli Clark to everyone: 4:02 PM The recipient creates the projects in Sage, the sub (subsub) recipient enters the data into HMIS, the HMIS Lead produces and submits the CSV in Sage, and the Recipient enters all the remaining info into Sage and Clicks the submit button correct?

August 25, 2020 from Patricia Longua to all attendees: 4:02 PM  
Would a micro shelter that has no facilities be considered a temporary emergency shelter?  
Shower/toilet truck would be provided.

August 25, 2020 from Keisha Allen to all attendees: 4:02 PM  
Our financials and programmatic are handled by different folks. for instance, I am the financial person and I have never been in SAGE or HMIS

August 25, 2020 from Stacy Tarpley to everyone: 4:02 PM How do we bundle projects with different start dates?

August 25, 2020 from Wendy Smith to all attendees: 4:02 PM If an ES provide (sub-sub-recipient) receives \$ from 2 recipients, 1 State 1 County or City ... Same provider if already ES

August 25, 2020 from Keisha Allen to all attendees: 4:03 PM  
so, could they print it out for me to fill out? or something like that because I don't use those systems

August 25, 2020 from Michael Boettcher to everyone: 4:03 PM Comprehensive Annual Paperwork Enhancement Regime!

August 25, 2020 from Sable Flewellen to everyone: 4:04 PM What is a COC?

August 25, 2020 from William Snow to everyone: 4:04 PM ah - CoC. Continuum of Care

August 25, 2020 from Liz Mengers to everyone: 4:04 PM CQPER doesn't really roll off the tongue

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August 25, 2020 from Patricia Longua to all attendees: 4:03 PM  
Would a micro shelter with no facilities be considered a temporary emergency shelter? A shower/toilet truck would be used. Food would be brought is as well.

August 25, 2020 from Kelly Sanford to all attendees: 4:03 PM

Is Excel considered an HMIS comparable database since it can generate csv?

August 25, 2020 from Therese Filthaut to all attendees: 4:04 PM

If our ESG-CV funds are for clients we are housing from hotel or emergency shelter, would we need to do a CAPER for the RRH since they will already be counted from the hotel/emergency housing CAPER?

August 25, 2020 from Meradith Alspaugh to everyone: 4:05 PM @Kelly No,  
Excel is NOT a comparable database

August 25, 2020 from Stacey Matthews to everyone: 4:05 PM CoC =  
Continuum of Care

August 25, 2020 from Tonya Harris to all attendees: 4:05 PM hotel rooms question

August 25, 2020 from William Snow to everyone: 4:06 PM @Kelli - exactly right!

August 25, 2020 from Eunyoung Cho to everyone: 4:08 PM Saw a definition about facilities without walls being defined as a temporary shelter. Would project roomkey hotel/motel sites qualify as a temporary shelter?

August 25, 2020 from Tonya Harris to all attendees: 4:08 PM  
we are talking about Cares money, that came out a while ago, not just the newest round of ESG-CV money

August 25, 2020 from Lloyd Schmeidler to all panelists: 4:09 PM If I understand correctly, this ESG-CV reporting in Sage is the responsibility of the ESG-CV recipient, while the regular ESG Sage reporting is the responsibility of the subrecipient. Is that correct?

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### QNA

-Lisa Jones - 2:49 PM

Q: I am with Embarras River Basin Agency - I have had conflicting answers on which set of reporting calls I should be on. Does anyone have any guidance on this? We serve 9 counties, so I had initially signed up for this call however was then encouraged to do

-William Snow - 2:51 PM

A: Hey Lisa - this call will focus on city/county ESG recipients. There will be a second part to it next Tuesday as well. On Thursday, the call will focus on states recipients. -

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-Danelle Walters - 2:53 PM

Q: I am with a city who is a recipient through the state...should I be at this or is this for entitlement communities with ESG? thanks :)

-William Snow - 2:56 PM

A: Today's call is directed to city/county ESG recipients. Tomorrow's call is directed to state ESG recipients. If you are not a direct ESG recipient, you do not have to attend either call. The calls will focus on the responsibility of direct ESG recipients-

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-Jennifer Crainer - 2:56 PM

Q: In the chat box, the only selection for the TO: is all attendees. There is no other option

-Jeanne Goodman - 2:57 PM

A: There will be as soon as the Panelists are ready.

-Jeanne Goodman - 2:57 PM

A: Then they hope you'll send messages to everybody.

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-Danelle Walters - 2:57 PM

Q: thanks!

-Thomas Bednar - 3:02 PM

A: You're welcome! -

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-Kathy Hunt - 2:58 PM

Q: not any more

-Thomas Bednar - 3:02 PM

A: You should be hearing audio now-

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-Jaime L. Rosario - 2:59 PM

Q: I'm from the Municipality of Mayaguez, Puerto Rico. I'm a State Sub-recipient for the ESG Program. Do I have to take the training today?

-William Snow - 3:00 PM

A: Hey Jaime - this training is for direct ESG recipients. If you are not a direct ESG recipient, you do not need to participate.

-Kathy Hunt - 2:59 PM

## ESG-CV Reporting Requirements Overview (City/County): Chat and Q&A

August 25<sup>th</sup>, 2020

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Q: no sound now

-Thomas Bednar - 3:01 PM

A: You should be hearing audio now-

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-Amy Wyatt - 3:02 PM

Q: I am with a CoC. Do I need to attend this webinar?

-William Snow - 3:09 PM

A: CoCs do not have to participate unless the collaborative applicant is a direct ESG recipient. However, because the HMIS Lead is selected by the CoC and the CoC Lead will have a critical role in this is it is a good idea to listen today (or tomorrow).

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-Lynnell Fuller - 3:03 PM

Q: I need the call-in number please

-Meradith Alspaugh - 3:03 PM

A: US Toll free

+1-855-797-9485

US Toll - +1-415-655-0002

Access code: 171 070 6644

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-Treva Gilligan - 3:03 PM

Q: can you provide the call in information

-Thomas Bednar - 3:05 PM

A: +1-855-797-9485

US Toll - +1-415-655-0002

Access code: 171 070 6644-

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-Treva Gilligan - 3:04 PM

Q: Please post the call in information

-Thomas Bednar - 3:05 PM

A: +1-855-797-9485

US Toll - +1-415-655-0002

Access code: 171 070 6644-

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-Yvette Miller - 3:05 PM

Q: Should grantee have access to HMIS or just the subrecipients? New to program side

-William Snow - 3:10 PM

A: The ESG recipient does not have to have direct access to HMIS unless they are administering a project directly. -

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-Meghan Raftery - 3:05 PM

Q: Hello - we have staff that have signed up for the State calls and have not received anything back, so they don't have links for any of the calls

-Thomas Bednar - 3:06 PM

A: Meghan, we will push out another reminder link for the State call tomorrow. It is possible that the spam filters filtered out the confirmation emails for those webinars-

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-Meghan Raftery - 3:07 PM

Q: we checked spam/junk/clutter nothing there, I got these invites and not the State invites.

-Thomas Bednar - 3:08 PM

A: Thanks for that information. -

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-Meghan Raftery - 3:10 PM

Q: if we have a Sage account already, will I need another account for the ESG CV upload (as the HMIS Lead)

-Meradith Alspaugh - 3:10 PM

A: The HMIS Lead does not need an account for Sage. The HMIS Lead will access Sage through a special reporting portal. -

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-Courtney Suchor - 3:10 PM

Q: If we already have a SAGE account, do we need to sign up for another?

-Meradith Alspaugh - 3:11 PM

A: If you already have a Sage account with access at your ESG Entity, you do not need to sign up for another account. -

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-Angela Susten - 3:13 PM

Q: We are the Recipient as well as the HMIS Lead. We have sub-recipients who have different HMIS implementations and do not participate in our HMIS implementation. Will those sub-recipients not participating in our implementation have to submit their own report?

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-Debbie Martin - 3:13 PM

Q: 2020 or 2021 September?

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-Richard Hoo (richard.hoo@miamidade.gov) - 3:12 PM

Q: Ist due date is October 30, 2021?

-Meradith Alspaugh - 3:14 PM

A: The initial report is due October 30, 2020-

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-laura lama - 3:15 PM

Q: all we see is the blue intro slide

-Thomas Bednar - 3:17 PM

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A: Hi Laura, we aren't hearing this issue from other attendees, so it may be a local problem. You can try relaunching/refreshing the webinar to update-

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-Aaron Shaw - 3:17 PM

Q: Good afternoon

-Thomas Bednar - 3:18 PM

A: Good afternoon! -

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-Meghan Raftery - 3:17 PM

Q: ES - if funds are only used for renovations does a CAPER need to be done?

-William Snow - 3:20 PM

A: Yes. If you do renovations, you will report on clients served in that project. -

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-Marisela Manzo - 3:19 PM

Q: If our Funding is in one category for example Homeless Preventing the reporting only needs to reflect those programs funded through CV1 not our regular ESG funds

-William Snow - 3:22 PM

A: For all projects except emergency shelter and street outreach, you should create new projects in HMIS. When there is an emergency shelter or street outreach project, if you have \$1 of ESG-CV in the project you will report on all persons served in a project-

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-Diane Bonner - 3:19 PM

Q: So subrecipient just enters HMIS data and Lead COC enters SAGE DATA based on HMIS

-Meradith Alspaugh - 3:20 PM

A: Subrecipients enter data in HMIS for each of their projects. HMIS Leads will pull reports from the HMIS and submit them in Sage. -

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-Richard Hoo - 3:19 PM

Q: I have 2 questions: What report do I run to get this CSV file? A CAPER report or CoC APR?

-Meradith Alspaugh - 3:21 PM

A: The HMIS Lead will run the ESG-CAPER to get this CSV file. -

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-Yvette Miller - 3:20 PM

Q: Are we combining the ESG-CV reports if we got 2 allocations of funds or should they be separate

-William Snow - 3:22 PM

A: Yes - you will report on the total of allocations 1 and 2 in your quarterly reporting. -

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-Nicole Hanson - 3:21 PM

Q: if you are a sage user already will you need a new user account

-Meradith Alspaugh - 3:22 PM

A: No. If you already have access at the ESG entity, you do not need a new user account. -

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-Andrea Carey - 3:22 PM

Q: Will data used ESG CAPER report in HMIS now? Or is there a new CV report?

-Meradith Alspaugh - 3:22 PM

A: Use the existing ESG CAPER CSV-

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-Yvette Miller - 3:24 PM

Q: would that be separate (2 different reports) or all together combining 1st & 2nd allocations

-William Snow - 3:31 PM

A: 1 set of reports (that will include all data on people served across both allocations) -

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-Chad Coffman - 3:27 PM

Q: ESG is new to our agency, is there a sample CSV file available?

-William Snow - 3:33 PM

A: @ Chad - RE: CSV file. This is a template of the current ESG reporting requirements.

<https://www.hudexchange.info/resource/5625/esg-caper-sage-hmis-reporting-repository-template/>-

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-Betty Rawnsley-Erazo (brawnsley@lowellma.gov) - 3:27 PM

Q: Did you just say that we would be able to reimburse back to January 21, 2020?

-William Snow - 3:33 PM

A: Yes. -

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-darwin wade - 3:28 PM

Q: Will the ppt slides be available after the training on web for future use?

-Thomas Bednar - 3:30 PM

A: Yes, the slides will be available in 2-3 business days-

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-Marisela Manzo - 3:29 PM

Q: I Understand

-Thomas Bednar - 3:30 PM

A: Wonderful! -

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-Richard Hoo - 3:29 PM

Q: Just to verify.... we will run a separate ESG CAPER report to be submitted via SAGE for each separate group like RRH, Prevention, etc. Correct?

-William Snow - 3:33 PM

A: Correct. -

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-Marisela Manzo - 3:31 PM

Q: We are in the beginning stages in awarding our funding all focus on Homeless Prevention, just want to make sure they are properly set up.

-William Snow - 3:34 PM

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A: We appreciate that. Proper setup will save you lots of headaches later in the process. -

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-Marisela Manzo - 3:36 PM

Q: The CAPRE will be a report on all HP providers together?

-Meradith Alspaugh - 3:38 PM

A: That's right. All HP projects will be run together in a single report. -

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-Gabriel Lemus - 3:39 PM

Q: Is the CSV bundling in SAGE only for ESG-CV or does it now apply to the regular (non-CV) ESG Program?

-Meradith Alspaugh - 3:39 PM

A: Bundling is only applicable to ESG-CV -

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-Jamie Gibson - 3:42 PM

Q: This may have already been asked, but when is the second part of this session scheduled for?

-Thomas Bednar - 3:47 PM

A: Part Two of this webinar series for Cities/Counties will be 9/1/2020 at 3pm EDT -

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-Meghan Raftery - 3:43 PM

Q: If a State gets funding for STATE as the recipient and then a CITY as a recipient, so 2 grants, the reporting would be separate correct?

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-Marisela Manzo - 3:47 PM

Q: We don't have an executed grant agreement, but we have expenditures are we able to submit?

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-Marisela Manzo - 3:47 PM

Q: Will these slides be shared

-Thomas Bednar - 3:49 PM

A: Yes, the slides will be available in 2-3 business days-

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-Juan Albino - 3:47 PM

Q: I understand this training is being recorded. What can I go to find the this recorded training to refer back to at a later time?

-Thomas Bednar - 3:50 PM

A: <https://www.hudexchange.info/trainings/snaps-covid-19-webinars/>-

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-thayer goya - 3:44 PM

Q: So, there will be Outreach, Emergency Shelter Services, Emergency Shelter Operations,

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-Meghan Raftery - 3:48 PM

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Q: Will the email that go out on a specific date each quarter, to the HMIS Lead to approve the projects that should be reported

-Meradith Alspaugh - 3:51 PM

A: not necessarily. The email will be sent once the ESG recipient has completed their bundling steps in Sage. -

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-thayer goya - 3:50 PM

Q: Expended funds? How do we get the expended funds amounts? From the subrecipient: that's never going to happen.

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-Justus Bolo - 3:56 PM

Q: Since the ESG-CV reports will be submitted quarterly, will there be a need to include the ESG-CV reports in the annual CAPER.

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-Dana Moore - 3:56 PM

Q: Will this recording and PowerPoint be sent out to the group?

-Thomas Bednar - 3:56 PM

A: The recording and slides will be posted here in 2-3 business days  
<https://www.hudexchange.info/trainings/snaps-covid-19-webinars/>-

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-Brook Gajan - 3:58 PM

Q: So, who does the SAGE reporting the ESG Recipient County/City or the HMIS lead if they are two different entities.

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-Yvette Miller - 3:59 PM

Q: I thought part 2 is on the 1st vs. 3rd

-Thomas Bednar - 4:00 PM

A: Part 2 for City/County is on 9/1/2020, for State/Territory is 9/3/2020-

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-Meghan Raftery - 4:01 PM

Q: so, if recipients doing go into SAGE till the end of the month HMIS Leads will only have a few days or possible one day to process that and upload the CSV?

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-Laura Reid - 4:03 PM

Q: Will regular ESG sub-sub-recipients report quarterly?

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-Tim West - 4:03 PM

Q: Finally! I know what CV stands for! So, we're pulling CSVs for CV. Got it.

-Rob Brodrick - 4:06 PM

A: You got it! -

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-Erin Matheny - 4:06 PM

Q: In addition to the quarterly reporting, will there be annual reporting?

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-laura lama - 4:06 PM

Q: can you re-explain how we determine the start date we should use?

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-Yvette Miller - 4:09 PM

Q: Are hotels considered temporary shelter (emergency shelter)??

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-Tim West - 4:09 PM

Q: Thank you all.

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-Charlotte Woody - 4:10 PM

Q: Will you also send us the questions and answers from today's session?

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-Charlotte Woody - 4:12 PM

Q: Our current HMIS system mainly captures the homeless individual or family. Will all HMIS now start capturing data for homeless prevention clients?

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-Meghan Raftery - 4:13 PM

Q: I will rephrase question: Jurisdiction 1 get \$6M, Jurisdiction gets \$8m - since they are DIFFERENT grants and jurisdictions the bundles for J1 and J2 are reporting separately correct?