August 2020 HMIS Sys Admin Webinar

0:00:00 Mary: We are going to get rolling here in a few seconds, I'm just going to walk through some housekeeping while we wait for our attendance to jump up. I anticipate we're going to have a very high attendance number today based on the topic. So, just as a few housekeeping notes, as everybody gets logged in, you will be muted throughout this entire session. The presenters are not muted, but all the participants are. We are going to record this, as we always do, we will post the slides, the recording, the transcript of the recording, all to the System Admin HUB, and send notice of that. It usually takes about a week to turn that around, but we'll get it out there as soon as we can.

0:00:55 Mary: As you are listening to our presentation today, and thinking through your questions, please try and give us a slide number, or topic, as you ask your question sometimes. And again, we're anticipating quite a high volume of attendees and questions, so sometimes your question isn't read, and so we're past that part of the slide. So just please make sure to remind us in your question, what it is you're talking about, as you're asking questions.

0:01:27 Mary: You're going to use that Q&A panel on the right-hand side of your screen, and you'll type in your questions, and all of us can read them. We will be answering as fast as we can. Sometimes the answer that you get is that we can't answer that right now, which is always unfortunate, we don't like to write that, but it does sometimes happen. And so, if that's the case, please make sure that you are entering that question into the HMIS AAQ, after the call is over. And again, the same thing, kind of reference that you asked this on the System Admin call, and you were told to put it into the AAQ desk, just so we can have the right context as we process through the questions. We usually need to do that if something doesn't have an answer yet, but also, if it might take a little bit more time to provide the answer to you.

0:02:19 Mary: So, participant numbers continue to climb as I am talking, so I'm just going to back up and make sure everybody knows [chuckle] what they're looking to, or what they... What meeting they're even on. So this is the HMIS lead and System Admin monthly webinar, and we're going to hear some HUD updates, and get ESGCV Sage training today. So, again, you're all muted, we're going to get rolling here, it's two after the hour, so kind of seeing the numbers slow down in terms of people walking into the call. So let's do some introductions real fast.

0:02:57 Mary: Today we have with us, as always, Fran Ledger from the SNAPS office. We also have William Snow from the SNAPS office, in the background as well. Screens are shifting around a little, here, but the TA providers on the call, Mary Schwartz, from Abt Associates, we have Meredith Alspaugh, and Michelle Budzek from the Partnership Center. We have Brian Roccapriore from Cloudburst, and Melissa is in the background as well, from C4 Innovations, helping us with all of the tech issues that go on in these calls. Never fails, there's always something.

0:03:36 Mary: So with that, like I said, we're mainly focused on our usual HUD updates from Fran, and we'll jump right in, and spend a bulk of today's training, on the training for ESGCV uploads in Sage. This training is dedicated to you, our HMIS lead friends. So, we're excited to be able to share that with you today, and Meredith and Michelle will be presenting that material. I'll also go over some of the latest RHY upload details, that HMIS leads need to know right now, and we'll wrap up the call with answering any additional questions that have come up. With that, Miss Ledger, take it away.

0:04:23 Fran Ledger: Thank you, and thank you everybody, for attending. It's great to see such high numbers today. We appreciate all the work that you do. We're grateful to have you. I'm going to talk about two things today, one is the calendar update that, hopefully, you saw that came out on the HUD Exchange listserv, and then I'll talk a little bit about some COVID documents that have come out, that I think that you should take a look at, when you have an opportunity. The listserv that came out recently, listed a couple of things, it was an update to the LSA work that is going on, the SPM submission, and then, to be determined on the HIC and PIT and William, we'll talk about that in just a moment. I'll turn it over to him, but he'll briefly discuss it.

0:05:09 FL: But what you see here is kind of a range of timelines, and of course, this is pushed out from what we originally anticipated. So we're still working with the vendors to do the programming and prep work, and that's going to continue for a while. The vendors have been diligently working, delays are not on their end, the delays are on our end, on doing programming work. We want to make sure that we have everything in place, so it's as smooth as possible for you guys, when you get to the point where you're doing the upload. So we appreciate you being patient with us, as we make adjustments to the calendar. So when we get to the point of actually asking for submissions, that it's as... Hopefully, as smooth as possible.

0:05:55 FL: What we are committed to doing, is to send out an announcement a few weeks ahead of time, so you know when that submission process is going to start. But you'll see some general dates down there of what we're hoping for. Also, you'll see the system performance measures, October 2020 is what we're looking for. And then, William, I don't know if you were able to get in and are unmuted, but if you are, do you want to talk a moment about what we're thinking about for the HIC and PIT?

0:06:33 Mary: I think he may actually have the wrong codes. He might be...

0:06:39 FL: Okay, so what we'll do is, I'm going to go on and talk about some of the documents that I think are helpful for folks to take a look at, and then I'll turn it back over to him, if he's not on, we'll hear from him, later on the call. So not to worry. Let's take a look at some COVID related resources that have come out. One of the most recent ones is a victim service provider comparable database and reporting requirements document, it's the first bullet that you see there. What's nice about this document is it's the first time we've packaged everything together in one place. It is being put out, because of COVID, and we would like things to be packaged in a way that's easy for people to gain access to, and look at, and it being the context of COVID, but it really looks at all of our requirements for comparable databases across the board and what is required of victim service provider. So if you wanted something easy to read, easy to share, I think that's a great resource to go to take a look at.

0:07:44 FL: The first link on there is the link to all of our COVID HMIS related documents. You can go there and find all of the resources that have been published to date. Some of the other things that are interesting on there... I'll just bring your attention to the Public Housing Authority data sharing agreement document. For those of you that are interested in privacy work, that is a document around privacy and there are few others about privacy, that are on that main link, to take a look at, as you think about privacy and COVID related discussions you need to have in your community.

0:08:22 FL: And then, as the HMIS leads are working with the ESG recipients, there's a few of those other documents that can be helpful, which is things about thinking about budgeting and allowable expenses. So you'll see those documents also listed there. So I know everybody is working to help support our communities, and our partners, and our participants, and making sure everybody is safe, and housed quickly, I appreciate all the work that you're doing. Thank you so much. William, if you're on, do you want to talk about HIC and PIT for a minute, before we turn it over to the next subject?

0:09:01 William Snow: Sure. Can you hear me?

0:09:04 FL: I can.

0:09:06 WS: Cool. So there's not a lot to say, just to be clear, but the one expectation that we think should be most clear, as we think about 2021, obviously safety is going to be our number one principle. You should expect doing a shelter count, the sheltered and the housing inventory count, we don't anticipate a change there. We actually, if nothing else, need to know your inventory more than ever, because of COVID. So that isn't a 100% set in stone, we still need to clear everything with all the right people, but that's an expectation, I want to set. You're likely going to end up doing both the housing inventory and the sheltered count. Unsheltered is a total unknown, we don't know, we're looking at different options. At this point, you should expect that you may have to do a count though. I wouldn't write it off all together. So just putting that out there, less known on unsheltered, and highly likely, you're going to do sheltered and we'll notify everyone via Listserv.

0:10:11 FL: Okay, so there were quite a few questions of just confirming the date, so we went back to the date slide, while William was talking. You guys definitely keep submitting your questions about deadlines, if things are not clear from the dates on the slides there. But while we're observing some more of those questions, it does seem like there's a little bit of... Some people are having audio issues, but it's not widespread, so far, as we can tell right now, so our sound and slide show is coming through to the majority. If you're having trouble, please log a ticket and Melissa can... Or log a Q&A, and Melissa can help walk you through. Okay, with that, Meredith and Michelle, our Friends from PCL, take it away.

0:11:04 Meredith Alspaugh: Thank you. Hi, everyone. Thanks for joining us today. We are going to talk about ESGCV uploading in Sage. So I'm going to walk through a few slides, and then we're actually going to dig in and do a demo with Sage, so you can actually see what this process is going to look like. Michelle is going to be coming in behind me, answering any questions, chiming in on anything that I might forget to say, there's a lot here. So let's dig right in here.

0:11:36 MA: So just real quickly, simple... Relatively simple, high-level overview of who's doing what here. There's kind of three key players in this world, ESG recipients, subrecipients, and then the HMIS lead/victim service provider. So the ESG recipients, they're doing the funding allocations, they're contracting with subrecipients, they're the entity that is responsible for doing the Sage report submission. They are the ones who are logging into Sage, creating all of the information that needs to go into Sage, and they're the only ones that need to be going into Sage, to doing that. So we'll talk a little bit more in detail here in a second, but I just want to do this high-level overview.

0:12:19 MA: You've got subrecipients, they're operating the project. In some cases, they might be subbing with what we call sub-subrecipients, but they're not doing anything in Sage. They're not uploading any CSVs. They're not logging in to Sage for any reason. They're running their programs and working with you at the HMIS leads. You all, are setting up the projects in HMIS, you're doing your comparable database. You're setting it up in your comparable database. You're closing projects when they should be closed. And then you are the ones responsible for submitting those ESGCV reports in the Sage report portal, which is what we're going to look at today.

0:13:01 MA: So again, just a little more detail on recipient role here. They're logging into Sage, they're recording information about starting dates. They are identifying those HMIS lead or victim service provider contacts for every HMIS implementation in the jurisdiction. So I know you've heard us say this 100 times, I'm going to say it 200 more today. If you haven't connected with your ESG recipient yet, you need to do that. It is very important that you know who your ESG recipients are and they know who you are and who's going to be responsible for pulling this information from your HMIS or your comparable database.

0:13:39 MA: The recipients are also responsible for entering every single ESGCV funded project in their jurisdiction. So it's, again, back to our communication, it's critical that you all are communicating about all of the different projects that are being funded by ESGCV, so that they have the right list and you have a matching list and we'll see why that really comes into play when we look at Sage here in a minute. And then again, the recipient is responsible for recording their narrative information, their financial information, all of the other stuff related to the report, it is the ESG recipient's responsibility to take care of that, not the HMIS lead, not the sub-recipient.

0:14:22 MA: So talking then about what the subrecipients are responsible for. They're doing the coordination with the recipients on doing the contracting, eligible projects and activities, so on. If you're in a situation where there are sub-subrecipients, they are coordinating with those sub-subrecipients. If you're not clear what we're talking about, when we say that there are some circumstances where a state may provide a city with ESG funding and then that city turns around and sub-awards that to the actual provider agencies, that's who we're talking about when we say sub-subrecipients. So it is critical that the recipients know who those sub-subrecipients are also. So again, if you're in one of those situations where funding is going from one recipient to a sub-recipient and then to another layer of sub-subrecipients, please make sure that's being communicated.

0:15:16 MA: And so again, you should also be, and I think many of you are working with those subrecipients also on doing project set up, making sure the data collection is configured correctly, the sub-recipient then is going to run the program. They're going to operate the program like they typically do. They're going to be maintaining, making sure they're doing good data quality, that they've got the completeness, the accuracy that they're entering it in a timely manner. All of those things we're used to having conversations about what HMIS data quality, we want to make sure they're doing that.

0:15:52 MA: And then, moving into your responsibilities, so what are you doing as the HMIS lead? We've talked a lot in the last several months about projects and when to open projects and when you need a new project. Just a reminder, the ESG manual has information about projects set up, and if you have questions, please look there first. But just some highlights on that, you will need to open a new project for a temporary emergency shelter for rapid re-housing or homelessness prevention projects, those all have to be their own new projects. Existing emergency shelter projects that are now receiving ESGCV funds don't need to have a new project set up. Similarly for a street outreach project when the funding is within the same jurisdiction, you don't have to set up a new street outreach project.

0:16:44 MA: However, if you do start a new project, you're going to want to set up a new project in HMIS. So if there is a new shelter or a new street outreach project, you're going to want to make sure that you're setting up a project in HMIS. You can look at the project set up tool if you need more information about that. Again, also the ESG manual is going to have information about that too.

0:17:07 MA: And then a really key point here is making sure that you're closing projects when they have ended, and we'll talk a little bit more about that moving forward. But when the funding stops for the projects, so if you've started a temporary shelter project and the funding stops and the project should be closed. So making sure that you're paying attention to those timelines, to those dates of when projects are starting and stopping.

0:17:37 MA: We've also seen this chart before. We wanted to just show it again, where we've got the ESGCV components, the expenses, and the CSV submissions. So again, temporary emergency shelters are going to be their own projects, their new projects in the HMIS. They are in their own bundle in the HMIS or in the CSV submission, and I wanted to share... We get a lot of questions about, what is a temporary emergency shelter? The definition... We've all been waiting for a notice, we are still waiting for a notice, but the working definition that we are using at this point from HUD for a temporary emergency shelter for the purposes of HMIS project set up, is that it's a structure or portion of a structure which is designed to provide shelter for individuals as part of preventing, preparing for or responding to Coronavirus, but would not meet ESG shelter standards at 24 CFR 576.403. So for example, a structure without walls or floors, that does not meet those standards. There will be, I imagine, additional information in the notice, but for this point right now, this is the working definition that HUD has allowed us to share.

0:19:01 MA: There is also then the emergency shelter component for the normal shelters. Again, we've talked about this before, but keep in mind that there are multiple project types that fall under the emergency shelter component. So that could be your regular emergency shelter, that could be day shelters. If you had a grandfather transitional housing project that could be included in there. So it's important to keep in mind when we're talking about the bundles, which we've talked about before, we're talking about bundling by these components. So when you're bundling your emergency shelter component, you may have multiple project types in there. And as a reminder, the vendors have told us that they all can generate these reports across multiple project types. So you should not have any issue with that.

0:19:54 MA: And then finally, we've got the street outreach component, that's going to be a Project Type 4, Rapid Re-housing is Project Type 13, Homelessness Prevention, Project Type 12. I want to put a plug in here also, that you'll notice when you look through these different project types, there is no services-only project type for ESG funding. So you'll need to make sure that you are using the correct project. So if it's funded under the rapid re-housing component, that you are setting up rapid re-housing projects. If your project is funded under prevention, but maybe you're only providing services, it is still a prevention project, it is still a Type 12 Project, and you need to have it set up in the HMIS that way. The project types are going to be really important, as we get into doing the uploads into Sage, because we're validating against those.

0:20:46 MA: Should I pause for a second? I see the bar moving, but I'm not watching the questions. Michelle, is there anything to say or add, at this point?

0:20:56 Michelle Budzek: I think, no. No.

0:20:58 MA: Okay, okay. So let's talk a little bit more, about bundles. Can't say enough about bundles. So for each report submission, anywhere that clients have been served, the bundled CSV uploads are going to be required. So the ESGCV report, again, like we all know, is the ESG-CAPER report, it's already programmed in your system, it should already be working, it is already being submitted by subrecipients, so you should be squared away with that report. VCSVs are to be generated by the HMIS lead, or the victim service provider, and only by the HMIS lead, or the victim service provider. Subrecipients are not generating these reports. Again, as I said, the reports are bundled by the component. You will receive information about date ranges in the email from Sage. We'll talk about that, and then you're going to be submitting these bundles for quarterly and cumulative report.

0:22:04 MA: Just a little more about bundles. So the bundle is a way to aggregate the information from multiple projects into a single report. So we're doing this to the extent possible, we are doing this to de-duplicate clients served. We know that, typically, in the ESG program, every sub-recipient is uploading their own CSV, we are counting people multiple times, that have been served in different projects. So we are trying to, to our best extent possible, de-duplicate those numbers of people served, so that HUD has accurate information for reporting purposes. I also want to add in here that, again, the victim service provider is going to be the entity responsible for creating the bundle, from their comparable database. There's not an exception template for the ESGCV report. The victim service providers need to be able to generate their report from their system.

0:23:16 MA: So I noted that the bundles are submitted by component, so you're going to have a shelter bundle, you're going to have a prevention bundle, you're going to have a rapid re-housing bundle. It gets a little bit more complex, when you start talking about some of the dates, and starting... Late starting projects cum late starters, or projects that are ending early. So I want to dig in, just a little bit, about late starters and early enders.

0:23:43 MA: So rapid re-housing and homeless prevention projects that start after October 1st are going to be reporting on the first day of the quarter that they're funded. So if their funding, let's say, began on October 15th, they're still going to start their reporting on October 1st. They'll be set up as new projects, in the HMIS, because they're supposed to be, but they will get bundled with the other RH, or homelessness prevention projects, that the recipient funded and they will provide regular, quarterly and cumulative reports, once they've been added into the system. So from there on out, they're going to get lumped into that cumulative report, that is being requested by the recipient.

0:24:32 MA: Now, for existing shelters or the outreach projects that we were talking about, that don't have to have new projects set up, if they're funded after October 1st, and they didn't have any CV money prior to that, their data is going to be placed in a quarterly CSV upload, beginning on the date of the month that they started. So not the beginning of the quarter, they're going to go with the date, the first of the month, that they started operating. The data is not going to be included in the cumulative shelter bundle, for these projects. They're going to have their own separate bundles, so their dates are going to be different, they're going to have a different bundle.

0:25:18 MA: That's really important to keep in mind. Again, thinking about when these projects are starting, hopefully, in a smaller community or a smaller COC, this is less of an issue, but it is entirely possible in the states, or the large cities, that there are going to be new projects funded after October 1st. There's going to be a need to send down money for some reason, and so they're going to start up new prevention projects, or rapid re-housing projects, or maybe even money goes into a shelter project, after October 1st. It's going to be really important to keep track of those dates, of when those projects are starting. And then again, making sure you're communicating with your recipients about the dates that those projects are starting.

0:26:08 MA: And then finally, making sure you're reading what Sage tells you to do. We have spent days, weeks, maybe even months at this point, working with HUD to refine how these dates are supposed to work, with project starting either late or ending early, and stations and programs to pick up the proper date. So it should work just fine for you, when you just follow the instructions on the Sage emails and the Sage reports.

0:26:42 MA: Okay, so those are late starters, then you might have early Enders. So like I mentioned, you may have projects that you need to close. So there may be a temporary shelter that was opened but is now closed, you'll need to make sure that project is closed out in the HMIS. Similarly, if it's a prevention or a rapid re-housing project, make sure that those are getting closed.

0:27:06 MB: Meredith, if I could, just a minute.

0:27:12 MA: Yes.

0:27:13 MB: So folks are concerned... Are questioning the dates. If you think in your mind, about quarterly reporting, what's going to happen is, the first report is going to be longer than one quarter, we're calling it an initial report. It can go back as far as January 21st, if they started serving clients as early as January 21st, or they'll be able to start that any time between January 21st and September 30th, that is the correct time to start it for their community. So they're going to try to start the reporting start dates, all together, hopefully. I would say, mid-session, probably, is when they would... Mid interim period, is when they would have probably done it. Now, I need to tell you, some of them have not done anything yet. So those won't have any reports. But for the ones that have started, they're going to set their start date and whenever then, a project starts, they set their own start date. So you do that first initial period, then you go into quarterly reporting. And then after that initial period then, the quarters are quarter one, quarter two, quarter three of the fiscal year.

0:28:40 MA: Thank you. Yes. Okay, let's keep moving along. So that's talking about project management, and HMIS set up. The other big part of your role here, as HMIS lead, is doing the reporting. So at the end of each quarter, you're going to receive an email from Sage, all of the people that were identified as the victim service provider contact, or the HMIS lead impact... In contact, sorry, I can't speak. Will receive this email from Sage, with a link to the report portal. So you do not need to log into Sage, to access this, you only need the report portal link. This portal is going to contain the list of all of the CSV bundles, that will need to be generated, and what projects specifically, are included in the date range for HCSV. So again, like Michelle just said, in the initial upload, there's not quarterly and cumulative, there's just one, and subsequent reporting period, so there will be multiple bundles. You'll have your quarterly and your cumulative.

0:30:03 MA: It is critical that you review the HMIS lead contact, VSP contact, review the list of projects, within 24 hours. So, there is a 24-hour grace period, where you can look at the list of projects and say, "Nope, this is not my project," or, "Whoops, this project is missing." If you find that your list of projects isn't right, you need to contact your ESG recipient immediately, within 24 business hours, one business day, because if your bundle has an error in it, it is very likely, that another entity's bundle also has an error in it. So if your project... If you have an extra project, that means someone else is missing a project. So it's going to be really important for those recipients to get that corrected on their end.

0:30:56 MA: Also, if there's questions about the date, contact the ESG recipient. The information in that email from Sage, and in the reporting portal, is the required information for uploads. Your uploads won't validate and won't be allowed to be uploaded, if it's not all accurate. So again, you don't need access to Sage, you only need access to the report portal. And recipients are the ones that are responsible for identifying all of their projects, so they're the ones in Sage, entering all of that information. It is not the HMIS lead's responsibility.

0:31:38 MA: This is just a little calendar reminder here, of timelines. So you'll see there, that initial one, is from the start through September 30th. The reports are due within 30 days, after the end of the quarter. However, keep in mind, that when the report is due, that's not necessarily when your recipient wants you to give them the CSV uploads. So the recipient will set a due date for you, and it will be in the email that you receive.

0:32:12 MA: Okay, so I'm going to switch over to Sage, and we are going to start looking at the report portal here. I can't see anyone, but hopefully, you can see my screen. Okay, so we're going to go straight into the report portal here. When you get your email from Sage, it will tell you instructions for accessing the portal. So, you are going to click that link, and you will be taken to this page. So you'll see on this page who the ESG recipient is, that is sending this to you. There may be circumstances where there are multiple ESGCV recipients, that you're working with, within the city and the county, city, county and state, so you'll want to make sure you're checking who is sending this to you. You're also going to see the report period for which they are requesting these reports. So you can see here, this is from February 1st, through 9:30, you can see who they are sending it to, we're using a test data here, but we're using Alabama.

0:33:34 MA: So one Ruth was the contact person entered in here, and then you'll see the contact information for the ESG recipient. So within those first 24 hours when you're taking a look at this and you find an issue, that's the person you need to reach out to, that's the person who's going to be able to help you get your project figured out for what's supposed to be included. After 24 hours, the portal will begin to accept your submission, so that 24 hours again is like a grace period to make sure everything is right, you'll wait until that 24 hours has passed and then you can begin uploading your file. It is imperative that the CSV is run for the exact date range specified on each line, as well as that all of these projects are included in your bundle.

0:34:28 MA: So we're going to look here specifically at this request for emergency shelter bundles. So you're going to see there's a name here, this is what the ESG recipient has called this bundle. You can see the component type, emergency shelter. You can see the report date range two one through nine 30 and that this is a quarterly report, and that there should be 16 projects in here. Sage will tell you those projects with the organization and the project name. Okay, so you're going to generate your ESG-CAPER using the CAPER report, you're going to generate your ESGCV CSV for uploading into Sage. Once you generated it, you're going to click on the upload button and that's going to take you to the upload page, the bundle upload page.

0:35:25 MA: So again, you're confirming that you're on the right page, you've got the right recipient, you've got the right component, right dates, the right bundles. You're going to see here on this initial upload that you do, this table is going to be blank, but moving forward and future uploads, Sage is going to populate the org ID and the project ID to hopefully make it a little easier on you to make sure that you're getting the right projects in your submissions. So again, I've got 16 different projects here, I've already made sure that I've got my 16 different projects run together in a single CSV. I'm going to come to where I've saved that file. This process should seem pretty familiar for those of you that have uploaded anything in the Sage before. You select the file, not a robot, upload report.

0:36:26 MA: So that report worked properly. It passed all the validations, it had all 16 files, it had all of the right projects in there, it had the right date range. Just real quickly I'm going to do one that doesn't work. So Sage is going to tell you when you try to upload something what's wrong with it. So it's going to tell you that the project type is wrong, that it only had a single project in it, that it should include one of these types, that the report start and end dates were wrong. So again, it's going to be really important to follow exactly what is on the email or on the screen here telling you what to upload to make sure that it is successful.

0:37:20 MA: So let me go back and add my proper file here. Okay, so I've uploaded my file, it has passed all the validations, super, now I'm going to see this table here where I need to just verify that the projects are uploaded, that the right projects are uploaded. So we've got this column here, we call it the matcher column, and this column here is what the recipient has called the project in the Sage System. And this column here where it says project name, this is what's in Q4 from the report. So from the upload it is listing out every single project name and organization name.

0:38:13 MA: We know, and we've talked about this before too, that sometimes the HMIS has a strange name for a project that doesn't really make a ton of sense to everyone. It might make sense to the HMIS lead, but maybe not to the recipient or vice versa. And similarly, we see that recipients put strange names on their project. They often use a contract number or append some other string of numbers and letters to a project, sometimes they don't even use a project name. And so it's kind of hard to tell if what they put in as shelter one... Well, if you have 14 shelters, how do you know which one is shelter one, right? So it's going to be really important, and that's why we were pushing this issue months ago, to make sure that you're thinking about what your projects are named, and that you're communicating with your recipient about what they're calling the project also, so that you can make this match.

0:39:14 MA: So you're going to identify the project from their list and make sure that it matches the project that you have included in your CSV. So I've got here city and county of Mobile Baldwin County Family Haven Emergency Shelter. Okay, well, that is city and county of Mobile, family haven, that's a match. So you're going to select that that's a match. You're going to have to select your matches for every project that's in the upload. You can only take a project once, so you're going to have to make sure that you are carefully selecting the projects that should be included. So give me one second, and I will select all of these.

0:40:12 MA: So there's an example, I picked the same one twice. Sage is going to notify me that I've done that, and I cannot do that, so I need to pick a different project. So I need to go back and actually pick the Love Center... I know it's tough to pick up a big one, but I wanted you all to see all of the different issues that might come up here with these large ones. Okay, so I've gone through now and I have selected, I have confirmed Yes. Their list matches my list. This project is this project. We are good to go. I'm going to come down here, I'm going to look at Q5, and I'm going to look at the number of people served. This is the validation table from the CAPER. Again, this is something that is typically visible when you do an upload into Sage.

0:41:10 MA: And you just sort of want to do a pulse check here. If you've uploaded 16 files and this shows that you had five people served, something might not be right, something may not be working correctly. So you're going to want to make sure that you go back to your HMIS. You go back and make sure that your CSV actually included data for all of those projects, that you have the right projects in there, whatever it might be. But you're going to have to go back to your HMIS to fix that, you can't fix that in the CSVs. You have to go back to the source.

0:41:46 MA: So then once you have verified, yes, 1000 people seems right, 619 adults, yes, this all checks out. You're going to select attach to jurisdiction, and that's going to put that bundle on the ESG recipients dashboard. So they will now know that you have submitted your bundle for their report. And they just going to think for a second bundling it all together. Okay, and now you can see that Sage has... So that table we were looking at that was blank earlier, Sage has added organization ID as well as project ID to that table, so that that information is now in there and will continue moving forwards. So you have finished with this and you can go back and do your next bundle. So your portal is going to tell you your status of all of the different bundles you need to do. So that one is done and you've got four more that you need to do here.

0:42:53 MB: Meredith, while you're on that page...

0:42:57 MA: Yeah.

0:42:57 MB: Can I stop you again? So can you scroll up a bit for me, thanks. See the report date range in here, folks. The date range that's in this bundle is the date range that you will run for all the projects that are in this bundle. So you're going to say in your HMIS that you're going to run an emergency shelter paper report, the report for all these emergency shelter projects. And it's going to run in one report for that date range. Whenever the recipient has started their period, they will set the date range and Sage will tell you what date that is. Likewise, if the project ends, Sage is going to tell you to end it. You must run the report by the date ranges that are set up there.

0:44:02 MB: So you do not have to worry about setting up date ranges. I could just feel you all panic, not knowing how to do this for each one. It's really complicated, and we've taken the complication out of it, we hope, for both you and for the recipient by having Sage really program how the date ranges will work for each project and what bundle each project needs to be in. So trust the date ranges. When we say you have 24 hours to check this information, so you're going to get this portal, it's going to look just like this, you're going to see all these projects listed. And you're going to say, We didn't start a family connection project. We don't have family connection day shelter, that's not ours, we don't know what that is. Perhaps they put it in the wrong HMIS. If it's a statewide implementation that could easily... Not easily, but it could happen.

0:45:15 MB: Perhaps they forgot to put a project and you're looking at your list of RRHs and you think, "Hey, wait a minute, I have one more RRH than they're showing on this list. What happens to that?" That's the 24-hour period that we need you to call. We don't need to you to run these things in

24 hours, we don't need you to test them in 24 hours. We just need you to look at the list and if something is obviously wrong, we want you to stop the submission. Your call to the recipient is actually going to stop that submission across the whole jurisdiction.

0:46:00 MB: So if in California, they screw up in LA, and LA catches it, and LA stops the whole transmission, it's going to stop it for the whole state of California, because the bundles are wrong and we'll have to rebundle. So, the only thing we're asking you to do is just take a look and make sure it looks like it makes sense to you. And because you know what's going on on the ground in your implementations and you're setting up all these projects, you should have a good sense of yeah, they got them all or not. The ones we're showing you are complex ones. This is a state. If you're just working with a city or a county, easy-peasy. It's really not going to be a problem, you don't have that many shelters, it's not going to be that difficult. You know these folks. It's the state folks, the people that are going to have to do the ESG state submissions, that are going to have to just take a little more time and check it out in that 24-hour period. Thanks, Mer.

0:47:13 MA: Oh yeah, anything else? Any questions that have come in that we should address while we're here?

0:47:21 WS: There's a question about if they have to re-bundle everything, every time, or if projects, once bundled, are there for the next reporting period.

0:47:33 MB: So each time the state, the city, the county, the territory, that's the recipient, creates the bundles, they tell you what's in each bundle. They do that, because Sage is going to tell you, you can't bundle in advance, because the reporting period isn't ended in advance, and you don't know the date ranges for every project, you don't know if they stopped funding an emergency shelter. For your purposes, that ongoing shelter, is ongoing, it never stops, people keep coming in going out. If the ESG funding stopped on that, they're going to come out of the bundle, either the quarterly, or the cumulative, they're going to come out of a bundle at some point, and you're going to need to take them out. So you can't plan in advance for that, you have to wait till they tell you it's in the bundle. And yes, if they move money around a lot, in the jurisdiction, you're going to re-bundle all the time.

0:48:39 MB: And let me give you my favorite example about that bundling. If the community said, "We're going to use ESGCV, and we're going to respond to the COVID... The initial COVID outbreak," and so, they really ramp up to spend money in their shelters, and hand washing stations, and getting street outreach people. Somewhere where they're safe and doing all of that kind of street work, at the beginning. And now, today, as the moratorium over evictions has ended, and all of a sudden, people are being put out, they want to now begin to fund RRH. They could start an RRH project now, because that makes sense in your community to do that, or they could start a homeless prevention project now, because that makes sense in your community to do that. So they will start and stop projects over this period. It's not a one-year period, it might go on for three years. So they will start and stop projects over that period, and your cumulative report will be required to be generated, as we tell you, for the time periods and the projects in that period, that are active, so that we can keep that cumulative thing going. Yeah, I think I might have confused them more.

0:50:14 MA: Do you think it's helpful to look at what the recipients are doing? Just take a quick peek at Sage, beyond this or...

0:50:24 MB: If you show... If you open up the screen where they identify the HMIS leads, they certainly don't understand that, so let's open that screen.

0:50:38 MA: Okay.

0:50:40 MB: So, in your... Yeah, so in the Sage report, they will add the name of every system administrator, system contact that they have for HMIS. Can you do an add button? Hit the add button there. They're going to put in exactly who you are and what... And give a name to your HMIS, that they'll be able to recognize and save that. This is how you get notice, that your CSVs are due, because they have put a name for every HMIS lead in the country, in Sage, somewhere, in the recipients. And remember, one HMIS system, in a city, could have city bands, could have county bands, could have state bands, you may be the lead for all three of those, you may only be the lead for one of those, it depends on how your office works and how you set that up. Please remember, there's funding for this, so that you shouldn't be trying to do this on the cheap, they should be funding you to be able to support your work here, because it's not simple, and we get that. And HUD has really supported HMIS leads, getting paid from the ESGCV money, to be able to make these reporting things happen. Go to the projects, near the... Where they enter the projects. The ESG-funded projects are here, so they enter exactly their funded project, right here, and it comes in. Can you...

0:52:42 WS: Get rid of the bundle. I got to destroy the bundle, to do that.

0:52:46 MB: Oh.

0:52:48 WS: Hold on. Well, I submitted, so it's not going to let me destroy the bundle.

0:53:00 MB: Okay, never mind. They actually set up every project, in a tab, so it's harder for them to get confused and get the project in the wrong spot, because they've got a spot for everything. And when they actually look at the subrecipient and sub-subrecipient's name, they get a drop down list, and we have painstakingly gone through our ESG submissions, and your CSV uploads, to those submissions, and have identified, to the extent we could, the name of the organization that you actually call the organization on your end of the run. So if it's a ABC shelter, in your community, if that's what it's called, hopefully, it'll say ABC shelter, as a sub-subrecipient. And it definitely will, if you actually named your project ABC shelter, but because so many of you, name your projects by some kind of system that you have that nobody else understands, it's not the exact project name as it's supposed to be, then we couldn't figure it out. And if you're one of those HMIS places, then you really need to talk with your lead to make sure that you're both on the same page of what you're calling the projects. Thanks, Mer.

0:54:29 MA: Yeah, I want to add in here just a couple of points because I thought I scrolled through some of the questions quickly. So, the training we did with you all is how to do your CSV uploads. The trainings that you saw those emails come out about, they're our recipient training for the actual ESG recipients who will be trained on how to fill out all of these other forms in here, all of these other steps, what projects to add, all this stuff about dates. We're going to work with them on getting all of this information completed. So when it comes to you, like we've said, ideally, it's all done. You're following the instructions on that report portal that you received or that you're clicking into, and it's telling you everything you need to know about how you're going to generate your reports. So, that's why we're not going into the detail here on what the recipients are doing. They are being trained on that separately. Your focus is just on that report portal and following those instructions in there exactly.

0:55:41 MA: The other thing that we didn't see when we clicked through there, but I'll just say it out loud, so in that email, you will receive the due date from your recipient, also. So again, like I mentioned, the reports are due within 30 days from the recipients, they have to submit it in 30 days so they're going to want it back from you at some point, and they will enter in an actual due date that they would like you to submit that to them.

0:56:07 MA: Okay, I think that was all that I wanted to make sure we saw in Sage. So I'm going to stop sharing my screen at this point and just take a couple more minutes to hammer home a couple more points here, takeaways. Talk to your ESG recipients. The sooner, the better. Frequently is good. [chuckle] Talk to your recipient. You need to make sure that all projects are accounted for and typed correctly in your HMIS. You should be identifying who the lead... Who the contact person is at the HMIS lead, that should be working with the recipient for this ongoing reporting. States that have a state-wide implementation, we've talked about that there may be times where there's more than one HMIS lead in that state. We encourage you to work together to determine who will be responsible, a single entity, a single HMIS lead, be responsible for generating these reports. Make sure you're communicating that with your recipient on who that contact person should be.

0:57:18 MA: Remember, opening and closing projects in HMIS is going to be really critical. Every victim service provider agency should be using a comparable database. I hope we have some VSPs on here. I think I would put a plug in there though, to those of you that know your victim service providers in your communities and they've been struggling with this, you might want to prompt them or give them a little heads-up that they need to make sure that they have an actual comparable database, and that they could actually generate the ESG CD.

0:57:51 MA: And then finally, again, I'll say it another time: Follow the instructions in the report portal exactly. So follow those dates, follow those project types, and upload exactly what Sage is looking for. Again, [chuckle] we've tried very hard to make it as simple as possible because we know it's a really complex process, but if you as the HMIS lead are just following the instructions in the report portal, you should get the CSVs exactly how the recipients need them. Okay. That, I think, is all I have got to say about that.

0:58:34 Mary: So there's still a few questions being answered actively, it looks like most questions are assigned to be answered. We did notice that a few people have their hands raised in the Adobe Connect Room, but we aren't unmuting anyone so the raised hand isn't going to get your question answered. Typing your question into the Q&A box will.

0:59:00 MA: Oh, can I say one more thing?

0:59:01 Mary: Please do.

0:59:04 MA: Questions about Sage, questions about this reporting process. When you are going to ask an AAQ and we encourage you to ask AAQs, make sure you're selecting the Sage box so that we can get those triaged to the folks that are working on Sage. So if there's some issues that are related to Sage, we can address those as quickly as possible. Please submit them to Sage.

0:59:28 Mary: Yeah, good point. We always say submit to a HMIS AAQ and that's what these slides would instruct you to do at the beginning, but if this was Sage that system Meredith was just showing us, if there's a question about that, it should go to the Sage desk instead of HMIS.

0:59:45 Mary: We work very closely together though, so if you get it wrong, it's okay. We'll get it triaged as fast as we can, but accuracy equals quickness. Okay, you guys ready for me to move on or do you want to stay here for a sec and answer any more questions verbally, Meredith and Michelle?

1:00:08 MA: I would defer to Michelle. I'm just scratching the surface of questions.

1:00:14 Mary: You guys are asking such great questions, and I would say too... It doesn't look like confusion to me, at least it's new to us and you and everyone, and it's going to be a big hard job to get through the first couple upload cycles.

1:00:34 MB: And there is no question... There's no question that next month, we'll do this somehow again for you. There's no question that you'll need more support. I can see it. [chuckle] It will make sense to you when you begin to receive it much better than it's making sense to you now though. And just remember, it's not your responsibility to create the bundles. You didn't fund the projects, the recipient did. So the recipient knows who they funded, they're going to tell you who they funded, and they're going to tell you... And Sage is going to tell you what date range to run. So once you get that information from Sage, you're going to have to do it. If your system... This is a report like an APR or CAPER report. They're not auto set up or auto-populated in your system. You're going to have to run them every quarter, but you only have to run them for the periods we tell you each quarter. I hope that helped.

1:01:44 Mary: Well, I think just some of the anxiety for HMIS leads, if I were to channel it a little, it's just like, "What if it's wrong? What if they don't know? What if they don't know me and I don't know them?" And so that's why I agree. We're getting this out here early, we'll touch on it again at the next HMIS lead call. You guys know... Meredith, did you say this already? I was answering some questions and not totally listening, but there is a training next week for the ESG recipients.

1:02:08 MA: Mm-hmm.

1:02:09 Mary: And...

1:02:09 MA: And yes, I mentioned that.

1:02:12 MB: And please know that one of the things we're going to say to them really strongly is if they have never met you, it is their responsibility to reach out and call you and make a connection so that they actually know that person on the other end that's doing this. So it's not like you're just sending this to the big black hole in the state, but you and a person at the State have made a connection that then you can work through issues on. So we're... As much as we're encouraging you to contact recipients, we're encouraging the recipients to contact you, because it's that personal relationship that's going to make this much easier for all of you.

1:02:58 Mary: Okay, I'll let you guys keep going on answering those questions that are remaining... That folks still have, and we can always circle back if you feel like there's something, Michelle and Meredith, that we need to just clarify verbally again before the call's over. How's that sound? Okay, so moving right along, upload process number two today to discuss the RHY, we wanted to give you HMIS leads the heads-up that RHY grantees should have received an email Monday for access to the new RHY-HMIS repository. So this is going to look a lot like the VA side of uploading. Not like the Sage side of uploading stuff, but hey, aren't we living in the future of HMIS here though. Everybody's pulling files of data out of HMIS, not hand typing in stuff very often anymore.

1:04:05 Mary: So, we're getting there. RHY has always accepted, or for the last couple years, has accepted CSV styles of hashed client data through the RHY Point. The RHY point system is no longer, it's a new upload repository. It's a one-time for this fiscal year, uploads are coming up. The upload dates that RHY grantees need to upload their files during are there at the bottom of your screen. What happened last week is the HMIS vendors got testing accounts to upload test files, and RHY grantees this week have testing accounts to upload test files.

1:04:48 Mary: Some RHY grantees don't have access to test data, and we don't want them to upload real client data yet. So if they want to test and they don't have access to a test file, we've been pointing them back to you HMIS leads. Say, "Hey, ping your HMIS lead. See if they have any test data sets you could use to do an upload." This is just a heads up to you HMIS leads. If you want to help your RHY grantees with a little testing, engage with them in that process, it's live and active right now to do testing. We're kind of gaming out a whole bunch of other things, like whether people even have user accounts in the new system and if all the right contacts are in place, so a lot of that is part of the test too. And again, the HMIS vendors went through testing last week, and absorbed some of the error message testing with actual uploads.

1:05:42 Mary: If you are in a implementation where HMIS CSV exports for different vendors like SSVF and RHY need to be generated by you as a HMIS lead, just make sure you're aware of those upload dates that are coming up for the RHY grants that are ending this fiscal year. They have an early upload time in September, and then for folks whose grants continue on past this fiscal year, they have a little bit later upload period in October and early November. So that's what's happening on the RHY side of things.

1:06:24 Mary: And I think that the bulk of information we wanted to share with you today, so again we're going to circle back through and see if there's any more questions that we can help address while we still have a little bit of time left. These are the resources. This resource page is always available to folks at the end of the slide deck with all the things we think you might find helpful. And just as a reminder, you get on the HUD. You log into the HUD to get access to the resources that we post after these meetings and any other kind of things we can post early before they make their way to the HUD Exchange. We send email announcements every with whatever new update information, but also to give you the link to each of these meetings. They'll come through the HUD emails but you need to set your own calendar appointments for this third Wednesday of the month meeting at 1:00 PM Eastern time.

1:07:25 Mary: We will give you the link to those meetings, but you've got to reserve the time yourself on your calendars. And if you had a HUD account at some point or you stopped getting the emails or it's just something went wrong and you don't have the emails anymore coming from the HUD or you can't get in, just remember, and this is new information, we found out the HUD does purge inactive users on some periodic basis. So, get in there, log in, and grab last month's upload and PowerPoint presentation. There's a lot of great HMIS projects set up, information for ESGCV grants in the last couple of months' worth of presentations that we've done on the fall. So that might help answer some of those set of questions you're having too and would be a good way to test your hardback.

1:08:14 Mary: And, we'll talk again. Again, the third Wednesday of every month is our regular schedule. We'll add to this as we need to. We'll remove meetings if we don't have anything to say to you, but that's not going to be the case all the way through this fall. We'll definitely be touching on ESGCV uploads again in September on the September 16th call as well as... I would imagine we'll be doing some LSA data quality and kind of prep for error-checking as LSA upload start, would be my guess. So, Brian, Meredith, Michelle, Fran, William, any questions we should go over verbally?

1:08:57 FL: Yeah. Thanks, Mary. There was a question about going back to the multiple HMIS Lead but it stayed in how many bundles need to get submitted. There were different answers given so I just wanted to make sure that we were clear about that. Meredith, do you want to reiterate that one or Michelle?

1:09:17 MA: No. I would like Michelle to because I didn't read the question. Sorry.

1:09:25 MB: So, if you have multiple HMIS implementations across the state, in theory, your HMIS implementations don't cross. So, you don't have the same shelter in both implementations. You shouldn't. So, the HMIS Lead will ask the recipient. It will ask the HMIS for the CSVs that are from your implementation. If you think they don't know where the line is that you guys break in implementations, you need to reach out to the state people and make sure that they know who's in what system. But once they know that, then they would send the correct CSV bundle requests to one and the correct CSV bundle request to another.

1:10:13 MB: Now, having said that, if you have one statewide implementation, meaning that everybody is in one server in one great big mass and your reporting is all being pulled apart by COC numbers or some other mechanism, and you have a state-wide implementation, even if you have HMIS leads all over the state to help you with user support, each one of those HMIS leads will not be sending in the reporting. You should be getting together and selecting the one person who has access to that main implementation server data to be able to pull the report for them. You do not need to send. We're trying to get you not to have to send the same thing over and over to different people.

1:11:10 MB: So, it's just what an implementation looks like in your state. And I know there are many states that are confused about what kind of implementation they have. Many HMIS leads I've seen that in the HMIS APR that you guys have submitted. So, if you really have a question about that and you want to put it into the AAQ desk, we're happy to help you with that. Either the Sage desk can help you or the HMIS desk can help you with that to figure out what you've got going there.

1:11:48 Mary: Okay. Did that clear it up, Brian?

1:11:56 Brian Roccapriore: I think so. I'll wait and see if there's a follow-up on it.

1:12:01 MA: Yeah. It sounds like it did. I see Wayne's question. I just want to say this about bundling again. Will a report submission be bundling by aggregate component type or by separate recipient and component types? Let me say this again. When we're talking about bundles in a system, let's say you've got a recipient that has funded four different agencies to provide rapid re-housing, so you have four different projects at four different agencies set up to operate a rapid re-housing project. When it comes time for your report, you're going to get that email from Sage. It's going to tell you, "Okay. Here's the four rapid re-housing projects that this recipient funded. Agency A, B, C, and D. This is who we need included in our report." You're going to go then to your HMIS and in whatever sort of configuration this works in your system, you're going to select all four of those projects and run one single report, one paper CSV for the specified date range that is inclusive of all four of those projects. You can verify that all four of those projects are included by looking at Q4. It's going to tell you which projects are included in that bundle in case there's any confusion.

1:13:28 MA: But you want to make sure that you're picking up all of the projects that are identified by the recipients into that one single report. And that one single report is so important because it's going to deduplicate those client records. So if a client was served at multiple projects they're only going to get counted once now, instead of four separate times. So it's really important to make sure that you're picking up all of those different projects. Hopefully, that is helpful. Bundling, we get a lot of questions, so I feel like we can say it lots of times, and hopefully it makes sense to people different ways.

1:14:22 Mary: Okay. What else? We have the time. Is there anything else we can kind of verbally expand upon?

1:14:34 FL: I got a few RHY questions. I'm directing you folks to the RHYMAservicedesk.net. That's the way to get these RHY statements best documented. So, submit your RHY questions to RHYMAservicedesk.net.

1:15:00 MA: I'm just going to keep talking. So Andrew submitted a question. A client that has served in a street outreach project and then is also served in a homelessness prevention project, I'll put in that's rapid re-housing project. They're a street outreach client who goes into rapid re-housing. Yes, that same client would be counted in each bundle. So that client... There will be some duplication here, right. We can't make this perfect. So that client will be counted in the outreach and in the rapid re-housing. But if a client goes to four different shelters during the report period, when those reports get aggregated together into that bundle, that claim is only going to show up one time. So we're not going to count them multiple times within that same component.

[pause]

1:16:19 Mary: I think that's about all I'm seeing here. Michelle, are there more you're seeing?

1:16:24 MB: I think we're good.

1:16:28 Mary: Okay. Who was the roundest knight at King Arthur's Table? Circumference.

1:16:40 MA: Oh, that's a good one, Mary.

[laughter]

1:16:44 MB: I like that.

1:16:44 MA: Michelle, Mary always tells a joke at the end of this Sys Admin call. This is your first time on a call for a while so...

1:16:49 Mary: And then I get really, really red, and we have to hang up real fast. So okay. Thanks everyone. Bye.

1:16:57 WS: Bye.

1:16:57 Mary: Keep the questions coming. We appreciate you and all your hard work.

1:17:04 WS: Thank you.

1:17:04 MA: Thanks everyone.