Using eCart for the ESG CAPER Webinar Transcript – 10-29-2015

Dan Fox: Good afternoon everyone. Thank you for attending the Using eCART for the ESG CAPER webinar. My name is Dan Fox. I work for the Cloudburst Group, I'm a HUD TA provider. Today we will be hearing from Marlisa Grogan from the SNAPS office and Michelle Budzek from the Partnership Center. And I also want to mention that we have Joel Remigio, David Durkalski, and Meradith Alspaugh on the phone to handle some Q & A on the back end.

I am going to go over a couple quick housekeeping tips here before I hand this over to Marlisa. And I just want to make sure that everyone knows that this webinar will about one hour. We will have hopefully some time for some Q & A at the end. We will post the recording, the slides, and the transcript of this on the HUD Exchange. It takes us a little bit to get everything posted just because we have to have everything reviewed for finally compliance to make sure that persons with disabilities are able to access the materials.

So if you have any issues – sometimes when you have very large groups like this, sometimes people can have trouble getting in. And I want to make sure that everyone knows that typically calling in on the telephone works better for audio quality. But if you are having trouble with the webinar in general, just make sure you log out and then log back in. And typically that works. And also, we do have the chat pane available for people to use if you are having an issue and figure it out. Feel free to send them a chat message to the organizers.

That said, except for what I just mentioned, we ask that you do not use the chat feature. This is because we want to try to be able to track your questions. The Q & A gives us the best ability to do that. Plus on the backend, we are able to get a report of all the questions because we probably will not be able to answer all of them today. So please use the question function of GoToWebinar. It should be on the right hand side of your screen there.

If you do not get your questions answered today, there is always, of course, the "ask a question". Just make sure when you submit your question that in step two once you complete the information about yourself, your email and all that information. In step two, make sure that you select that your question is related to the emergency solution grants to make sure it gets directed to the correct pool. And with that, Marlisa, I am going to hand it over to you.

Marlisa Grogan: Thank you. Hi everyone. This is Marlisa Grogan from the SNAPS office at HUD. It is really great to be here with you all to share the new and improved ESG CAPER Annual Reporting Tool, what we are affectionately calling eCART. And to make sure this process is a clear and straightforward as possible for everyone. So today we are going to be reviewing specifically the data flow from HMIS all the way through the eCon Planning Suite, uploading subrecipient CSV files into eCART, correcting data validation errors, using the eCART to filter ESG data, embedding eCART into a word document, attaching eCART to the CAPER in eCon Planning Suite and troubleshooting common eCART problems. That will sort of be interspersed through the webinar.

So before getting into the specific features of eCART itself, let us just go through some background information about the eCART requirement and how it fits into the larger context of ESG CAPER reporting requirements. So ESG recipients are required to report in the eCon Planning Suite in IDIS on all ESG funded activities carried out during the reporting period (that is the recipient program here), the ESG specific CAPER screens are listed right here in front of you.

There is CR-60 Subrecipient Information, which is manually completed using internal records. That is how it was in the past and that is how it will continue. CR-65 Persons Assisted, this is really the one screen that gets effected by the new requirement. Do not complete any of these tables. You are just going to disregard these tables on CR-65. Instead, you are going to attach the eCART file to CR-00. This is, again, the only screen that is effected by the new requirement. And we are going to get into attaching eCART to CR-00 later on.

Screen CR-70 Assistance Provided in Outcomes that is manually completed using internal records the same as it was before. And CR-75 Expenditures, which you have used in the past to manually complete using internal financial records and you will continue to do so. You can refer to the Con Plan Desk Guide, which is available on the HUD Exchange. Make sure that you are accessing the March 2015 version for detailed information about how to complete screens CR-60, CR-70 and CR-75.We will provide a link to this resource and a few others at the end of the webinar. But that is a good reference to have in the back of your mind.

So here is a little bit more background information. Recipients are not going to be required to use eCART until they are drafting and submitting the CAPER for their 2015 program year. So recipients with the earliest program year start date begin their 2015 program year in October of 2014. And they just ended September 30, 2015. If you are one of these recipients with really early program year start dates with CAPERs due this December 31, 2015, be aware that these new requirements are applicable to you.

So it is not just a matter of having your CAPERs due after October 1, 2015 if you have an extension or something. It is for your 2015 program year – your 2015 CAPER. That is when you will start using the eCART tool.

Through these ESG CAPER enhancements, ESG recipients are going to be reporting for the first time on program outcomes such as housing destination at program exit and other important measures such as the length of time between the program participant’s entry date and their move in date for rapid rehousing projects. There are a few really unique outputs and outcomes now that will afford you the ability to show the impact the bigger programs are having in your communities. So these updates will also enable HUD to collect national ESG Program data. That helps us justify funding for the ESG program. And it also helps us substantiate the program effectiveness.

The data you report through eCART, it brings the ESG Program in line with the CoC Program annual performance report, which gives communities an improved ability to coordinate system wide performance measurements throughout the CoC geographic area. Let me turn the presentation over to Michelle so she can start reviewing some important terms. Michelle?

Michelle Budzek: Hi all. So we are just going to go through a few terms and make sure that you are on the same page we are with what we are talking about. So eCART, of course, is the brand new tool that you are going to use. There was an upgrade to the tool that was posted on the HUD exchange yesterday. And you are going to want to download that latest and greatest upgrade tool. If you have already downloaded another one, you can consider that other one a play tool and this one a real tool.

The CSV, we will talk about that quite a bit. CSV means comma separated value. And it is the way in which the HMIS system, the Homeless Management Information System in your community is going to export the information from HMIS over onto eCART. The CSV file will be used to populate the eCART tool with all of the data that came out of HMIS. So the good news here is there is not a whole lot of typing, pulling reports and typing them into a new system. It should all happen for you automatically.

The next term we are going to look at then is projects. Just so you are clear, know that often times folks get confused about the terms we are using. So project is referring to the on the ground activity in a community like the emergency shelter, the transitional housing. HUD used the program to refer to the funding source. So ESG Programs and Emergency Shelter Projects. And then the component of the projects are those things that are the eligible categories that ESG allows you to fund. So it allows you to fund shelters, street outreach, RRH or homeless preventions. And in shelters then, you are allowed to fund essentials operating on renovations. Those are components.

So let us take a look at – I know we have already gotten a question on this. Who has to do what here and how does this stuff flow? So the recipient in the case of ESG is the jurisdiction that has received the money. They are sometimes in old fashioned terms called the grantee, right? They are the recipient of that entitlement funding that is coming to the community for which they then sub grant that out to subrecipients. Sometimes they do the work themselves. Sometimes they grant it out. But when we speak of subrecipients here, we are speaking of the work actually being done on the ground. So the homeless provider is the subrecipient. They are the ones that have entered the data into HMIS. They are the ones that will be required to run the ESG CAPER report in HMIS and send it to the recipient.

So the ESG funded shelter will be running the CSV file and sending it to their city or their state. They send it in a zip file. And when the recipient, when the city or the state gets that zip file via email to them, they gather those files and upload them into eCART. So depending on who you are listening to this, you should be able to figure out what your role is in this format.

You will notice that there is no role here pointed out for the CoC or the HMIS lead agency. It is this process, we are assuming, that the subrecipients can actually press a print button and generate a CSV file that will be able to go over to their recipient or jurisdiction. If that is not the case, then the HMIS lead agencies would be the place that you would go for help. And they should be able to point you to how to do that or work with your vendor to get that out.

When we go into eCART, it is a simple Excel file. It has been all configured for you. It is not that complex. Always remember that you can always throw it in the trashcan, download a new one and start again. This should not be a scary experience. There is nothing you are going to do here that you can totally screw up your uploads and that is correct.

So when open eCART, you are going to see an introduction tab. It has embedded for you the guidebook, the eCART guidebook. And it is up to date with whatever tool you are looking at. It has troubleshooting tips. Each one of those sections, if you click on it, is a link. And it will open the section for you and you will be able to read it. You can print out just that page if you want. You can move to the previous page or the next page. It is just a guidebook. But it is always there right on your desktop ready for you to use whenever you need to use it while you are in eCART.

The next slide shows you the eCART import data tab. And that tab is where you are going to go to import your data. You are going to fill out the cells in yellow, which are basic information. It is what jurisdiction, what is your year, who is submitting with information and telephone numbers. Each time you fill it out, the fields that are required are really clearly marked there with the red. The checkbox shows the answer. ECART is filled out by the jurisdiction, not by the subrecipient. It is filled out by the recipient. So if you are a subrecipient listening to this, you do not have to fill this out. This is all you do. Send your file folder to the jurisdiction. And now the jurisdiction is going to fill this out.

Then they are going to press click here, choose a folder and import that data. And we are going to show you a live demonstration of this in a minute so that you can see that. And we are just going through the screens right now.

So let us go to the next screen that shows you when your data comes in, there is a Check Your Data screen. It is going to tell you if you have imported two projects – two of the same projects. So often times, if you are a large jurisdiction with a bunch of projects, maybe two people have been working on this and then importing data at different times as they are coming in or something. The same file could get put in their twice. ECART is going to tell you that you duplicated it.

On the next slide, you will see that eCART will also take a look at the data as it comes in. So literally what happens when you import the data is eCART flattens your data, reads your data, decides if you have made any mistakes and automatically makes your data into reports. And it all happens in the space of a few seconds while you are importing the data. It is really kind of cool.

In the Check Your Data section, it will show you where there are errors in the data. And Marlisa is going to talk a little bit here about data errors and what is allowable and what is not allowable in terms of data errors. Marlisa?

Marlisa Grogan: I am here. I just wanted to jump in and carve out what we mean by resolving the 25 percent error rate. So if the data on any project exceeds the 25 percent error rate, then the sub recipients of that project should be asked to review, correct their data and resubmit a CSV report. But if in working with the subrecipient, the recipient is unable to correct the data, an example we give here is the subrecipient just did not collect the information or there are just other functionality issues, then the recipient should explain the situation and provide a reason why the error rate could not be resolved in a narrative text box in screen CR-65.

So just add narrative text boxes as you normally would if you were to do so in the eCon Planning Suite. Include in that explanation along with the reason why you cannot resolve it, the corrective action that you plan to take for the future. And so that is a way to show the field office, the representative that is reviewing your CAPER that yes, I do have a high error rate. I did not resolve it. But here is the reason why. And here is the way I am trying to address it in the future.

And then we also wanted to bring up a question that I am sure many of you may have. And that is what happens if I just cannot get this together and I cannot comply with eCART requirement? So in particular, in regards to comparable databases, HUD does expect that those comparable databases have the functionality to extract ESG data using HMIS software or ESG CAPER Generation Tool so the recipients in turn can upload the data into eCART. When a subrecipient just cannot meet that standard, the recipient should contact the local HUD field office and me, Marlisa Grogan and my email address is right there, to request an exception to this eCART requirement for good cause.

When we are talking about good cause that is a subrecipient is working to upgrade its comparable database to perform the CSV export. But the subrecipient is going to have the upgrade in time for the CAPER submission. So in situations like that, we would consider an exception. But the subrecipient does need to have an accessible plan and a timeline for coming into compliance.
So I just want to carve by the first bullet. When we are talking about comparable databases and their functionality, the bullet does say using HMIS software. But for comparable databases, you are really limited to the ESG CAPER Generation Tool. So we are updating the CAPER Generation Tool. It is not available yet. It should be available very shortly. But that would be another good cause, another reason to contact the field office and me to request an exception if you are concerned about meeting any deadlines.

So we hope that this additional information helps clarify some of the questions that have been coming up. But in all cases, if you still need additional assistance in addressing a particular situation, feel free to submit in the cue and we can talk through the specific challenges that you might be dealing with. Having said that, I am going to turn it back to Michelle.

Michelle Budzek: So I have had the ability just to read the voluminous number of questions about domestic violence while Marlisa has been talking. And HUD is not putting out a comparable database for domestic violence victims. They are expected to have and have been using a comparable database all this time. They were required to do that for the CoC Program if they got CoC Program funding and have been required to do it for ESG since. So this is not a new thing. And getting reports from them should not be a new thing. What is probably a new thing and we recognize this is that there are systems that may or may not really be compatible to HMIS. They may or may not be able to generate this report. So those were the kinds of exceptions that Marlisa has talked about.

Going back to eCART data, eCART is going to be able to generate reports. As soon as you put your data in, eCART will fill up the combined reports. And you will have a combined report of all of the reports that are in eCART system right away. And there is a way to do reports with filters. So you can generate a report just on a particular project that you have like one of the shelters. Or you could generate a report on all of your shelters. Or you can generate a report on all of the projects of one particular organization or agency that you have granted funds too. So it allows the jurisdictions, the recipients to be able to kind of slice and dice that data up in a variety of different ways for different kinds of uses. So that and the eCART Tool is probably a good tool for CoCs to be able to also take a look at their shelter data. And we expect that at some time in the future that CoCs will probably use the tool for that kind of thing.

The Report with Filters, as you see, allows you to pick an agency, project type or a project name and filter the data so that you get essentially what looks like – the CAPER now looks like a HUD Continuum of Care Annual Progress Report. The tables come out looking like the APR, if you are familiar with that. And this allows you to generate that kind of report for any one of these kinds of groupings.

The Combined Report, we have talked about a minute and just moved back to tell you that if the report of all of the projects that have come into eCART. So HUD knows that a homeless individual may sleep in five different shelters in a community in one year. And all five of those shelters are funded by ESG. And that person is going to be reported in each one of those shelters. And that the Combined Report is going to then show that one person as five individuals. They understand that. So you do not have to worry about getting an unduplicated count of homeless people. We are going for project counts here.

What will happen though is if the city and county in the same area fund the same shelter, once it gets to the national headquarters, we will be able to pull out all of those duplicates from perhaps the county's report and just leave the city's report in. So we are kind of deciding at this point which way duplication and induplication work best in the ESG world. And so this is our attempt to do that.

Then you are going to have one last tab in eCART. It is the data tab. That tab is where all the data is actually loaded. So eCART will load all of the data into this one tab. And you are actually able to see the flattened data that comes out of the CSV file into the eCART tab. The tab is locked. You cannot change the data. We are going to show you how to delete the file if you want to delete it. But that is where your source data is. And we will show you how you will see the validation errors in the source data if you select to do that.

We had hoped that this whole thing was going to be a simple process and you were just going to attach eCART to the eCon Planning Suite. But no, so Marlisa is going to tell you what to do now.

Marlisa Grogan: Okay. Thanks Michelle. Before we get into the live demo, I am going to run through this process that Michelle just introduced. So it is an embedding of the eCART Tool, which is an Excel file into a Word document. So for those of you who may have reviewed the eCART for guidance when it was first posted, you may have noticed that the instructions have changed. And Michelle prefaced this by saying if you have looked at eCART in the past, you would consider it sort of just a test run and throw those away. Download a new version of the eCART Tool and Guide today. And you will have the most updated version. So if you see any old references to simply uploading the Excel files, the CR-65 screen, it is no longer the key.

So why do we have these extra embedding sets? We need to do that because the eCon Planning Suite does not recognize Excel files. And for that reason, the Excel file needs to be uploaded or embedded in a Microsoft Word document before attaching it to screen CR-00 in the eCon Planning Suite.

Only upload the Word document to screen CR-00 because other screens will not recognize the file type other than jpeg. So you need a Word document that has the Excel file embedded. And you need to be attaching it to CR-00.

So let us go through the embedding process step by step. And also know that these instructions are included in the eCART guide in even more detail. So we break down the steps even more in the eCART Guide.

So let us say you are the recipient. You finished uploading your service agreement files. You have checked your data. You have resolved any validation errors. And now you are ready to attach this eCART into the eCon Planning Suite. To start the process of embedding the eCART Excel file and toolbar document you would, step one, open up a new Microsoft Word document and save it in a place where you can easily find it. Step two, from the Insert Menu screen, click on Objects. So make sure you are on the insert tab. And then look all the way over to the right of the insert tab and you will see “objects” which is circled in red. Click on that and a dialogue box is going to appear. So at that point, step three, click on the create from file tab in that dialogue box and then click browse to search for and select the eCART file.

Next slide. Step four and the next thing you are going to want to do is look to the middle right of the dialogue box and check the box for display as icon. That is circled in red. And then click okay. And then step five, once you click okay, an icon of your eCART Excel file appears directly in your Microsoft Word document. So you can see right there that there is a screenshot of a Microsoft Word file. And the icon of the Excel file document right in there. And that is embedding.

Now that your eCART Excel file is embedded in the Word document, save it in a place where you can easily find it for the next step, which is to upload the attachment to screen CR-00 in the eCon Planning Suite.

So right now in front of you is a screenshot of CR-00 in the eCon Planning Suite in IDIS. The first thing you are going to do is click on browse to attach on that screen. And you can see the browse to attach link on the screenshot circled in red. So you are going to click on that. And then the next slide shows the dialogue box that is going to appear. So you are going to enter a title for your eCART Word file in that first field. Choose a title that is going to allow your file to be easily recognized as the eCART attachment so something simple like eCART – something that is going to flag it for both you and your field office representative that is reviewing. This will help you and your field office find it easily. Then click on Choose File to navigate to and select the eCART Word file. Once you have selected the eCART Word file, click save, which will take you back to screen CR-00.

Okay. So now that you are back on screen CR-00, go to the top of the screen and then click save and then return. This is going to take you back to the main CAPER screen. And then from the main CAPER screen, click on CR-00 just to confirm that the Word file is there with the embedded eCART successfully attached. As you can see right here in this screenshot in the red circled area, the eCART is successfully uploaded as Attachment 1.

So those were the processes for embedding eCART into a Word file and attaching the file to screen CR-00 in the eCon Planning Suite. And again, if you did not follow all the steps this time around, you can go and look at them in more detail in the eCART Guide. And then you will also have this recording of the webinar to refer to once we post it on the HUD Exchange.

We just want to flag some main resources that can help you out in completing the ESG CAPER screens in the eCART before we move to the live demonstration. The first resource there is a link to the eCART Tool, which includes the eCART Guide in that first tab. And I am going to say it again, but it is important. Remember to discard any old versions of the tool and guide and go the HUD Exchange today or tomorrow sometime recent after today to get a fresh updated version.

The second resource is the Con Plan Desk Guide. And I am just reminding you to make sure that you use the March 2015 version. And be on the lookout for upcoming updates of the desk guide, which will include references to eCART.

And the final one that is there is the ESG CAPER Generation Tool. So we have not released it yet. But we will post it on the ESG Lister Group as soon as it is available. So make sure you are signed up for the ESG Lister Group.

And I know that there was a question about the ESG CAPER Generation Tool. It is basically a tool that can be used by ESG recipients whose HMIS system does not have the capability to run a HMIS report. So it is something that has been used in the past in lieu of a HMIS generated report. So it just another tool in your toolbox.

So now we are getting ready for the live eCART demonstration. Michelle is going to review uploading subrecipient CSV files into eCART, identifying data validation errors, using the eCART to filter ESG data and troubleshooting some common eCART problems. All right, Michelle. Take it away.

Michelle Budzek: Okay. We are switching screens here to our screen. And what you are going to see here on our screen is a file folder that we are going to drag on over to the center of the screen so that you can see that it is just a blank file folder that is the master file. So when you start this whole process, put a blank file folder either on your hard drive or on your server that is the master file.

Then you are going to load that file up with each of one of the CVS files that comes from the project. So this master file is sitting on the person at the jurisdiction's computer or server that is going to be in charge of loading up eCART. That person is going to receive the individual project level CSV files from each one of the agencies and is going to put those in that file.

If the file comes to you zipped. And hopefully you can see the little zipper on this file. If you have never seen a zipped file, it looks just like a file folder in Microsoft, but it has got a zipper on it. You are going to take that zip file and unzip it. And to do that, you are going to just extract all. Hit the extract button and there it is. That is all there is to taking out the zip file. And then you are going to delete that zip file. You no longer need that there. So if you get a zip file, you are going to unzip it.

You can have ten file folders here or you could have one hundred file folders here. Each one of these file folders that you are looking at represents a different project. So each shelter in your community would send in their own project file. And you would have a file folder inside your master file for each one of those shelters.

You are going to then not change the name of the file folders, open the file folders or change the name of anything inside the file folders. If you start messing with the file folders, you run the risk of messing up the data. So just leave them alone.

Open your eCART file that you downloaded from the HUD Exchange. When you open it, you see the instruction page. And you are going to go to import data. You are going to fill out – remember we talked about the jurisdiction filling out all of these fields that are the required fields. And then you are going to press that big clip here to choose a folder.

It is going to open up your Windows browser thing that allows you to pick which folder you have. You are going to find that eCART master folder. You are going to click on that master folder. And then you have got to click what is this folder and import data now. You cannot just double – triple – quadruple click on the folder. You can click all day long and it is not going to come up. You have got to tell it to come up.

As eCART is loading, you will see it is spinning. The more files you elect to import at one time, the longer it is going to take. Literally, eCART is transferring everything from CSV over, typing it all in, doing the validations, checking everything out and making your reports all in the time it took to spin.

So we know if you import a few files like ten at a time, you are okay. If you try to import 50 projects at one time, you are going to be waiting 45 minutes. And that would not be unusual to be waiting that long because it really is processing all of that data at once. And it is only an Excel spreadsheet. It is not Google that can process as fast as the internet and Google can. When the import is complete, eCART tells you that. And you have got that little symbol there telling you it is complete. You click okay. And then you can take a look at your data.

So what happens when you are looking at your data is that you see, again, if there is a duplicate project. And we had this loaded for you in advance to show you what it looks like if there are two project file folders in your eCART file that there is a duplicate project or that there are errors in other kinds of fields.

So let us take a look at that duplicate project problem first. And we are going to get rid of one of those duplications. When we click on the Excel, you will see a page. It whizzes you back to the data tab and shows you that Agency A, RRH Program, is a duplicate of that Agency A, RRH Program on the top. It is going to highlight and give you a red indicator of which file is the duplicate.

If you know you just imported it twice, it is no big deal. Pick one. Take it out. If, for some reason, you had to remove the project – you wanted to remove the project from your report, perhaps it had bad data in it, and make the shelter or the project resubmit a project to you. And then you have uploaded two of them, one with good data and one with bad data, you are going to have to take a look at the data in more detail by scrolling down the screen and looking at that data to see which project is the right project for you and which is not.

So we are going to take that duplicate project out by clicking here to delete one of the projects on the data tab. You will see that Column A opened up for you. You are finding your duplicate project. You are going to click on it, check it and tell it to delete that row. It is going to make sure you really want to delete that row and you delete. You may delete one project at a time or you may delete multiple projects at a time.

If we go back to taking a look at check your data tab now, you are going to see that the error where you had duplicate files has gone away. And now what you have got left is files that have issues with their data.

So Agency A, RRH, had a 19 percent error rate in their gender of children. They did not have gender completed for their children. And all we are doing in validation is matching the total number of children that they reported in the question 6A to the number of children in the table on Q10B. So we are just matching the totals to the totals. If the totals to the totals do not match, we are showing you that there is a [Audio issue from 00:43:51 – 00:44:21].

Marlisa told you before to do one of two things. The first issue is we encourage you to go back to the provider and ask the provider if they can fix their data. Do they realize that they did not enter any of this information or that they have such a high error rate? And if the provider is keeping paper files next to computer generated files, then yeah, they probably can fix the data and generate a new CSV file for you. But if they were taking the data in real time or they just did not collect the data, there is no way to reproduce something that was not there in the first place. And at that point that is when you would write on CR-65 in the narrative section the issue that you had, the action you took, the plan that you have so that they will be able to collect this data next year and submit it to HUD and your field office, as they are reviewing it, will take a good look at that and let you move forward.

We do understand that this is the first time that this kind of level data is coming out of many of these projects. And especially for the mass shelters, we recognize – HUD recognizes the difficulties that shelters have had collecting data. So they have had two years now of collecting data for very simple ESG reports, ESG paper reports. This one is more complicated. We recognize that. We know there are going to be errors. That is why the error rate of 25 percent is what HUD elected to use for this project.

You will be sorely tempted to try to correct the errors if you are the anal retentive bookkeeper type person that many ESG agency folks or jurisdiction folks are because they want everything to match up and balance. Do not and go back into your data tab and try to mess with the data. It is locked. It is locked on purpose so that you cannot do that accidentally. If you want to correct it, you have got to delete the file and reopen the file. You cannot correct the data in eCART.

And there is a really good reason for that. Part of what we are trying to do here across HUD and across homeless management information is to get the HMIS system across the country in much better data shape. And if you correct the mistakes here in eCART, they are never going to be corrected back at the source data in the HMIS system. And they will continue to be running as source problems for all kinds of things like system wide performance measures or other kinds of reporting that communities are going to use. So we do not want you to correct the data here.

We want you to be able to take a look at the reports that are generated. There is a combined report. And that, you do not have to do anything with. And you make that a bit bigger so that they can see it. Oh, that is small on this screen.

This is just the table shells. And as we roll through them, you are just going to see that the table shells look like table shells you have seen before. It adds up all of the projects, the information from each one of the projects and shows it in a combined report. So all of the combined, consolidated information from your ESG Program is now right here in front of you. And you do not have to type in a number. You do not have to do any of the addition, subtraction, multiplication or division. It is all there for you.

Well we think that sometimes you are going to want to look at this data on a jurisdiction level in different ways. And so there is a report with filters tab that allows you to select – allows you to identify some filters to take a look at the data. So if you click on that change filters on the data tab, it is going to bring you back to the data tab. It is going to allow you to select. Perhaps you want to take a look at all of the RRH Program data that is in the system. You are going to click on that RRH button. It is going to spin. You are going to go back to your report with filters. And now you are going to see the information just for the RRH Projects that are in your database. And there is just the RRH information. So you want to know how many shelter bed nights you used. It is going to provide the number of people you served in emergency shelter you know. Or by just picking RRH, you are going to know how many people you had rolling through your RRH programs in the community.

So the report with filters is really a feature just for you to use. HUD is really going to look at the combined reports and the data quality part of the report. But this feature allows you to slice and dice the data in some different ways.

We are not going to show you how to upload eCART for submission to HUD because I think we wrote the instructions and Marlisa's PowerPoint here have gone over that really clearly for you. And it really is a process of just following step by the step the instructions as you are going through. I do not think you are going to remember it if we show it to you now anyhow. So, it is just sitting down with those instruction sheets next to you and going ahead and doing it.

So we are going to take this back to Dan and Joel and see if there are questions then.

Verbal Questions and Answers

Dan Fox: Michelle, do we want to stay on this tool for just a moment in case we need to navigate around to answer questions?

Michelle Budzek: Sure.

Dan Fox: All right. So I am seeing some hands raised here. Go ahead, Joel.

Joel Remigio: There are a lot of answered questions. I hope, even if you have been asking questions that you are looking at the questions panel. Because when we do answer the questions, we do make those public so you can see them. And we have actually got such good coverage on the backend here that there are very few unanswered questions right now. So of the ones that are left, there are a couple I guess really about – and I think you have probably touched on this, Michelle, but administration projects, folks who are getting ESG dollars, but they are not serving clients per say like a HMIS lead or they are getting that HMIS money. Are they expected to do this process as well or how is everything going to work?

Michelle Budzek: Marlisa, do you want to do that?

Marlisa Grogan: Sure, I can take this one. So if you are not serving any clients, any program participants, then this does not really apply to you at all. Because this eCART is all HMIS database. And it is taking the place of the tables that had been filled out on screen CR-65. So if you did not have any data that you were filling out or contributing to CR-65, then you do not need to worry about the eCART Tool. So in general terms, if you are entering – if you are required to enter data into HMIS, then you would be required to complete the eCART process to report on persons served. But if you are just doing HMIS activities, then this would not apply to you.

Dan Fox: All right, Michelle. We have, I think, a probably a pretty standard kind of question here about reporting for ESG projects that are partially funded by ESG. So the question essentially is if not all of the services are funded by ESG, what do they with the CAPER reporting?

Michelle Budzek: So a typical scenario is that the services that you are talking about, for example, you do not case management in the shelter and only half of your shelters receives case management services because your shelter is so big and the case manager cannot serve everybody. The rules for ESG reporting are the same as they were in the past. For an emergency shelter, you report on everybody in the emergency shelter regardless of whether the service touched that person or not. That would be the same thing for a day shelter. You would report on all of the persons in the day shelter whether they got the service or not. You would report on all of the persons that were in the street outreach project even if that street outreach worker is part of a team with other people and they have it in the system all as one project.

It really should be in your HMIS system as two projects. But if perhaps your ESG project is supplementing your past projects in the community and it is all in one project in the HMIS, you would report on everybody.

And the only one where I think there are still some lingering problems is if you put homeless prevention with rapid rehousing. You need to split those apart. They are two different project types. They have been two different project types for quite a while now. And the HMIS system, all the guidance on ESG and all the guidance on RRH including the FSBF [PH], all the guidance across the country is those projects are to be split between homeless prevention and rapid rehousing. So you need to make sure that those are split. If your rapid rehousing project had a bunch of different funding sources in the same project and some funding was funding services and say ESG was funding the rental, you would report on everybody in the rapid rehousing project.

If you put your state rapid rehousing project and your city rapid rehousing project in one project in your HMIS, in that case, you are going to have problems. And those need to be pulled apart. They were supposed to have been set up separately. And we hope folks follow that and do set them up separately. If they do not and there are issues there if they put that in and you ask the question in the HUD Exchange, we will try to help through what to do individually with that.

Marlisa Grogan: And this is Marlisa. I just want to flag for everyone that we do address more involved tactics such as counting persons served for rapid rehousing or homelessness prevention projects that have multiple funding sources in the guidebook. So in the eCART Guide, you can look towards the beginning when we mentioned just general guidance for how to set up your rapid rehousing and homelessness prevention projects in HMIS. But as Michelle said, if you do have specific concerns, please do submit in the AAQ and we can go through your situation individually.

Dan Fox: All right. I am going to try to take a couple of verbal questions here. I see that many of you have already raised your hands. So when I unmute you, you will hear a little message on your end saying that you are unmuted. Penny, you should be able to ask your question. Penny, are you there?

Michelle Budzek: Hi, Penny.

Dan Fox: All right. Let us move on then to Donald. Donald, you are unmuted. All right. Now you are muted again. Tammy?

Michelle Budzek: If you all have your phones on mute, when he unmutes you, you got to unmute your phone too.

Dan Fox: All right. Let us try Deborah. I can tell Deborah is on because she submitted a question. Deborah, go ahead and ask your question. All right. I am going to lower everyone's hands here. And if you do still have questions you want to ask verbally, just re raise your hand again. All right. Jeffrey, go ahead.

Joel Remigio: Hi. I think we are having issues, Dan.

Dan Fox: I think it seems that way. Remember, if you do not dial in with your pin number, I cannot unmute you.

Joel Remigio: Right. So okay. I think we are at the end of our time anyway. Are we not, Dan? So let us just say – maybe I should have kept my mouth shut earlier in that we have a whole bunch of questions that are unanswered and I am sorry we did not get to everybody. But we will dump all these out and answer them in some way, shape or form for you. You can also, of course, submit a question to the ask a question portal on the HUD Exchange. Make sure to identify your question. Categorize it as for being for ESG so it goes more directly to the folks who can answer it. Does anyone else have anything else to add?

Marlisa Grogan: No, I just want to thank everybody very much for tuning in. And we appreciate your patience with this new process and your dedication. And also, it is exciting to share this new stuff with ESG program reporting. We will be able to say a lot more about what ESG accomplishes on a daily basis in your community. Thank you.