

HMIS Sys Admin Monthly Webinar

July 2020

e

0:00:01 Mary Schwartz: This is the HMIS Lead System Admin Monthly Webinar, delayed by a

week, but thank you for joining us. I'm going to watch our attendee numbers jump up a little bit more and we will get rolling here pretty soon. We are on a different platform this time. And so we'll do a little bit of housekeeping to begin. You're all going to be muted and we will be recording this. It is recording now, and we will share the slides at the... It'll probably takes us a couple of days just to get everything put together, but we'll post them on the hub. So let's talk a little bit about this new platform, WebEx, and how you get access to us to ask questions. So if you can't see it already, on your right-hand side of your screen should be a Q&A panel block, and it fills up the whole right side if you want it to.

0:01:12 MS: And you just want to make sure that you can type in your question, and where it says 'Ask' is you would select all panelists. So that'll head up to all of us, and we will answer your questions. That way we'll keep the answers coming throughout the presentation today. We've got a lot of stuff to cover, and our attendee numbers are nice and high. So I think we go ahead and get rolling. Again, welcome to the call. You all are muted, but you can ask us questions in the Q&A panel on the right-hand side of your screen. After the call, if any of the answers we give you are please enter an AAQ about that so we can spend a little more time on it, for whatever reason we don't get to your question while we're still live, you can always submit questions to the HMIS AAQ and we'd get answers out to you that way. Just make sure you select HMIS in the subject line.

0:02:15 MS: So to my fellow panelists, welcome. We have Fran Ledger from the SNAPS Office, we have Meredith Alspaugh from PCL, we have Brian Roccapriore from Cloudburst, and our tech support person in the background today, Tommy Joe from Abt Associates. I'm Mary Schwartz from Abt Associates as well, and we're going to get rolling. Like I said, we have a lot to cover. Fran's going to go over her usual HUD updates. We are going to have Brian walk through... We've got a little bit of feedback, I think, maybe Fran. So if you guys want to make sure to mute yourselves until it's your turn.

0:02:52 MS: So we have some new resources that have been posted that are going to hopefully help you as we continue to walk through the nuances of all the work going on right now in the fast-paced environment in which we live. So rapid expansion of HMIS, ESG and HMIS funding, data and equity. So Brian's going to go over those resources, and then Meredith and I are going to walk you through some of the technical updates that we have for you today, and we're going to end the call on going back over some of the frequently asked questions, I guess you'd say, from the past couple of webinars we've done regarding ESG-CV projects set up, and just anything that's come through the AAQ the last couple of months as we've been trying to roll all this information out for you. So with that, I am going to pass the ball to my friend, Fran, and she's going to get us going with HUD updates.

0:03:57 Fran Ledger: Excellent. Welcome everybody, and I'm glad you're here today. Thank you for all the hard work that you're doing. I am going to start off with some exciting LSA updates. I know that you probably have been wondering what's going on. I'm going to talk a little bit about what's happening with the system administrators, and then I will talk about how that impacts you. I don't have a lot of information; I wish I had more details to give you. So this is just a little hint of what's to come.

0:04:27 FL: We have been working with the vendors. So Abt Associates has been helping them understand the programming specifications for the LSA and so vendors have been working on that. The programming specs are complete, and if you are signed up for the hub, you saw those fill out, I

think, yesterday or the day before. The vendors have until mid-August to complete the programming, and then HDX 2.0 is going to open for testing. This is not open for the system administrators, this is open for vendors for testing, and that testing will happen between August and September.

0:05:02 FL: So the vendors will be testing their software to make sure that everything is working smoothly. And then around mid-September, so you're talking about the fall, the HDX will open up for CoCs. And we haven't put out a calendar yet to talk about when exactly it'll open up in the fall and when it'll close. We will put that out as soon as we can. We were hoping to release something before this call, but it may be towards the end of the week or early next week. We will issue a calendar that helps CoCs understand when the HDX will open up and the timeline for doing the submissions and when it'll close. So the previous LSA calendar that was out, those dates no longer apply. Again, there's going to be a new LSA calendar timeline, and you're looking for CoC data submissions to start happening somewhere around the fall, and more information is to come on that.

0:06:10 FL: I'm going to talk a little bit about what was discussed during the COVID office hours that happened last Friday. We've had a couple of new ESG documents that... This is ESG-CV documents that have been released, and Brian's going to talk more specifically about each of them, but I just want to highlight a couple of things that I talked about on the office hours. And one of them was to really underscore with ESG-CV recipients of the need to connect with HMIS Leads, and I'm doing the same here, is the need for HMIS Leads to connect with ESG-CV recipients early on to make sure that everybody understands data collection requirement, and also to be really clear about funding and how funding can be allocated to support that data collection. And Victim Service Providers and comparable databases are also included in that. And one of the documents that Brian will talk about can help figure out what that looks like, what actually gets covered.

0:07:12 FL: The other thing that's in there that we talked about is the additional burden that falls on HMIS Leads. And we talked about this a little bit before, but the HMIS Leads are the ones that will be doing the upload into Sage, and the upload will be done quarterly. There will be a cumulative report on the component time. More information will come out. If we have it, we'll provide that on the system admin call. So I encourage you to keep coming to these calls. And when we have more information available, we'll make sure that we give that to you as soon as we have it.

0:07:48 FL: I'm going to pass the baton over to Brian, and he's going to talk more specifically about the documents that are available and... Let me go ahead and do that.

[pause]

0:08:04 FL: And I think you have it, Brian.

0:08:07 Brian Roccapiore: I think I do, too. Thank you all for bearing with us as we all learn a new platform live and in real-time. So I'm going to go over some of the new documents in relation to the ESG funds that have come out. And Fran hit on the big points earlier that the underlying theme of all these documents is making sure that ESG recipients and HMIS Leads really need to start connecting on these things. The first document is rapid expansion of HMIS and things to consider. It covers the 10,000-foot concepts about what ESG recipients and HMIS Leads need to think about when they are rapidly expanding their HMIS. And as leads, you know that there's a lot of things to consider, and some of those are very nuanced to your own systems, but this really just

covers the high-level issues and includes a lot of lessons learned when HPRP was a thing.

0:09:00 BR: HPRP was like a \$1.5 billion influx of new funds, all of which needed to be recorded to HMIS, which resulted in a lot of new organizations, a lot of new projects, and a lot of new users coming into HMIS, and we really expect similar with the ESG-CV funds because of the size of the awards. Most region set of normal providers just aren't going to be able to handle an increase of that kind of capacity with the ESG-CV funds. So regions should start to think about working with their HMIS Leads to identify the scope of what those new additions are going to look like, because with those new additions comes new organizations and project setups in HMIS, new users coming into HMIS, which is going to increase the need for your trainings.

0:09:47 BR: It's certainly going to hit your help desk. New users and projects are always the big hit at the HMIS help desks. And HMIS, as you are aware, can be complicated to users who are not accustomed to it. So it also touches on the monitoring and reporting specifically because, as we've discussed on past calls, the reporting burden is going to shift a little bit, where previously in regular ESG, the subrecipients would run their own CAPERs and submit them into Sage, and then the recipient would ultimately finish the reporting.

0:10:23 BR: The way that it is going to work now is that the HMIS lead is going to run the reports from HMIS and upload them to Sage, and that's going to be per component. So previously, where the subrecipients would run their report, they can run their reports in theory, they look at them and say, "Okay, 20 people in my rapid re-housing project. That makes sense." Then they could upload theirs to Sage. Now, with the HMIS Leads taking that role, they can run those reports and Sage will accept those reports, but there's going to be a real need for monitoring in there because you might not necessarily know that the numbers that the report's giving you are accurate, because there could be projects that aren't entering data, projects that are entering data incorrectly, so the monitoring aspect of it is going to be really important. And as we all know, catching problems on the frontend will save you hours, if not days, on the backend.

0:11:16 BR: So the second document we have outlines what you can spend funds on for regular ESG funds. We have to go over this now because the ESG-CV notices, yeah, and there might be something different in there, but there really was no document out there about what you could spend funds on for ESG without having to comb through the Federal Register to figure that out. So all allowable expenses under ESG are going to be allowed under ESG-CV. And before I jump in and explain a little bit more of this document, it's worth mentioning that we're really recommending that the ESG-CV funds not be used for fixed regular expenses in HMIS because the funding is time limited and we don't want the funding to run out and have a community beyond the hook for additional expenses, and this funding just not be there.

0:12:08 BR: This document actually came about working with some states and there being some confusion about what was actually allowable under ESG. So it was a direct need from the coaches that are working with the states. And you can think about the ESG expenses in two categories: One for subrecipients that are not HMIS Leads and those that are HMIS Leads. In thinking about it from the non-HMIS Lead lens, on the screen right now, there's a list of things that you can spend your money on, things like hardware and software and personnel expenses for things like data entry and data monitoring. I already talked about why data monitoring is important. So really working that into your budgets. There's a piece on travel to HUD sponsored trainings, but that's probably not happening with CV funds being in the midst of a pandemic. So now, if the recipient happens to be

the HMIS Lead, there are some additional things that are allowable that are more nuts and bolts to the system, like hosting costs, backup and administration costs, which are all going to increase as a result of all of these new funds coming into your system.

0:13:15 BR: Note here that's important, is upgrading, customizing or enhancing your system. In this moment you can really think about that as the additional reporting needs that are going to come up, might arise because of COVID. If you need to tweak your prioritization tool, or your data quality monitoring reports, this is where you can think about using these funds to really enhance your system to meet the moment. And there are the issues of Victim Service Providers. And one quick note on that is that we can use these funds to establish and operate a comparable database but not develop one. So the difference is buying software off the shelf or designing it yourself.

0:13:56 BR: These funds are not designed to have a programmer come in and build your own system from the ground up. And touching on Victim Service Providers, with the amount of funding that's coming in, it is rational to expect that Victim Service Providers are going to be sub-grantees. Victim Service Providers are mandated to not use HMIS. What is a Victim Service Provider? That's a great question. Non-profit organization whose primary mission is to serve people experiencing domestic violence, dating violence, or sexual assault, or stalking. And if they take any money from FVPSA, the Family Violence Prevention and Services Act, the Office of Victims of Crime or the Office on Violence Against Women, for any administrative purposes in their organization, they are... Cannot touch HMIS.

0:14:46 BR: So what they need to do is use a comparable database. And comparable databases are not Excel spreadsheets, they are not Google Docs, what they are are relational databases that meet all of the HUD data standards and produces all required reporting. And I forgot at the beginning of what I was supposed to say, which is all of the links in this presentation do not work in WebEx, and they will in fact work in the slides in a couple of days. So for those of you furiously clicking on the screen, I apologize.

0:15:17 BR: But what's important here is that Victim Service Providers are most likely in some communities going to be ESG-CV grantees, and there are going to be some that do not have a comparable database already. And traditionally, Victim Service Providers are not database experts, so if there is a new VSP in your region who's coming in to be an ESG Sub, connecting with the HMIS Lead as the database experts, and helping them through that selection process is not a requirement, it would be a great service for everybody to connect, to be on the same page, because you as HMIS Leads understand the reporting needs of ESG grantees, and you are going to be the ones that can help walk them through that process.

0:15:57 BR: If there is a question if you should be using a comparable database or not, the link on the screen right now is taking you to the decision tree where it walks step-by-step to figure out if you should be entering data into HMIS or if you should be entering it into a comparable database. And the last document I'm going to touch on really quick is data inequity using the data you have. There's a lot of focus right now, as there should be, about ensuring that our systems are equitable, and a lot of the work that I've been involved in gets real complicated really quick. And for communities that don't have designated data analysts on staff or have a one-person HMIS show, it almost immediately jumps to the point of the data analysis being impossible.

0:16:43 BR: So this is the first of maybe, I think, four data inequity documents that are going to

come out that starts really at the ground level and uses information that's available in the off the shelf version of HMIS, so something that is standard that everybody has. So community can start thinking about equity, and with the data that they already have. Really getting to know their systems, who they're serving, who's in their systems and how to use that data actionably, they give some examples of what other communities are doing. So it's a great starting place for those who are looking to take that first step in centering equity in all of their data work, and there's going to be more to come with some real world, more concrete examples that take that next step outside of the standard reports that you all have in your HMIS. And with that, I'm going to toss the ball over to Meredith who is going to walk us through some technical updates.

0:17:42 Meredith Alspaugh: Thanks, Brian. Okay. There we go. I'm going to change gears here just a tiny bit and not talk about ESG-CV for a minute. I want to talk a little bit about APR submissions and HMIS project setup. So we have seen, HUD has asked about why we're seeing so many CSVs uploaded for single projects sometimes. So like a permanent supportive housing APR having multiple CSVs attached to it. And it got us digging in a little bit deeper and maybe realizing that some folks have missed that part of the instructions in the Sage guidebook that say that when a single grant recipient has multiple sub-recipients, that the data should be aggregated in HMIS before uploading it to Sage.

0:18:41 MA: So in other words, if there is a recipient that has multiple sub-recipients that are all working on the same grant, like there's a PSH, and you have a couple of sub-recipients, if there are multiple projects set up in the HMIS, when generating the APR, each of those... The CSV-APR report should be aggregated across all three of those projects. Now, HUD recognizes there may be times where a Victim Service Provider is a sub-recipient and they're not in HMIS. So you would have a separate CSV upload for the Victim Service Provider project that makes sense.

0:19:18 MA: But in general, as indicated in the guidebook, really, those CSV should be an aggregate of all of the different sub-recipients that have projects set up in HMIS. If the sub-recipients... Or if the recipient can't do it themselves, can't directly aggregate this data in HMIS, they may be reaching out to you as the sys admins or as HMIS Leads for assistance. So we just wanted to call that out, raise it, elevate it as a potential issue and something that has been noticed. And to the extent possible, when submitting APRs with multiple subs, to aggregate in HMIS a single upload.

0:20:01 MA: I want to talk really quickly too about the project setup tool. The HMIS project setup tool has been updated and reposted on the HUD Exchange. We made a couple of updates in there to account for ESG-CV and HOPWA-CV funding with regards to project setup. So hopefully, it's fairly straightforward to you all that have used the project setup tool before. We're going to talk a little bit more about project setup for ESG-CV here in a few minutes, because that has been a commonly asked question that we're getting through the AAQ. So we just want to make sure we're super clear about project setup for ESG-CV and HOPWA-CV.

[pause]

0:20:46 MA: Mary, I'm trying to move you. Hold on, sorry.

0:20:51 MS: It's okay, I can talk while you're doing that. Okay. So we want to talk about a few more things, and then we will spend lots of time on questions. You guys have some great questions,

and it's also... Because of this different platform, it's a little different Q&A environment for us as panelists. So definitely bear with us.

0:21:10 MS: Okay, I want to talk about RHY upload dates. So RHY didn't do a spring upload like normal, we just want you, HMIS Leads, to be aware that your RHY grantees should be collecting data according to all the data standards and your HMISs, and they should be able to create CSV exports, and there will be a vendor testing period as there always is, coming up here pretty soon. And the data submission period, there'll be two different data submission periods depending on when RHY grantees' grants are ending.

0:21:47 MS: This is all being communicated to the vendors and the RHY grantees. We just wanted to make sure HMIS Leads have a heads-up as well. There are currently trainings going on for RHY grantees and the federal project officers. This month and next month, both continue. The submission periods will open, and that is when RHY grantees need to be able to submit their HMIS data, and it'll be a full-year's worth of data for these submissions instead of six months' worth of data like it has been in years past. It'll go back to a twice a year upload in years to come, but this system is new this year, so it's just the one upload. So if you start getting tickets locally from RHY grantees to help you... Have you help them do data quality on their files or create uploads or any of that, this is a heads-up that those time periods are happening.

0:22:52 MS: Next slide is... Oh, okay... And again, the links don't work. Sorry about that. We will get this PowerPoint out as soon as we can so you can go through and click on all these links we're talking about. But we did post some updated project transfer guidance. We just made some, I don't know, clarity fixes. It doesn't really change from what we've talked about before, and the last time we talked about project transfer guidance was on the March call, I believe.

0:23:22 MS: We kind of just identified it, categorized that there are client record transfers that could occur, there are whole projects could transfer. The administrative ways to handle project transfers is we're trying to get a lot more complete in our guidance around data quality considerations. You need to make that inventory consideration, each of these have impact on bed inventory records, and then of course, the recording implications of each method. And it's more... There's no more preference or HUD's preference or order of priority or anything like that. It's more about, "Here's all the information you need to have as HMIS Leads and system administrators to think about the impact of each of the different kinds of methods that you could employ for moving records from one project to... Client records from one project to another, or project records from one organization to another, or for whatever reason you might be considering these kinds of administrative changes."

0:24:28 MS: And this all started with... There're grant consolidations going on for CoC grants. So it's like... I would say, Brian, that the most asked question on the HMIS AAQ is, "What do we need to do with this project that's ending or this record that needs to be moved from one project to another, etcetera, etcetera?" So the guidance that you'll be able to click on soon when you get this PowerPoint deck, and is already posted on the HUD Exchange, so you could do a Google search for it there if you wanted, it's just lots of information for you as HMIS Leads to consider as you think about transfers.

0:25:10 MS: Okay. So we went through all that really quick, and we have a lot of time to spend on just all the different variations of questions that we have been getting, and to have some discussion

with you guys about these questions. So I guess it's an all hands on deck, Brian, Meredith, Fran and I...

0:25:34 MA: Hey Mary. Before we get into those, can we just back up to a different question that came in about the RHY uploads?

0:25:41 MS: Mm-hmm.

0:25:46 MA: There was this question that... It's funny that this is a great question, for grants ending in September, the reporting period is September 7th through the 25th. Was that intentional or a typo?

0:25:56 MS: It's not a typo, and it's something that we too kind of went, "Huh?" But I think the main message for RHY grantees to get is if their grants are ending, and technically they end September 30th, 2020, that because the upload period is from the 7th to the 25th, they'd actually need to spend those last five days of the month doing more of the administrative close-out stuff and need to get all their client data in between the 7th and 25th. So essentially, the client service part of a RHY grant that ends September 30th, technically, really the client data collection and serving and getting all that you need in HMIS ends by September 25th or 24th, so you can get files in on time.

0:26:46 MS: RHY Program Office deliberately set those dates up that way because they don't want to demand that RHY grantees upload data past September 30th, the date that the grant is done for them entirely. So it's basically like RHY grantees need to manage the client service and data responsibilities with the overarching grant administration and management responsibilities, and make sure that they have enough time up to the end of September to both get all the client data in that they are supposed to on the clients that were served, and do any additional close-out activities on the grant itself. And the RHY program office can answer more of those detailed kind of "Huh? Why?" questions. So these are the dates that they established for their grantees. Does that help? Okay, answered.

0:27:57 MS: It's hard to make sense of it, but it's deliberate, the dates you see there. Okay, what else is bubbling up for folks. So here's some of the general questions that we have been asked recently. So Brian, here, we'll do it this way, we'll pretend like I'm actually, that I'm asking you these questions. So Brian, do I need separate project setups in HMIS for round one and round two ESG-CV allocation?

0:28:36 BR: No, you do not, Mary. Thank you for your question.

0:28:41 MS: Okay. [laughter] So...

0:28:43 MA: Can I add to that answer?

0:28:43 MS: Yeah, please do.

0:28:46 BR: Yeah, I was just going to say, so long as it is funding the same project in the same... You can't fund an emergency shelter round one, and a Rapid Re-housing project in round two and expect that to be the same project setup in HMIS, but if it is like the same emergency shelter that's being funded in round one and round two, that is perfectly fine to be set up as a single project in

HMIS. Meredith, what were you going to say?

0:29:11 MA: Oh, I was just going to note on here that this isn't necessarily ESG-CV specific, but certainly applicable. We've seen a few times where communities sys admins, HMIS Leads are setting up a new project in HMIS every time that project is renewed for funding with ESG. So let's say there's a prevention project funded in 2019, they are renewed in 2020. In many cases, folks are going back in and setting up a brand new project in HMIS for that 2020 funding. That's not necessary, and really shouldn't be happening. We should have the same project for the duration. So similarly in ESG-CV, there's not going to be a need to set up a prevention project now and then close it and set up a new one next year. So that's not a thing that should be happening, but unfortunately we see it is happening, so I just wanted to call that out, too.

0:30:26 MS: So do I have to have separate project setups for different jurisdictions of ESG? Well, this is something that I've struggled with, too. So I did this chart. Different jurisdictions funding both my ESG normal grant and my ESG-CV grant, and how according to project type, how many different projects I would need to setup depending on the jurisdiction and whether it's ESG-CV or ESG normal. So I'll leave that on the screen for a second to let people stare at. I think the starkness is in like if you have Rapid Re-housing projects, you need a different project setup for both your normal and CV ESG funding, and the different jurisdictions that are funding the RHY projects. But that's not the case for ESG... Sorry, ES projects.

0:31:37 MS: And also, back to the very first question that I posed to Brian, do your first and second allocations of ESG-CV feed their own? No, the first and second allocations of ESG-CV are a single column, either state ESG-CV or city ESG-CV. Or whatever jurisdiction. I guess there's county, and whatever. State and city are two kind of jurisdiction examples. Of course, it could come from any number of jurisdictions.

0:32:15 MA: Yeah. So to Aaron's question that you just submitted a second ago. Yeah, imagine there's a... Oh, I didn't expect that. A one and a two. I got the biggest and fattest note there ever. But yeah, so these are the same things. Like Mary just said, one and two are the same things here.

0:32:41 MS: And gosh, the Q&A box is... It's hard to follow what's been answered and what hasn't for me, but... So definitely Brian and Meredith and Fran, if you want to just start verbally addressing some things. I don't know if any questions are coming out from this slide.

0:33:03 BR: None that I see for this slide, we did get the question of, is there an estimated timeline for the release of the ESG-CV notice? And I'll throw that to Fran, but the answer is no. I don't know if Fran wants to expand on that any more than my one word answer.

0:33:21 FL: That would be my answer. Yeah. We don't have a definitive answer at this point. We still don't know. But we're trying to get that out, and that's a continued internal effort, and we hope to get it out as soon as possible.

0:33:46 MA: Can I expand on the question that Wayne asked about will the first submission just be the single three month quarterly submission? Not necessarily. And we can't really say a lot about that until the reporting guidance is finished and the notice is finished, because there's a lot of question about dates and when things start and whatnot. So not trying to be dismissive of that question, it's a great question. Just more to come on that as the guidance is released.

0:34:21 MS: Okay. You already addressed Aaron's question. So Lilian's asking, do we need to group each component to upload? And yes, Lilian. That is the idea, that... And this is different, and we've gone over this one a couple of the past webinars, is really what our focus on May's and June's webinars were. So if you need to go back and refer to those slide decks and recordings, but yeah, grouping by project type, which loosely aligns to component, is the goal here. And then it's a question of whether it's across the jurisdictions and across the CV or normal fund sources versus not. That's what this matrix is trying to describe for you. It's not perfect answer.

0:35:18 MA: Yeah. Let's maybe try to walk through it in a little more detail. So yeah, in this scenario, this is Mary's single... This is Mary's CoC that Mary Schwartz Inc is the only project... Or organization operating in, but she is receiving funding for a street outreach project from... Or she's receiving funding from street outreach from state normal funding and state ESG-CV funding. Per the rules of the ESG-CV, you can mix those two types of funding together in a single project as long as it's from the same jurisdiction.

0:35:58 MA: So the state ESG and the state ESG-CV funding can be combined in a street outreach project. One project in the HMIS. Now, let's say the city has ESG normal and ESG-CV funding, and they want to put it towards street outreach also. You cannot mix those two funding sources in a single project in HMIS. You cannot mix the city funding with the state funding. However, you can mix the city's normal ESG and their ESG-CV together in a single project.

0:36:35 MA: So what that first row is telling you that for street outreach in your community, you've got two projects setup. One that's state funded, one that's city funded. And then if you move down to the shelter, shelter doesn't have the same rules. Shelter is allowed to mix funding both between jurisdictions and between types, for lack of a better word. So between CV and non-CV funding. So in this scenario, in this community, if the state is giving their ESG normal and their ESG-CV and the city is giving ESG normal and ESG-CV to the men's shelter, let's call it the men's shelter in town, they don't have to set up multiple projects for each of those funding types. They have one shelter project in their HMIS.

0:37:26 MA: When we talk then about temporary emergency shelter, with our definition to be determined in the notice, those projects cannot be co-mingled with other shelter projects, nor can they be co-mingled with different jurisdictions. So if there is state funding, state ESG-CV funding for a temporary shelter in your community, it would be set up as a single project in HMIS. If the city also wants to pay for a temporary shelter, a second project would have to be set up in HMIS for that funding. And then when we move into Rapid Re-housing and Homelessness Prevention, I'm going to talk about them together because they are treated exactly the same. There must be a new project set up in HMIS for each jurisdiction and each funding type. So if you have in your community Rapid Re-housing that is receiving funding from the state normal ESG, and now the state's going to turn around and give more money out of the ESG-CV, that's great. But they're two separate projects in HMIS.

0:38:35 MA: Similarly for the city. You've got city ESG regular, city ESG-CV, two separate projects in your HMIS. And it's going to be the same for prevention. And I know the next question is going to be, "But how do we tell the difference between the clients?" Because we get that question a lot also. And HUD has said, and it's in the manual, and it has been said on different webinars and different FAQ documents going back to like eCart days, for those of you that

remember the eCart.

0:39:04 MA: HUD encourages that a participant gets 100% of their needs met by a single funding source, and that a client isn't going from having their June rent paid for by the State ESG money, and then their July rent paid for by the city ESG funding, and then their August paid for by the ESG-CV funding. There's going to need to be some thoughtfulness in how you're allocating your funds to projects at the local level, so that you're serving 100% of that client's needs with a single funding source. And you're setting up individual projects for each of those funding sources in your HMIS, so when it comes time to do the reporting, you are not counting those clients multiple times in multiple projects.

0:39:51 MA: Because if someone is being assisted by city, state, and county ESG, they would need to be reported three times, but then you would be over counting the people that you're serving. That's not an accurate reflection of how many people were assisted. And again, this is all documented in the ESG HMIS guidebook. I would encourage you to look at that. If you have questions about it, you can submit an AAQ, but there should be a single project for each jurisdiction and each funding source. Does that help? Does that detailed walk-through cause more questions or help?

0:40:28 MS: Yeah. Good job going through my chart, Meredith. Thanks. [laughter] That's great. People are asking good questions. And they should be. It's a lot to understand. The ESG manual should answer most of these questions that are coming in. Just still trying to read through what's being asked.

0:41:01 MA: And the tool does try. It should take into account all of these. So, when you're going through the project setup tool, and you're selecting ESG-CV Rapid Re-housing. And you try to pick ESG Rapid Re-housing, you will get an alert that you can't mix those two funders together. If you pick ESG street outreach and ESG-CV street outreach, you'll get a warning that you can only combine those fundings in a single project if it's the same funding jurisdiction.

0:41:35 MS: Somebody's asking kind of a philosophical why is CV funded project set up different than normal ESG? Do you want to speak a little bit to the why, Meredith? Just the argument is that separate projects set up based on jurisdiction seems to go against encouraging communities to do coordinated investment planning. But I think you and I have talked about this before. It's like each funder needs to know what that funder did.

0:42:02 MA: Yeah. And it's really not different. If you read the ESG manual for Prevention and Rapid Re-Housing, the expectation is that you're only reporting on those served by that particular funding source. And I think up until even this last year, we were very explicit in setting up separate projects for those different funding sources from those different jurisdictions. I think there are some communities that have asked to be able to combine projects that they could somehow do the reporting so that they were only reporting individual clients to their specific funder. That actually hasn't worked out super well.

0:42:42 MA: And so, the simplest and cleanest way, simplest on one hand, maybe not simplest for everything, but to do that, is to set up separate projects. So we try to be consistent actually with the project setup guidance and ESG. So there shouldn't be too many variations, really. The temporary shelter being a significant change where you can't co-mingle funding. But yeah, for Rapid Re-

housing and Prevention, that's really the same principle that's been in place for a long time.

0:43:20 MS: We haven't gone into CoC, multi-CoCs within a state for state ESG funding purposes, multi, multiple CoCs. There's a coordination that's needing to occur, especially... I want to get this straight. Sorry, go Meredith.

0:43:45 MA: Okay. So you're right. There has to be a lot of coordination at the state level. We'll be working with HUD on doing some targeted state trainings also, because we know that the states are going to be a little more complex than smaller local jurisdiction. But the expectation is that the reporting for ESG-CV is... I'm going to make sure I say this right, is generated by the HMIS implementation also. So if you are a state with a multi-CoC HMIS implementation, the HMIS Leads and sys admins will need to coordinate together to make sure that that information is being sent to the state in a coordinated fashion, so that one entity is submitting it to the state, not lots of different entities.

0:44:37 MA: If you are not in that situation, if you are a state, let's say you've got just five CoCs in your state, non-entitlement funding that the state allocates to those five different CoCs for different purposes, then the state will need to work with those five different HMIS Leads to get the data back from them for their CSV CAPER. So they will be work... Or CV CAPER. They will be working with all five of those different jurisdictions.

[pause]

0:45:30 MS: That's such a hard thing to write down in words. There's so much nuance to this.
[chuckle]

0:45:35 MA: And I think that's a really good point, that there's a lot of training yet to happen. Like this is not the end all of the training that folks are... We're not even scratching the surface of training that folks are going to get on this topic. So there will be trainings, again, like I said, at the state level, at the local jurisdiction, so city or county levels, the territories. There will be recipient trainings, there will be guidance that is written that is built into Sage. There's going to be a lot of different areas for information to be shared about how this all is going to work.

0:46:14 MS: Somebody just wanted a little clarity around state versus city, and these are just the different funding jurisdictions that money for ESG could flow through. There're allocations for ESG, it's not a competition. Allocations are given to different jurisdictions. So state and city are shorthand words for the entities that initially receive the allocations. Is there a better way to say that, Meredith?

0:46:46 MA: No, I think that made sense to me.

[pause]

0:46:57 MA: So there's a question about, "Can an agency have two open entries for the same client for RRH and ESG, and ESG-CV?" And so I think that's to the point I was trying to make earlier. The client should be enrolled in a single project. They should not be enrolled in multiple projects. And that's where HUD is really encouraging communities to work together and think about how they're allocating their funding so that you've got 100% of that client's needs being served or met in

a single project as opposed to partial here and partial there.

0:47:37 MS: Thanks, Tommy Joe. He just shared how to get an unanswered set of questions. I've been having a really hard time sorting through. [laughter]

0:47:44 MA: I know. It does not work for me though.

[overlapping conversation]

0:47:56 MS: Okay, and some of these unanswered questions are going to need to... I've also hit against a character limit in the answer box. Oh, it says it right there, 256 character limit. So some of these just need a longer answer and we'll have to have you put them into the AAQ for that.

0:48:20 MA: So I see another question here from Jesus that says, "On the setup side for ESG-CV, what will define if the project is ES or RRH?" That's going to be determined by the recipient and what kind of projects they're funding, whether they're funding emergency shelter or Rapid Re-housing.

[pause]

0:49:06 MS: "Can the state ESG require a separate project that is also funded by city if they want to even though they don't have to?" Could you choose, I think, Abby, you're asking, Could you choose to, for example, break up your ES into multiple projects in HMIS if you wanted to? And you can always do that. Yes. Yeah, we're doing bare minimum requirements, I guess, is the way to think about it. You could always go... You can't not do what is required, but you can do something that is not... I'm not going to try and say it right. Yes, the answer to your question.

[pause]

0:50:05 MA: Sorry, guys. It's hard to connect some of these questions.

[laughter]

0:50:10 MA: I'm kind of all over the place.

0:50:13 MS: We've all gotten really comfortable with our own silences on these calls. "Does the HUD project setup tool help determine what is shown on this slide?" Yes. Like Meredith was saying, you have a chance on the HMIS project setup tool to enter the different funding sources, and that will tell you whether you can have them in the same project or not.

[pause]

0:50:57 MA: So, Jennifer, your question that, "Participants can be in shelter and RRH at the same time?" That's right, and I didn't mean to say that wasn't the case. There could certainly be multiple projects where a client is in a shelter and they are in the pre-housing phase of Rapid Re-housing before they're moving into that project. I'm not sure exactly what that was tying back to. I think I was saying something about being into Rapid Re-housing projects at the same time, that there wouldn't be a person in two Rapid Re-housing projects at the same time, but they could be in shelter

or street outreach and Rapid Re-housing while they're moving into housing.

0:51:49 MS: This is a good one, Denise. So ESG-CV funding is reported quarterly, we know that's going to be true, but notice isn't out and we don't know when the notice will be out. That's all going to be in the notice. And you're clarifying, "Is normal ESG or traditional ESG, is that going to go to quarterly too or stay on the annual?" And that's going to stay on the annual. Normal, traditional ESG reporting stays as is. It's the ESG-CV only that's becoming quarterly, or that is going to be.

[pause]

0:52:33 MS: Michael wanted us to return to... So I think that's fine. We can always come back to that chart, but some of these other frequently asked questions. So, "Do I still have to do coordinated entry in HMIS by October 1?" Yes, if you're... If you got a CoC-funded CE-SSO project, that data collection starts October 1.

0:53:05 MS: "Do I have to do a new project inventory record?" Meredith addressed this already in terms of... We have seen examples of people doing new projects every time their funding is renewed. You don't have to do that. And then we came across one where somebody was doing a new inventory record for the same beds every time they had to report on the HIC, and you don't have to do anything like that either. If your beds stay the same from year to year on your inventory, you only have to record changes, additions, deletions, changes to your bed inventory in HMIS as they occur, not... You don't have to arbitrarily do a new inventory record every year for the HIC or anything like that.

0:54:00 MS: "Do I have to do a new project if my shelter expands to hotel/motel?" This is one of those answers that takes more words than... More letters than 256. But what we said in terms of COVID, if your question is, "Well, we've taken our 10-bed shelter and we've moved five of those beds over to the hotel because that's the only way we could get the social distancing we need, but we're not really using the hotel vouchers, etcetera, it's just an extension of our facility." You probably don't need to change really anything. Once COVID goes away and the beds come back to your shelter, it's like you always had 10 beds throughout that time, you just moved them around by location to ensure distancing could occur. That's one answer that would... That's one question that we'd probably say, "No, you probably don't need to do anything really in HMIS to account for that."

0:55:03 MS: But if you're going to add to your facility shelter bed inventory with hotel/motel vouchers, those are two different types of beds, and that would, according to the manual, create different inventory records for you. So yes, in that case. So keep asking the questions on the AAQ, and the more detail you can provide, the better. And we also will point you to the guidance, particularly if it's about how you've been managing your COVID-related inventory changes locally. We have some very specific guidance and a lot of it starts with, "Do what's feasible. It shouldn't be taking all your time to manage your inventory in HMIS." We obviously need to focus on doing the other good hard work that we're doing. But there are some examples in the guidance that we've come up with and we can help you get to the right answer. Yes, Meredith?

0:56:13 MA: No, I'm sorry. I got excited. I wanted to change the subject about LSA for a second.

0:56:18 MS: Do. Do, do. Okay. [chuckle]

0:56:20 MA: But if you weren't done with that, I can wait patiently for you to finish.

[chuckle]

0:56:24 MS: No, no. Reading your face is giving me a way to stop talking. Go for it. [chuckle]

0:56:29 MA: So Maryanne asked a question or made a comment that it would have been helpful to know that the LSA report was changing and that's not available in their systems. They were planning to use it for Stella and analysis, so I just want to speak to that a little bit. Vendors, I believe, were told to keep the old version of the report available because the old version of the report works in HDX 2.0 and Stella. So you should be able to pull last year's version and use that data, or even if you can't pull it, you should have last year's files that can be uploaded into Stella for analysis. Mary, does that sound right to you? Do you remember that?

0:57:17 MS: Oh, I'm sorry, I was reading and not listening.

0:57:20 MA: Say no, but we had talked with the vendors, and I believe even with this group, several months ago, about the fact that the data standards changes made it where the LSA didn't work from the systems anymore, now that I'm saying this out loud. Do you remember this last fall? But they were supposed to still be able to have access to last year's files that were submitted so that they could use that data in Stella. So it is correct that we can't do any current data uploads into HDX 2.0 because of the data standards changes that happened last year, but you could use last year's submission in Stella for analysis. So I just wanted to flag that so that... It's maybe not ideal but it is data that you do have available to you that could be used also.

0:58:15 MS: And we've had a few questions around, "When is Stella going to be updated to catch up?" And of course, that's part of the project timeline. As the data standards, LSA... First data standard changes get implemented and LSA specs get written, and then the reporting specifications for any upload process, and the ability to take in all the new data that's going to be reported soon, it'll be accommodated in Stella, but it's like they can't happen simultaneously. We've got to get the specs out to the vendors so they can update the LSA file exports, and then Stella needs to be able to take those new exports in when it's time.

0:59:05 MA: So there's a question here from Nate. "If HMIS Leads are responsible for the CV quarterly reporting, are the ESG recipients also responsible for any type of CV reporting?" So ultimately, the ESG recipient is the only one responsible for the reporting. They are the ones that must submit the report to HUD. So they have a series of questions and descriptions of how they are spending their money as ESG recipients that they are providing to HUD. The HMIS Leads are only responsible for providing the ESG recipients with that HMIS data.

[pause]

0:59:57 MS: There's so many good questions here. Should we just keep going? Yeah? Okay. We have the next 30 minutes blocked out still, I think, for this call, but we are at the top of the hour. We don't have any more content for you, but I think we're going to keep going through your great questions that are being addressed here. Fran or Brian, do you see anything in particular?

1:00:27 BR: There's a couple that are touching on, when you are enrolling someone from one

Rapid Re-housing project to another Rapid Re-housing project, what that looks like in the system, because it would look like they weren't eligible to be in the second Rapid Re-housing project. So, the stock answer that you would get if you submitted that to the AAQ is that there's a couple instances in HMIS where the data collection doesn't necessarily align with eligibility. And if that is the case, when someone is entering from a rental with a subsidy into a Rapid Re-housing project, in HMIS it would not look like they were literally homeless when they were coming in, but you should still enter that. And if they were in a rental with a subsidy, then just explain that in the reports that ultimately get run. And all eligibility should be kept on file with the project, so there should be nothing stopping somebody from the secondary enrolment in the Rapid Re-housing projects so long as you're keeping track of that.

1:01:31 MS: And Meredith, do you want to add anything to that about... If you're reporting on an APR, and things quite show up as ineligible on your APR because they haven't prior living situation of permanent housing, and that's like for only homeless people program. If that causes flags, there's this form called additional info in Sage to submit that goes along with that as part of the instructions in the guidebook.

1:02:02 MA: I didn't even have to say anything, you nailed it.

1:02:05 MS: Oh, yeah.

[laughter]

1:02:10 MA: In general, that additional comments field in the APR is super helpful. So if you've got folks that are filling out APRs, strongly encourage to add additional comments in there so that the field office reviewers have that information. Daniel, there are no data standards changes planned at this time for October 1st, 2020, except for the implementation of coordinated entry data.

1:02:46 MA: I see a bunch of scenarios in here that are like, "What if the city does this and the county does that, and this one does this, and this one does that?" Those are really hard to answer, I'm just going to be honest, in the abstract or hypothetical. If you have those kinds of questions and can give us the detail around that and would submit those in the AAQ, that makes it a lot easier for us to process and think through how those would actually play out in project set up. So if once you've looked at the set up tool, you read the ESG guidance, you still have questions about how those projects should be set up, please submit an AAQ so that we can really dig into those and make sure that we get to a good response on those.

1:03:41 MS: Yeah, and some of these like these many CoCs in our state and whether it's a single... In general, what Meredith said is true, we'll expect the coordination across the implementation to happen at the HMIS lead level so that they're single submissions. But just like you just said, Meredith, some of these... But it's this many in this state and this breakdown, and it's really hard to answer those without... And sometimes we have to ask you more questions even when it comes in on the AAQ, but that's the great place for those kinds of specifics and specific examples to land for us. Okay. Just trying to...

[pause]

1:05:09 MS: What if an agency that is new to our CoC received SO funding through ESG-CV? Can

they join our already existing city ESG project, or should they be separate through CV existing? So, CV and existing can go together according to this chart. It's not a perfect [chuckle] representation, but I think that covers the example that you're throwing out there, Marianne. You can add ESG-CV funding to existing, normal ESG funded projects, but that within that same jurisdiction, within that same project type.

1:05:58 MA: I think the thing to keep in mind...

1:06:04 MS: In the case of our RRH and HP.

[chuckle]

1:06:08 MA: Yeah, I'm trying to think of how that functionally, at the ground works. Because the ESG recipient is going to give the funding to a sub-recipient. So, City of Cincinnati is going to give their money to Bethany House for emergency shelter. The expectation is that Bethany House has an emergency shelter set up in the HMIS because then the City of Cincinnati is going to turn around at reporting time and say, "Hey, HMIS Lead, we need Bethany House's CSV or whatever because we gave them money." Okay, great.

1:06:43 MA: So, the recipient is giving them money to sub. So, I'm struggling with that scenario. You've got a new agency coming in, and you're asking if they can go into an existing project. Why wouldn't they have their own project, I guess, is what... And I know this is hard to answer when you can't talk, but maybe Mary, do you understand my question? I would think that that agency would have a project set up in the HMIS, that that agency was funded for emergency shelter. So, I'm not understanding why they would use another agency's shelter projects.

1:07:20 MS: Funds for it.

1:07:21 MA: Yeah.

[overlapping conversation]

1:07:29 MA: I would say it's the same for street outreach though, too. If this agency is funded for street outreach, that agency is funded for street outreach, but I think this might also be an example of... This one's a tough one to sort of talk through in a one-directional conversation.

1:07:49 MS: Yeah, I thought it was straightforward because of my awesome chart, but it's not. But I see what you're saying. Why would you... Why would you come in and do a second outreach program if you already have one going? Why wouldn't you just add to the outreach program that already exists? Is that your question, Meredith?

1:08:09 MA: That's Marianne's question, I think, but I think my question is the opposite. If Agency A is funded for street outreach and Agency B is funded for street outreach, they would be two separate street outreach projects in the system. But I think she's saying...

1:08:26 MS: They would be. You're right.

1:08:27 MA: She's saying Agency A has the street outreach. Now, we're going to fund Agency B.

Can we just put them into Agency A? No, I don't know why you would, I guess, is my question there.

1:08:42 MS: Yeah, this all assumed... This chart assumed single agency basically. It's that simplest and probably maybe doesn't even exist example of, "I'm the only agency in town. I get all of the money for all the services, and I just need to figure out how to divide that into my single agency HMIS and across how many different projects I'm going to need if that's the case." When we go out beyond the boundaries of organization... Aye, yai, yai. You guys, it's hard. [chuckle] We're sorry.

1:09:26 MA: Great question.

1:09:27 MS: And thanks for our patience. And you're all so smart and all... The cool thing is you're thinking of the right things to ask. Especially because we're not just like, "Oh this is easy. Piece of cake." It's not easy. It's not a piece of cake. What you're doing is hard. We want to help get you the guidance that you need to go forward in the right ways. A lot of this is really hard just because there is no notice yet. And some of this we can't say for sure. We're trying to give you kind of our best thinking around this from a HMIS perspective.

1:10:03 MA: And I know it's frustrating, but there is actual better guidance coming also. There will be training. There will be written materials. We will have time where we can actually dig into some of these details once we have a notice and have more information. So, I want to just echo Mary's sentiment that we appreciate your patience. And thank you for asking these questions. And hope that we can give you the best information that we have right now. It is a challenge.

1:10:36 MS: So somebody's asking if there are any updates to timelines for LSA or ESG-CV. So we don't know when then the... Just to kind of recap what we said in the beginning, or Brian said in the beginning, we don't have any notice yet. The ESG-CV notice is not out, don't know when it will be, and unless they... There are some updates, but nothing is... There aren't specific dates yet for LSA submissions, but the vendors have the programming specs, and we expect vendor testing in HDX to happen. And this is all happening kind of fall-ish.

1:11:12 BR: Mary, I think you touched on this before, but can you talk really quick about what would happen if a state ESG recipient funded multiple projects in different HMIS implementations, how that upload of CSV files would work?

1:11:29 MS: I mean, think I also asked a lot of folks who were asking details around that to put an AAQ so we can be thoughtful with those answers. But generally speaking, if it's a state ESG jurisdiction... Actually, I just want to... There is so much nuance there, we will expect that there's some coordination if there's multiple CoCs within the single states that are using the same HMIS implementation will expect that there's some coordination across those CoCs, so that like un-duplicated counts of RRH or whatever the project type is. I mean, obviously, all the different components that are funded get their own upload, so it's not like the one upload to one submission to the state from all the different... But within the components that you're in within the single jurisdiction and running a report across multiple CoCs, we would hope that the HMIS Leads kind of coordinate, "Okay, I'm going to run it this quarter, and it's going to be for all of your guys' CoCs too."

1:12:44 MS: And that goes to the state. And the next quarter, HMIS Lead number two says, "Okay,

I'm going to run it this quarter." It's like this is an assumption that you all have. Permission to run each other's uploads and that you all have the ability and that you know that the client data is going to be correct and un-duplicated, but if you can do that kind of coordination and un-duplication at your level, then HUD has even better data. There's a lot in the past slides. Go Meredith, I can see you want to get...

1:13:16 MA: That's in the context of the implementation for the HMIS, assuming there's a statewide implementation, I think, is what Mary is really referring to. When there are not state-wide implementations, when they're single CoC implementations, that's not going to work. So each of those CoCs would be required to provide the state with the CSV bundles for the funding that that state gave that particular CoC. So I just wanted to add that caveat in there, too.

1:13:47 MS: Totally. Implementation meaning coordinated data entry into a single database like kind of implementation, software provider, all that. Have the questions slowed down some, Brian, or do we... I'm still getting lost in this user interface. We're going back to Adobe Connect next month, so we won't be as confused with questions as we are this month next time round.

1:14:26 BR: So we had 114 questions come in so far, and I think we've gotten to a lot of them, but the ones we didn't, just please submit those to the AAQ desk, so we'll be able to get you a thorough answer for your questions. The trickle of questions has slowed down, there's just a couple left here. Matt says he appreciate us making sense of all the upcoming changes. As much as possible, Matt.

[overlapping conversation]

1:15:10 MS: Okay, well, let's end at 11:15. I'm going to just say a few quick more things, like I went through and double checked all of these resources before this call. All the links will work when you get this PowerPoint. And I added Brian's great additions to our collective set of work to the list. So you guys can get access to those. When we post the slides and the recording of this webinar, it'll be in the system admin hub. If you don't have access to it, send us an email and we'll get you access. And remember to log in every once in a while so that you don't get purged from that database. August 19th is back on regular schedule, every third Wednesday at 1:00 eastern. And we will talk to you then unless you get another note from us, but it's delayed for whatever reason, but we don't anticipate that at this point. So August 19th is it. Okay, here it is. Drum roll. Why did this... Now I just remembered and it made me smile again. Why does the scarecrow get an award? Because he's an expert in his field.

[laughter]

1:16:28 MS: You are all the experts in your field, and we're privileged to work with you on this crazy thing called HMIS. So keep us posted on AAQ what else we could be doing for you, and we will talk to you again in a couple of weeks. Thank you. Thanks, Fran, Brian, Meredith, you're all just great. Thanks, Tommy Joe in the background.

1:16:47 MA: Thanks everyone.

1:16:47 FL: And take care.

1:16:49 BR: Bye, everyone.

<https://scribie.com/files/1de3426b14954b57accaefc8a7b5cccd3f17d6e>