Steve Ellis: Good afternoon, everyone. We are very excited that you could join us today. Welcome to Session 2 of our HOPWA Office Hours regarding the new HOPWA consolidated APR and CAPER.

Before we get started, just some quick housekeeping things. First and foremost, we really hope that you all are going to ask a lot of questions.

So, for purposes today, please feel free to put any questions specifically into the Q&A function. The Q&A function of Zoom will go directly to all of the panelists and particularly some of our panelists that are monitoring the Q&A.

Please feel free to use the chat to throw in any comments or things that you'd like to see on the backend. Particularly, right now, if you could use it to introduce yourself, who you are, how you touched the HOPWA program, and anything else that's important that you'd like to use to introduce yourself such as your pronouns, your ethnicity, anything else for how you identify. That'd be great.

Right, so and we'll say this now, right? We will make sure that when we are done today, we will share today's slide deck with everyone. Also, today's slides and a recording of today's slides will end up on the HUD Exchange as soon as we can get them up and running. So, once again, any important questions into Q&A, introductions into chat.

(Long pause)

So, looking through the chat, I saw there's a lot of friends from the past. Hello, friends! For those of you who don't know who I am, my name is Steve Ellis. I'm a senior analyst at The Cloudburst Group.

I am joined today by two coworkers—Heather Rhoda also from The Cloudburst Group and Jonathon Sherwood. He'll be behind the scenes helping to answer some of those important Q&As. We also have Claire Donze from the Office of HIV Housing also in the background to help address any Q&A that come up.

So, during today's Office Hours we have a few things that we'd like to cover. So, the first thing we want to go through is some frequently asked questions.

So, through our initial webinar, and our first Office Hours, and some of the things have either been emailed to us or sent through the HOPWA AAQ, we just want to remind people of some questions that keep getting asked or some new things that have come up. So, we'll start with that.

We also want to start to lay the groundwork for communities to think about how this new consolidated APR and CAPER is going to change what's going to happen on the ground, right?

So, between starting to think about your data collection methods at that level, but also any process to collect that data, report on the data how the grant and project sponsors are going to need to communicate. So, while we won't be able to address all programs out there and all program setups, we at least hope to give you some information, so you could start to think about how all of these changes might result in changes at the local level.

We're also going to do just sort of a quick reveal of the Excel workbook itself. So, while we aren't going to go into great detail on it yet on this Office Hours, at least you can see how it's set up and get a sense of how it's going to function as you get the workbook in the future.

So, let's go through some of those FAQs. So, one of the first things to remind people—as we keep getting the question—is when are grantees going to need to switch from using the old APR and CAPER, and need to use the new consolidated form?

So, as a reminder, for anyone whose reports are originally due on or before December 31, 2022, you're going to be using the old form, the Word form, and the old process. So, particularly if you've been doing HOPWA reports for a while, you know what that is, right?

You'll get an email from Cloudburst. We're going to email that Word version back and forth. But that also means you're aggregating at that grantee level.

For reports with original due dates on or after January 1, 2023, grantees, you're going to use the new process and it also means you're going to use the new forms. So, you're going to get an email that outlines who your project sponsors are. You're going to get individualized workbooks for all of those project sponsors, right?

You'll stop aggregating your data. Instead, you'll send in the project sponsor ones.

So, once again, that change is going to be all based upon its due date. It's worth noting for any of our competitive grantees who are listening that if you have not expended and reported on all of your CARES Act funds, no matter what you're going to continue to use the old CARES Act APR form until all of those funds are expended and reported on, all right?

So, even if your due date is after the first for CARES Act competitive grantees, you will continue to use the old form.

(Long pause)

So, we keep getting questions too about when do you know that you need to actually switch, right? So, beyond the emails or that due date we talked about, we want to remind people you're still going to get emails from Cloudburst, right?

That email's going to include what we believe your due date is. It's going to include some tips, some hints, some resources to help you, but most importantly that attachment that we always send, right?

So, you're going to get that attachment that if your report is due December 31st, you're going to see the Word version, right? If your report's due January 3rd, right? You would've gotten emails before asking about project sponsors. Furthermore, our email from you is going to include Excel workbooks.

So, even if you're not sure about what to do because you're not sure about the due dates, you'll be very clear from the emails that you receive about what that process is and what needs to be filled out.

(Long pause)

We received a lot of questions about grantees that also deliver HOPWA assistance directly to eligible persons, right? So, they're the grantee in that they signed a grant agreement with HUD, but in a way, they are also the project sponsor because they deliver the assistance.

 So, if a grantee delivers HOPWA assistance, they're going to need to basically fill up two separate workbooks. One of which will be the grantee workbook which is very high-level information and because they also deliver direct assistance, they will also need to fill out a separate project sponsor workbook.

So, this will also be clear in the emails that you receive from us, right? To say, "Here's your list of project sponsors." It includes your name meaning that you need to fill out a workbook as well.

(Long pause)

So, particularly—if some of you weren't aware—while the Excel version of the new consolidated APR/CAPER isn't available, the PDF version is. So, we're continuing to see questions about the new data elements and

when those should be collected, when you should start collecting them. So, HUD recommends that everyone—grantees and project sponsors—begin collecting the data from these new questions as soon as possible, right?

So, if you aren't aware of what some of those are, our last office hours went over some examples. Furthermore, that PDF version is available online. So, you should've received an announcement from HUD exchange about that.

But also, when you get this slide deck, it is hyperlinked here. It's HUD form 4155. So, you can start to look through, see what questions are asked, what's new, changes to some of the questions, and start to plan around some of this.

But once again, we want to remind people that HUD's aware that there are some changes to this report. There are some new data elements. HUD's aware that the data will also need some adjustment during this first year, right?

So, if you have questions, if you need help, always reach out. But don't worry. HUD recognizes that the first year of reporting under this form is going to be a change for everyone.

(Long pause)

So, about some of those changes. We've received some questions about the health outcomes. So, particularly, one of the questions we received is whose health outcomes need to be reported on in this consolidated report? Is it just the person who qualified their household for assistance or all household members including the beneficiaries of assistance?

So, hopefully, this is clear. But you're only going to report on the health outcomes of the HOPWA-eligible individuals and that's those people who qualified their entire household or family for assistance.

So, when you look at the health outcomes, you're not worried about reporting on everyone in a family and whether or not they have ARTs or their viral load. You're just reporting on those who qualified their household for assistance.

Heather Rhoda: You need to add there were only two places in the provider workbook where you need to provide some data on health outcomes. That's for Tenant-Based Rental Assistance—TBRA—and permanent facility-based housing. So, it's not all the HOPWA housing activities, only two of them.

Steve Ellis: Great! Thank you for that.

(Long pause)

So, regarding those on meds, ARTs, and improved viral loads, we got a question about what verification is needed to document, right? These questions, right? The answers people give.

To answer this question, there are no specific verification requirements related to reporting on health outcomes, right? So, that means when you ask this question as a part of an intake, as a part of an application, as a part of an update, you aren't required to get the labs to back that up as part of reporting, right?

Because while HOPWA is a supportive housing program and we do hope that people are using their housing stability to improve their health outcomes, to get, and stay on meds, and reduce their viral load which will also help community viral load and stops the spread of HIV.

It's worth reminding people, right? Going to the doctor, taking meds, staying on meds? Those aren't HOPWA requirements. So, that's why documentation of that is not required as part of the HOPWA program.

Now if your specific program design includes non-HOPWA, right? So, you might be asking these questions for other programs as well. You'll need to consult with those programs if there's additional documentation requirements. But at least for HOPWA—particularly when it comes to these questions—there are no verification or documentation requirements.

(Long pause)

Another great question about these health outcomes with how should we report on HOPWA-eligible individuals served during this reporting year who were already virally suppressed, right? Either before receiving HOPWA assistance at all or before the reporting year began.

So, the guidance is all HOPWA-eligible individuals who are virally suppressed during the reporting year should be included, right? So, this includes those persons who entered the reporting year already virally suppressed as well as those who entered the HOPWA program virally suppressed, right?

So, if during this reporting year someone says that they are virally suppressed, you're going to include them under that TBRA or permanent facility as someone who saw an improvement or is virally suppressed. There's no reason to separate it, right?

	Maybe they were virally suppressed two years ago, or they were before they came on the program. You're just going to report on all those virally suppressed persons together.
Heather Rhoda:	(Long pause)
	We're going to be showing later where those health outcome questions are when we take a little sneak peek of both the Excel tools.
Steve Ellis:	(Long pause)
	So, we received some questions too about insuring—
Heather Rhoda:	Yeah.
Steve Ellis:	--how to report on certain insurance types.
	So, some of those questions include where do we report on households within insurance types not listed in the Types of Insurance chart located in the workbook. So, if you haven't looked at the PDF, or when you do, or you can see as part of the sneak peek, this Types of Insurance chart only lists some specific insurances that HOPWA currently wants to know about.
	But clearly, people are going to have insurance types not listed there. So, that doesn't mean you aren't asking about them. It just means they don't get reported in that specific chart.
	But the workbook still includes an Access to Care section which is going to ask about insurance. So, that's one place you can account for these households who access or maintain other types of insurance not on the chart, right?
	So, just because the Types of Insurance chart doesn't list all of the insurances that you know clients have, doesn't mean that that data's not useful and isn't going to show up in this report. It just means it's going to show up in the Access to Care section.
Heather Rhoda:	That also tells you that those two things don't need to match.
	(Long pause)
Steve Ellis:	So, some of the terminology we've used during our webinar and first Office Hours is rooted in some other definitions. A lot of those definitions are part of the workbook, right?

So, if you look at the PDF or when you get the workbook yourself, you'll see one of the tabs includes definitions. But we received a few questions about what do we mean by "institutional arrangement", right? Because that is one of the housing outcomes.

So, we just wanted to list here some examples of what an institutional arrangement might be, right? So, it could be those who are going to a Mental Health support institution, a rehab institution regardless of the type of rehab, a senior care facility, or really any other thing that looks like this, right? Where they're going to receive care in a group or facility setting.

So, from doing this for a few years, we are aware that every part of the country has a slightly different program, and some things have some things that other states don't have. So, the answer to this question, if you have a question about the definition? When it's your turn to fill this out or even before, feel free to ask so that we can ask some follow-up questions about what might be going on.

But at least if you think about this big picture, right? Is that an institutional arrangement or some of these places that you probably have in your neck of the woods?

(Long pause)

We brought this up during the last Office Hours and we wanted to bring it up again because particularly now to insert the definitions. But this tool includes some information about VAWA.

There were a number of questions about some of the definitions for VAWA. So, one of the things was about what is a VAWA emergency transfer. So, that definition comes straight from VAWA regulations.

An emergency transfer under the VAWA protections allows tenants who are the victim of domestic violence, dating violence, sexual assault, or stalking to request an emergency transfer from the tenant's current unit to another unit, right?

So, they're requesting a transfer from one unit or another because of the domestic violence going on in that situation. So, that process is called an emergency transfer and that is something that the new tool asks about.

But it breaks down the type of emergency transfers into two different types. So, there's an internal emergency transfer and an external emergency transfer. These definitions also come straight from VAWA regulations.

So, an internal emergency transfer refers to an emergency relocation of a tenant to another unit where that tenant would not be categorized as a new applicant. Meaning that tenant may reside in a new unit, but they're not undergoing a new application or screening process, right?

They're just picking up from one unit and going to another. There's no application. There's no application fee. It's just moving from one to another versus external is an emergency relocation where the tenant would be categorized as a new applicant meaning that the tenant had to undergo some sort of application process in order to move into that new unit.

So, particularly for some of these new data elements like VAWA emergency transfers, it is going to require some internal thought processes about how you're going to ask and collect these. But at last, you're going to want to start with the federal definitions of these terms to make sure you have the process set up to track this data correctly and not defining it by what you might think it is.

(Long pause)

Take a quick breather here to remind people—particularly some of the latecomers—that if you do have any questions—and we encourage any and all questions—to please put them into the Q&A. We may not get to all questions today. If we don't, we'll follow up.

But as always, the questions that you guys ask, drive the future Office Hours. They drive some of the tools and resources that we're working on. So, please ask all questions about HOPWA reporting in this reporting tool, so we can make sure to address those in some way, shape, or form.

(Long pause)

So, the change to the reporting process—the change to the form—may result in a number of changes that need to occur at that local level, who works on this, and how those changes get rolled out.

So, in the last Office Hours, we received a number of questions about where should these costs be charged, right? So, where do grantees and project sponsors charge costs incurred for updating reporting systems and tools for program staff and program staff spent on HOPWA reporting?

So, as a reminder, HOPWA program staff, time and cost associated with updating reporting tools, and processes, and compiling, and completing the consolidated report must be charged to HOPWA administration unless

they're using non-HOPWA funds leveraging those funds to cover these costs.

So, the time spent on updating reporting systems, the tools, compiling and filling out this consolidated APR/CAPER can't be charged to tenant-based rental assistance, or to STRMU, or to PHP, or to Support Services and can only be charged to HOPWA Administration because it's a function of administering the HOPWA grant.

Once again, unless you're using non-HOPWA funds to leverage those costs. Then clearly, it would not be charged to HOPWA Admin.

(Long pause)

So, those are our FAQs from the last couple of webinars and Office Hours. I'm going to throw it over to Heather who's going to talk about how this form may result in some changes to your data collection process and your internal validation process.

Heather Rhoda: All right, folks. Welcome! So, we're going to be taking a look at there's just a few slides for folks to think about because obviously, right? Changes in this form and this process will likely affect how you're collecting data locally. So, here are just a few slides with things to think about and consider.

As mentioned earlier, for internal reporting processes, we talked about this a few times. HOPWA programs should begin collecting data as soon as possible. But this may also mean that programs will need to review their current data collection methods and reporting processes, right?

The processes that the grantee has with its project sponsor to communicate and report on HOPWA required data. In addition, this may also involve updating current data storage systems or systems you're using where you're keeping all your data and all this information, and any tools that you're using to actually collect the data for HOPWA reporting.

For instance, so with the addition of the gender categories and health outcome data elements, you're going to want to make sure that the tools you're using and your data systems are updated to collect this information from the assistant households and to be sure that you can have a place, right? Once you collected this information to actually enter that into your current data system.

So, you'll be able to report on that later when your reports are due. Data, you're going to want to make sure too to take a look at and update as-needed data systems and internal reports that you're using to actually

answer the questions on the HOPWA APR/CAPER workbook which we're going to show soon to account for these changes.

So, when I think about this being a former grantee, I think about things like what would I be using to collect this information? Application, right? For housing subsidy assistance, do I have a universal data elements form? What types of questions and information are included in my intake packets?

When you collect all that, do you have a place to actually enter that information—these new changes or expanded data elements—into your current system? So, what needs to be changed in that system, right?

You also need to think about what does that system do, right? The reports that are run from that system, what needs to be changed and reconfigured, so you can dump all that information out of your current data system to then be used to fill out the new workbooks. Next slide.

(Long pause)

The Grantee Data Validation Process—here we're talking about the process that's going to be occurring between grantees and Cloudburst because Cloudburst is still doing the data validation process and working with grantees to complete that process.

So—like we keep saying—initially, too as you're getting used to this new workbook and this new tool, grantees may need to start planning HOPWA reporting earlier than in past years. As we've mentioned also in previous Office Hours, grantees are going to receive an email from Cloudburst a bit earlier than you did in previous years.

So, now you're going to receive an email 150 days before your report is due versus 120 days. In this email, this email will include information about the data validation process to include a prefilled chart that will be attached.

This chart, grantees will need to take a look at it to confirm the list of project sponsors that are included on the chart here on this screen. So, you'll see that there'll be a project sponsor row number, and then a grantee name, and then the I.D., and then information about what we have based on the systems we're using about who your project sponsors are. This will be important because this will inform us about how many workbooks you should get for your project sponsors and also how many of them need to be customized.

Do you need one project sponsor workbook? Do you need five project sponsor workbooks? Do you need three project sponsor workbooks?

So, it's important when you get this email to make sure you're looking at this to confirm who the project sponsors are that were operating and delivering assistance during the reporting year and then get a hold of us if there is something incorrect or something needs to be added. Next slide.

(Long pause)

Once confirmed—once we get information from you about your project sponsors—grantees, you're going to receive an email from HOPWAReports@ HUD.gov. This email will then include those individually customized Excel workbooks based on your confirmation of the project sponsors in that chart that we sent you.

You will have one workbook for the grantee and you'll have a different workbook for each project sponsor. Then the grantee will send each individual project sponsor workbook because they'll be customized and I'm going to show you in just a minute where that customization is. You're going to have to send each workbook to each project sponsor. So, a certain workbook is tagged for a certain project sponsor.

(Long pause)

Next slide.

(Long pause)

There are some previous Office Hours where we laid out the 150-day email, the 90-day email, the 60-day, and the 30-day, and how that will flow back and forth. So, I definitely encourage you to go back because all of them have been posted now. Is that right, Steve? Have all the previous Office Hours and any associated materials been posted?

Steve Ellis:	They have and one of our—
Heather Rhoda:	Okay.
Steve Ellis:	--last slides have hyperlinks to everything that is currently available. So—
Heather Rhoda:	Okay, great.
Steve Ellis:	--we'll have that as soon as they get this slide deck.

Heather Rhoda:	Okay. So, more information about the grantee validation process. You're also going to think about and consider how you might need to change a few things, right?
	Because you're going to have individually customized workbooks for each project sponsor. So, you're going to want to take a look at how you're currently internally validating, right? In tracking your own project sponsor reports back and forth internally.
	But you're also going to want to think about how you're tracking that once you've submitted them for review and validation. So, say, for instance, you get your grantee workbook and you have five project sponsor workbooks.
	You're going to have to come up with a plan, right? Of how you're going to submit those altogether. Are you going to submit them by each project sponsor workbook you get or as a complete package?
	But then upon validation, there might be some workbooks that have data validation errors and some that don't. So, then we'll be working with you, so you can work with your project sponsor to make those corrections. So, you just want to be mindful of how you're going to track the corrections and the project sponsor workbooks.
	I think I've pretty much covered every bullet included here. Another reminder too, remember all workbooks must be submitted by the grantee, not the project sponsor.
	So, the project sponsors, when they're done with their workbook, they do not submit their report directly to HOPWAReports@HUD.gov. It's the grantee that does that.
	We just wanted to note too, all communication between HOPWAReports@HUD.gov and Cloudburst will be with the grantees, not with individual project sponsors.
Steve Ellis:	This will be a good time to remind grantees listening to please keep everyone up to date if you do have staff turnover. But particularly, through the past two years we are well aware that there is staff turnover at the grantee level—sometimes multiple staff within one year.
	So, for those staff that are listening, you should try to make a plan to make sure that if you are leaving, that they're aware to not only update Cloudburst. But there are additional places where you should be updating your contact information. So, if we send an email to a grantee and it bounces back, we can look.

So, the HUD Exchange is one place that it lists the point of contact for a program. If you need to update your HUD Exchange contact information—as I am aware that some are a bit old—please look on the HUD Exchange and you can contact the HUD Exchange for how to do that.

For those of you that have IDIS access, there is also a place in IDIS where you can make sure that you have updated contact information. So, these are all points that you're going to want to think about that are part of any exit or onboarding to make sure those are updated because not only is it easier for those trying to contact your program, but you'll see the timeframe is key on getting a hold of someone, right?

So, if we send out an email 150 days—

Heather Rhoda: Right.

Steve Ellis: --and we don't have correct update information, and we can't get a hold of anyone till 90 days before it's due, you've lost a lot of time.

So, think through that as well and update. Update HUD Exchange, update IDIS, send emails to Cloudburst, and email HOPWA@HUD.gov. Just keep us up to date on who the point person is for your program.

Heather Rhoda: Right, and who the point person is who's going to be completing the report.

Steve Ellis: Because we're good at finding you all, but sometimes we just can't find a program. So, definitely because of this timeframe and seeing some of the Q&As that are coming in, right? About this timeframe, right?

Heather Rhoda: Yep.

Steve Ellis: The more that you prep us, the more we make sure that you have as much time as you need to work on this.

Heather Rhoda: (Long pause)

Next slide.

Steve Ellis: I just want to remind people, particularly before we take that sneak peek. So, this is that same place if you have questions and if you have thoughts. If you have concerns, please throw that in the Q&A. The same to be said as Heather's scrolling through this, right?

It really drives the TA that we give on this. So, the more feedback that we get from you all the better.

Heather Rhoda: Also, remember too, this is just an overview to show you what the Excl version itself looks like.

(Long pause)

Okay, I am making sure I am sharing my screen now. I want to make sure that everybody can see my screen.

So, Steve, if you can see my screen, I'm going to assume everybody can.

Steve Ellis: I can see your screen. You are sharing the grantee workbook of the—

Heather Rhoda: Right.

Steve Ellis: --consolidated APR/CAPER.

Heather Rhoda: Great, okay. So, here we have the Excel version of the grantee workbook. How can you tell it's the grantee workbook?

Because it says it right here—grantee workbook. Another way you can tell it's the grantee workbook is because it has seven tabs. That's it—seven tabs.

So, when you open the grantee workbook, you're going to see the performance report cover. This essentially looks the same as the PDF, but it's just an Excel version.

So, you're going to see the performance report cover which just provides general information, right? And some definitions.

The next tab includes instructions for completing the grantee workbook. So, these instructions, there will be some instruction similarities between the grantee workbook and the provider workbook. But the instructions are tailored to each workbook because there are different tabs in each workbook.

So, as a former grantee and somebody who used to complete HOPWA APRs, just take your time and get yourself familiar with the tool itself, right? Read the instructions. Go through each tab and look at the questions before you start filling it out.

So, the next tab is Identification. This is where some of the customizations is going to play in, in that this tab will be prefilled by Cloudburst based on

all the information we have about the grantee and who the grantee's project sponsors are for this reporting period—for the period you're reporting on.

One thing of note—please absolutely review this tab, but don't make any changes to it. If anything seems incorrect—like the grantee name or the project sponsors that are listed here—please follow up by sending an email to HOPWAReports@HUD.gov and then we can make the changes on our end.

The next tab titled Grantee is really just the grantee summary. At first, you're going to notice a subset of questions that are for competitive grantees only. So, if you're not a competitive grantee, then you don't answer those questions.

Then there'll be another subset of questions that are for all grantees. But also, read this carefully because you'll see beginning in this row there are a few questions that are related only to formula grantees.

Everything else is pretty straightforward—street address, city, county, state the grantee's office is located, zip code, etc. If you have a waiting list, things like that.

You'll also notice too, there's a question—does the grantee provide HOPWA-funded services directly? So, yes or no.

So, if that would be a yes, then you would also be completing a provider workbook which Steve mentioned earlier. This is where you'd be entering your information about grantee admin. Moving on to the next slide.

Contact—this is literally the contact information for the grantee. So, if none of these sections or buckets of contact applies—for instance if you're not using HMIS—then it's okay to leave those blank.

If you have to repeat contact information—say, for instance, the primary and secondary contact are the same or the secondary program contact and the contact for the individual seeking services are the same—it's okay to include repeat information.

The next tab is the Narrative slide. So, this is where you're going to answer questions about the program.

So, this will entail the entirety of your program. Although the grantee is responsible for answering these questions and providing responses to these questions directly on this form, you may find it helpful to review these questions with your project sponsors, right? So, they can give you some

input into how to answer these questions based on the activities that they deliver.

Remember you have a maximum of 4,000 characters. This will do the character count for you.

The last tab is Stewardship. So, this would only apply if you have some facilities that are still under the applicable minimum use periods.

As you can tell here, there are a number of columns based on how many stewardship facilities there are. So, you would just answer each question for each facility. So, this is Facility one, two, three, and four, so forth.

Now let's take a look at the provider workbook. Okay. Here is the provider workbook. How do you know it's the provider workbook?

Because it says on it HOPWA Provider. This performance report cover is exactly the same as in the grantee workbook. This will be the workbook that grantees will be distributing to each of their project sponsors.

You'll also notice the difference because this workbook includes a lot more tabs than the grantee workbook. It could very well be too—are people not seeing the provider workbook? No?

Steve Ellis:	It is currently still the grantee workbook.
Heather Rhoda:	Uh-oh, so there's a delay.
	(Long pause)
	How's this?
	(Long pause)
	Sorry, folks.
Steve Ellis:	Right, it's still the grantee.
Heather Rhoda:	Let me stop for a minute and then—
	(Long pause)
	Okay. Let's try this.
	(Long pause)

	How is this?
Steve Ellis:	You are good. This is the project sponsor workbook.
Heather Rhoda:	Okay, thank you. All right. All right, sorry about that, folks. Got to love technology!

So, here is the provider workbook. You're going to know it's the provider workbook because it says HOPWA provider on the report cover. This report cover is exactly the same as the grantee workbook.

This workbook also has more tabs than the grantee workbook. This will be the workbook that grantees are distributing to each of their project sponsors to complete. It doesn't mean every project sponsor will complete every tab in the workbook. They're only going to complete the tabs based on the activities they were funded for and delivered during the reporting period.

This is the Instructions tab. There is some repeat information from the grantee instructions, but this instruction tab is geared toward the provider workbook.

So, like I said earlier with the grantee workbook, grantees it makes a lot of sense for you to become familiar with the provider workbook, and even I recommend going over and reviewing the provider workbook with your project sponsors.

Here we're at the Identification tab. This is where each provider workbook will be customized. So, when a grantee receives a workbook, it will have a grantee I.D. name, a grantee I.D., the grantee name, a sponsor I.D., the sponsor name, and a file I.D. Each workbook will only have one sponsor name on it because that is for that project sponsor, that specific provider.

The HOPWA provider—this is similar to the grantee tab where this is a summary of the information about the provider themselves—the organization name, the unique entity identifier or tax I.D., questions like that—fax numbers, website.

Of course, if there are situations where an organization doesn't have a Twitter handle, it's fine. You don't need to fill that in if it doesn't apply.

The next tab is the Contact tab. This only has three types of contact—a primary, secondary, and individual seeking services. If there are some duplications between contact people, that's fine also.

(Long pause)

Let's take a look at the Demographics tab. The Demographics we know—we've talked about before—have changed a little bit. We've expanded the gender categories and the universe of whom you're collecting demographic information about is also expanded.

So, you're collecting information about age, gender, race, and ethnicity for all households served with all types of HOPWA assistance. So, this includes the standard HOPWA housing subsidy assistance types—TBRA, permanent transitional facility-based housing, short-term facility-based housing, STRMU, PHP, and other housing activity.

This now also includes Supportive Services and Housing Information Services. So, the top portion of this chart is for information about the HOPWA-eligible individual. Essentially, the person who qualified the household for assistance or in many cases, that might be whom you call the Head of Household.

In the second portion of the chart, this will collect information for other household members or beneficiaries. So, this simply is the other people who are living with the HOPWA-eligible individual. So, even collecting race, gender, age, and ethnicity about those folks as well.

When you scroll down to the bottom portion of the chart, note there are some differences here. The top portion of the chart you're collecting information about all HOPWA types of assistance.

But the bottom portion of the chart is for prior living situations for individuals served with TBRA permanent facility-based housing, short-term transitional facility-based housing, or PHP only, right?

So, you're not including Housing Information Services. STRMU folks are not included in this, nor are people who receive Support Services. So, just be mindful when you're going through the report and reading the directions.

Leveraging is pretty much the same as it always has been. You just go through and answer the questions based on the leveraging type and what it was for.

Now we're going to look at TBRA. Really what I'm going to show you here is the health outcomes. You can see here on this screen, this is what Steve was talking about earlier regarding health outcomes. Health outcomes are required as part of TBRA and permanent facility-based housing.

So, there are two questions here. How many individuals served with TBRA ever—have ever been prescribed ART? The other question is about showing an improved viral load or achieving viral suppression. So, this is related to TBRA.

You'll see you have sources of income, area median income amounts, and health insurance types. This is what Steve touched on earlier is that obviously there isn't every single type of insurance listed here. But you could capture some additional information when you're completing access to care.

I'll show you here the permanent facility-based housing and the health outcome. Sorry, I'm scrolling through this. Here are the health outcomes for permanent facility-based housing.

So, because this is permanent facility-based housing, you would be answering these questions for each facility itself. So, Facility One, two, three, four, five, etc.

The Short-Term Transitional tab is set up similarly to the permanent facility-based housing. Health outcomes do not apply here. Again, you're going to answer questions for each facility—Facility One, two, three, all the way to how many we have here. There are quite a few on this form for everybody.

The next one will be STRMU. You'll just go through and answer the questions about providing STRMU. Similar to what was done before—how many people receive mortgage only, rental only, and utilities only? Provide information about how many households receive more than one type and then you'll be breaking that down.

You'll see too that there are some commonalities between each tab whereas you're going to be reporting on sources of income, and sources of medical insurance through each housing subsidy assistance tab.

Here we have permanent housing placement. Permanent housing placement—as everybody knows—is a separately funded activity. It's not funded out of Supportive Services. That's why it has a separate tab and it is considered HOPWA Housing Subsidy Assistance.

So, similar to the other Housing Subsidy Assistance tabs, you'll have questions about sources of income, medical insurance, etc. Housing Information Services is a fairly short chart. All you're going to be doing is entering the number of households that were served with housing information and the amount of funding.

Supportive Services looks very similar to the Word version of the APR/CAPER. So, you're reporting on the number of households and expenditures. You'll be doing some de-duplication.

Then we're moving on to other housing activity which is fairly short. Here you have your access to care totals. I'm not going to review much of this chart, but I wanted to point out this activity review tab here.

You'll note that when you started filling out the provider worksheet—this workbook—when you go to this tab, under TBRA—if you delivered TBRA—this number will be automatically generated based on what you entered previously in TBRA about how many households you served with assistance.

So, I just wanted to point that out. So, don't be surprised if you see these because this is automatically filling this in for you.

You have capital development. Again—much like the other facility's tab—you would answer questions about each capital development facility. Finally, the BAWA tab.

So, this will be filled out and it's required if you had individuals request emergency transfers. If they requested that, I'm sorry. If that is the case, you would need to differentiate between internal emergency transfers and external emergency transfers.

So, this is what the layout—the Excel layout—of the workbooks each looks like. I'm going to stop sharing.

Steve Ellis:	(Long pause)

I will start sharing again. Thank you for that, Heather.

So, as a reminder, what Heather just went through is that PDF version that's available. That hyperlink has been thrown into the chat. It's included as a hyperlink on these slides.

There's been a HUD Exchange announcement. That PDF version is just both combined, right?

So, if you start that PDF you're going to see a note that says, "This is the grantee only." You'll see a few pages of the PDF. There'll be another note that says, "The project sponsor workbook starts here."

So, both are part of that PDF altogether. You just need to scroll through to find the different documents.

(Long pause)

All right, as always, everyone, you all have submitted some really great questions—some things that we need to look into. As always, there are some things that we're going to follow up with offline.

There are a few questions that we think are really great. But instead of going back and forth during a live webinar, we're going to reach out to you all to get some more specific information to address your question.

So, we apologize now if your question wasn't answered or isn't answered in time. But we will follow up with all of these questions at some point.

But I did want to spend a few moments highlighting some of the questions that came in to make sure that everyone can hear them now. The very first one I want to throw out I'm going to prepare Claire for because I think this is a great HOPWA/HUD question.

The question is why do grantees have to complete the paper CAPER, right? Of the HOPWA paper, as well as a CAPER in IDIS. Could you address that?

Claire Donze:	Yes! So, the HOPWA Consolidated APR/CAPER that we are speaking about today fulfills the HOPWA program-specific reporting requirements for the year. The "IDIS" Caper is for your CPD Con plan requirements.
	So, the HOPWA-specific questions in that Con Plan CAPER—as I'm sure all you former grantees know—is quite limited. The two fulfill different reporting requirements.
Steve Ellis:	Absolutely! I always remind people too because this question comes up a lot now is that in the same way, right? You're submitting more specific data for your other programs as well such as ESG.
	It just so happens that HOPWA and CPD/IDIS use the same terminology as CAPER. It uses CAPER, but as Claire mentioned, there are different requirements. So, they fulfill different program requirements which is why you, unfortunately, have to do both.
	There is a question asked. I'm going to just slightly change the question. But there was a question about how other non-TBRA rental assistance is defined, right?
	So, what I just want to change this up a little bit and remind people listening is that for some grantees—particularly through competitive— they have been approved to do other forms of rental assistance.

So, if you hear other rental assistance and you don't know what that means, chances are you've not been funded for that. Those who have been funded for that should be aware of that.

When push comes to shove and you're not sure particularly competitive grantees look at your renewal submission and approval, as well as your grant agreement because it would be outlined as other rental assistance. You would know what that is. If you don't have that in your grant agreement, then it's something that you do not have to worry about.

(Long pause)

Are there any other good questions, everyone, that we should bring up?

(Long pause)

Heather, I've got a question for you. Are you ready? I think you've got this.

For health outcomes, what if a household has two persons living with HIV? So, they would both technically qualify. Do you collect and report on health outcomes for both individuals?

Heather Rhoda:	No, you're only collecting the health outcomes for the HOPWA-eligible individual or what you might be referring to is the person who is that Head of Household, right?
	Yeah.
Steve Ellis:	So, even if you have multiple people in a household or family with HIV, on the report you're only reporting on that Head of Household—that person that you determine qualifies, everyone.
Heather Rhoda:	Right.
Steve Ellis:	So, even if you ask the questions and collect it, you're still going to report on that one.
	Another question for you, Heather. Are health outcomes required for master leasing programs?
Heather Rhoda:	I even already answered that one. Master leasing is considered a type of facility-based housing.

So, if somebody's master leasing program is permanent facility-based housing, then yes, the health outcomes are required. If you're instead doing master leasing as transitional or short-term facility-based housing, then no. The health outcomes are not required.

Steve Ellis: So, master leasing is just a form of either permanent, transitional, or short-term facility-based—

Heather Rhoda: Right.

Steve Ellis: --housing?

Heather Rhoda: Right.

Steve Ellis: So, you'll need to figure out—

Heather Rhoda: If it's permanent, yes.

Steve Ellis: Right.

Heather Rhoda: So, if you're filling out this report, and you're operating a master leasing program, and you're filling out the Permanent Facility-Based tab because it's permanent, then yes. The health outcome questions apply to that.

Steve Ellis: Here's another great question, Heather, as long as I have you off mute. So, particularly—

Heather Rhoda: Oh, I can change that. I can.

Steve Ellis: So, I think this comes up a lot, but particularly when you are reviewing the Access to Care chart. So, someone wants to know, "Can you explain the difference between HOPWA-funded case management and HOPWA Support Services?"

Heather Rhoda: Well, HOPWA people—

Steve Ellis: Because depending on what people get might change.

Heather Rhoda: Right. Well, HOPWA-funded case management is one of the eligible subsets or types of supportive services somebody could be receiving.

So, that question is specifically related to who received access to care, housing subsidy assistance, and HOPWA-funded case management versus housing subsidy assistance and HOPWA Supportive Services. So, it's specifically asking about the case management piece.

Steve Ellis:	Right. For any of our panelists listening, there seem to be a few questions about this user manual that we referred to or some of the recordings. So, can someone answer any questions around when the estimated date for some of these additional tools will be released?
Heather Rhoda:	But around the user manual, the goal is for it to be issued this month.
Claire Donze:	We will push out a Listserv message announcing when that's available—
Steve Ellis:	Right.
Claire Donze:	--on the HUD Exchange.
Steve Ellis:	Yeah.
Claire Donze:	So, if you do not currently receive HUD Exchange Listserv messages for HOPWA specifically, make sure you sign up because that's where we will be pushing out announcements for all of the new resources.
Steve Ellis:	There was a question about what does a grantee who purely functions as a grantee, right? They do not direct services. What do they need to fill out?
	So, just as a reminder. If you are purely a grantee, you do not do any direct services to clients. You will only fill out the grantee workbook, but you will be required to fill out the grantee workbook.
	As you saw when Heather was showing this, it's pretty short, right? There are not a lot of questions for you to answer because all of the detailed information is at that project sponsor level.
	But if you are a grantee that also does some direct work with clients, so you deliver HOPWA assistance, you will fill out a grantee workbook and you will fill out a project sponsor workbook to get into some of those details for which only the project sponsor workbook has.
Heather Rhoda:	For example, some grantees, right? Their grantees have some providers or project sponsors administering delivering activities locally—delivering say TBRA—tenant-based rental assistance, short-term rent and utility assistance—STRMU--and some other activities.
	But the grantee might also administer some TBRA, or maybe permanent housing placement, or housing information services. So, if that's the case, then you would need to fill out both workbooks.
	(Long pause)

Steve Ellis:	So, Claire, I see you answered this question for someone. I think it's going to come up a lot, so I'll ask it for everyone.
	So, for under "Gender Reporting", what if you asked a question and a client chooses only transgender, right? They don't answer in a way that clearly lines up with the options in the workbook.
Claire Donze:	Yeah. Yes, if a client does not identify their specific gender or they do not identify their gender as one of the specific categories listed in the workbook, that client can be counted in the "gender not disclosed" category.
Steve Ellis:	Excellent. Well, that question ties into another question that has come up that I think I'll ask for everyone. So, these health-related questions are new.
	For some programs, they have been asking this question, or a form of this question, or maybe even more detailed questions for a period of time. For some project sponsors, they may not have been asking it or asking it in such a direct way.
	So, particularly in these situations—and it might be new for project sponsors and more direct—can clients refuse to answer the health-related questions? Do any of the panelists want to address that?
Claire Donze:	Sure, I can. Yes, for health-related questions, a client can refuse to answer. That's true of gender as well. Yes.
Steve Ellis:	Absolutely! So, really for anything that's not required for HOPWA eligibility—which is just the HIV status of one person in the family including that could be a minor and then to assure that income is at or believe 80% AMI or lower if it's a local requirement, right?
	Those are the only two HOPWA eligibility requirements. So, a lot of these questions are things that should be part of an intake, an application. They're great for program design. They're great if you're offering case management and support services.
	They can help you move clients through your housing continuum and graduate them to non-HOPWA resources. The questions you ask can be great, but they're not required because they're not tied to eligibility.
	So, absolutely in many of these situations, clients can refuse. Once again, to reiterate, in some of these situations, if it's not a HOPWA requirement, you want to make sure you're not making it a HOPWA requirement, right?

So, not asking about meds and then creating the meds as a barrier to get or stay housed. Studies have shown if people get and stay housed, they're more likely to engage in medical care, to start meds, and to continue taking meds. So, that should not be a reason that you refuse someone's housing assistance or terminate someone's housing assistance.

(Long pause)

I'll at last highlight one more question. If the panelists want to see if there's anything else, but there's a question I think that's important about how often this report is due—particularly, how often this report is due to HUD because I do think that there are a number of programs that have traditionally used the HOPWA report as an internal process, right?

So, Claire, maybe this is a question for OHH. But how often is this report due to HUD?

Claire Donze:	HOPWA reporting is required at the annual timeframe. So, no more than annually.
Steve Ellis:	If a program has a local requirement to use HOPWA reports for monthly or quarterly, HUD is not asking to see or validate those?
Claire Donze:	Correct.
Steve Ellis:	Great because once in a blue moon for some of you listening, you will send monthly or quarterly reports. Just a reminder that this is a form created by HUD for annual reporting. Anything else that you do at the local level would be a local requirement and you can use that for whatever you need it for. But that would exist outside of the annual HOPWA reporting requirements. (Long pause) Panelists, is anything else that has come up? Any other points? Any other new questions that you want to address in our last few minutes?
Claire Donze:	(Long pause) Nothing from me. I think we covered a lot today.
Steve Ellis:	Okay. So—
Heather Rhoda:	I agree.

Steve Ellis: So, in those last few minutes, everyone, please continue to throw in questions or anything else into the chat and Q&A. So, there are a few more slides to go over before we end.

So, as we mentioned, there are some resources currently available. So, the PDF version of this consolidated APR/CAPER is online, the HUD 4155, and the hyperlink is there.

Some of our webinars, our Office Hours, and all of the published tools will also end up on the consolidated APR/CAPER landing page on the HUD Exchange. So, you'll have access to this hyperlink here. So, you can go back and check it.

So, not only—as Claire mentioned—will we send out announcements saying, "This is published" or "This is available", but when push comes to shove or when in doubt, go back to that landing page. That's where it will be published.

As we talked about, as soon as we get them done and start to push them out, we do have some easy tutorials, right? So, we'll have videos walking you through certain sections, right? Going through details and line-by-line to help you all—particularly project sponsors—think about how to fill this out. We also have that usual manual.

While not necessarily reporting-related, but it is HOPWA related. While we have all of your attention for a few minutes, we want to highlight some of the recent things that have gone out from the HOPWA office and HOPWA TA for some of the current issues.

So, as a reminder that HOPWA put out guidance about the community-wide exception rent standard, and what some flexibilities and guidance is to create a rent standard. Part of that notice states you had 120 days from the publication of that notice to make sure you are in compliance with that, right?

So, please make sure in your program if you're not sure if you're compliant, to read that notice, to make sure you are because 120 days is coming up.

But also, a recently published tool. If you are a grantee that you know you need to seek HUD permission for your rent standard, we have created a rent standard submission checklist. So, it's just some things to think through, some ideas to mull around, and some examples of documentation that could help your submission.

Now we also want to highlight that due to some of the recent Hurricanes—Fiona and Ian—that HUD has published some waivers for some of those communities—particularly in Puerto Rico and Florida—that are currently in counties or municipalities that are under considered disaster areas.

So, if you are listening, and you are part of one of those communities, and one of those counties or municipalities, it might be worth looking at these waivers to see what flexibility the HUD program is offering not just for HOPWA, but for many of your other HUD programs to help you all during the difficult times that you're currently facing due to these natural disasters.

(Long pause)

So, upcoming things to put on your calendar. So, we do have one more Office Hours scheduled. So, make sure to mark that. Announcements will go out as soon as we can with some details.

There are also plans for a HOPWA Race, Gender, and LGBTQ+ Equity Initiatives, some updates, and some lessons learned sometime during this fall, right? So, look for some announcements of that as well to learn what the HOPWA program's been working on for equity.

Finally, this was a lot. This is a lot of information, right? So, if you have questions, or if you need some TA around data reporting, you can reach out. If you need TA—Technical Assistance—around anything HOPWA, right?

So, particularly as you start to wrestle with program design and questions, you can also request technical assistance to help you think through some of this and operationalized changes by submitting a TA request on the HUD Exchange.

Also, if you have any questions about anything HOPWA related—reporting, eligibility, you name it. If it touches HOPWA, you can submit a HOPWA AAQ. That can be grantees or sponsors.

If you touch the HOPWA program, submit that AAQ, so you can ask your question and get an answer, so you can continue to keep doing the great work that you all do.

Heather Rhoda:	I just wanted to mention to definitely use the AAQ if you have questions about reporting because we are receiving some questions currently through the HOPWA AAQ. So, that could be a good resource for everybody.

Steve Ellis:	That is all we have for today, everyone. I say that with sincerity because it was actually a lot.
	So, as always, we thank you all for carving out some time of your busy schedules to talk with us about something that we are aware isn't always your favorite topic. There are some of you listening that really enjoy this and there are some of you listening that don't. So, we really do appreciate the time that you guys spend with us to learn more about this.
	Once again, if you have questions, feel free to reach out. Otherwise, we thank you all and we wish you all a good day. Anything else from any other panelists?
Heather Rhoda:	Great! Thank you, everybody. Please let us know if you have questions.
Claire Donze:	Thanks, everyone.
Steve Ellis:	Take care, everyone. Bye.

[End of Interview]