Exercise 4: Reporting on Accomplishments
HOPWA Competitive Grant Program
July 2012

Purpose: To practice completing Accomplishment Screens for activities in the User Acceptance Testing (UAT) server

Scenario: The Main Street Housing Corporation (MSHC) has been awarded a three-year competitive grant from the HOPWA program in the amount of $700,000. The grant has been awarded to cover the following services:

Grantee: MSHC will operate a permanent Facility Based Housing Subsidy Assistance program for a total cost of $471,000. The budget will be broken down as follows:

- $450,000 for operating costs (3 years @ $150,000 per year)
- $21,000 for administration (3% of the overall grant award or $7,000 per year)

Project Sponsor: MSHC has contracted out with one project sponsor Case Management Associates (CMA) to provide supportive services to residents at a total cost of $229,000. The budget for CMA will be broken down as follows:

- $212,970 for Case Management Services (3 years @ 70,990 per year)
- $16,030 for administration costs (7% of the project sponsor award or $5,543 per year)

Activity:

Part One: Completing the Accomplishment Screens for Services Activities

1. Go to http://www.hud.gov/offices/cpd/systems/idis/idis.cfm
2. Scroll to the bottom of the page until you see **Training on the UAT Test Server**
3. Click on **External Users (Grantees)**
4. Log into the UAT Test Server using your IDIS account number and password
5. Click the **Plans/Projects/Activities** tab at the top of the screen.
6. Click **Search** under **Activity** in the left side of the screen.
7. Find the activity for which the user intends to enter accomplishment data and click **Edit** in the column labeled **Action.**
8. Click **Add HOPWA-C Accomp.** in the column labeled **Accomplishment.**
9. Click **Accomplishment Year** and enter the Accomplishment Year for activity. Remember this is the 12-month period for which the activity will operate according to the HOPWA Competitive Grant Agreement. Accomplishment year may be different than the Grant Year or the Program Year.
10. When all of the performance data has been completed and verified, click **Yes** in the field labeled **Final Data for Annual Report.** This will signify to HUD that the performance data is ready for review. Do not click **Yes** until all of the data entry fields following it are completed and verified.

11. Complete the **Accomplishment Narrative** for the designated **Accomplishment Year.** The narrative should include the following information:
    a. Description of the program design
    b. Barriers and successes to implementing the activity
    c. Explanation of how well the program met targets established in either the Consolidated Plan/Annual Action Plan or Competitive grant agreement
    d. Information about how well the program helped clients to improve access to care, address disparities, and improve health and housing outcomes
    e. Technical assistance needs
    f. Description of coordination with other activities, programs and government agencies including those providing supportive services, HIV care, housing and workforce development
12. Answer the performance questions for the Activities created in Exercise 2. Use the manual *Using IDIS for the Housing Opportunities for Persons With AIDS (HOPWA) Program* to assist with questions for each individual activity.

Part Two: Completing the Accomplishment Screens for Project Sponsor Reporting Activity

1. Click the **Plans/Projects/Activities** tab at the top of the screen.
2. Click **Search** under **Activity** in the left side of the screen.
3. Find the activity for which the user intends to enter accomplishment data and click **Edit** in the column labeled **Action.**
4. Click **Add HOPWA-C Accomp.** in the column labeled **Accomplishment**
5. Complete the **Project Sponsor Reporting** screen by following the steps below:
    a. Click **Accomplishment Year** and enter the Accomplishment Year for activity. Click **Save** and the system will display the remaining data fields.
    b. When all of the performance data has been completed and verified, click **Yes** in the field labeled **Final Data for Annual Report.** This will signify to HUD that the performance data is ready for review. Do not click **Yes** until all of the data entry fields following it are completed and verified.
    c. Complete the **Accomplishment Narrative** for the designated **Accomplishment Year.** The narrative should include the following information:
        i. Description of the program design
        ii. Barriers and successes to implementing the activity
        iii. Explanation of how well the program met targets established in either the Consolidated Plan/Annual Action Plan or Competitive grant agreement
        iv. Information about how well the program helped clients to improve access to care, address disparities, and improve health and housing outcomes
        v. Technical assistance needs

d. Description of coordination with other activities, programs and government agencies including those providing supportive services, HIV care, housing and workforce development The table entitled **Housing Subsidy Assistance Actual Accomplishments Adjustment for Duplication** automatically populates with the **Households Served with HOPWA Funds** and **Households Served with Leveraged funds** from data entered within the activity accomplishment screens for TBRA, Facility Based Housing-Subsidy Assistance, STRMU and PHP. The only data entry field in this table is the Row entitled **Housing Subsidy Assistance (or Leveraged Assistance) Goal Adjustment for the Households that Received more than one type of Housing Subsidy Assistance from the same Project Sponsor (subtract).** In this field enter the number of households that received more than one type of housing subsidy assistance from the *same* Project Sponsor during the operating year. For example, if a household received STRMU at the beginning of the year and entered the TBRA program with the same Project Sponsor later in the year, the adjustment for duplication would be one (1).
e. Enter the **Sources of Leveraging** for the Project. In the first column, enter the amount of leveraged funds received for **Housing Assistance** and in the second column, enter the amount of leveraged funds received for **Supportive Services and Other Non-Direct Housing Costs.** Rows have been provided with the names for common sources of leveraged funding in the categories of **Public Funding, Private Funding,** and **Other Funding.** Click **Add Other Public** or **Add Other Private** to report additional **Sources of Leveraging.** ***Note:*** *Include all rental payments made from clients in a TBRA program directly to the landlord in the Row labeled **Resident Rent Payments.** Do **not** include payment made from clients to a HOPWA program here. Money collected by a HOPWA Project Sponsor or Grantee as part from a client is considered program income and will be reported in a different table.*
f. Enter the **Program Income and Resident Rent Payment Collected** during the operating year. ***Note****: In the Row labeled **Resident Rent Payments made directly to the HOPWA program** do not include rental payments made from clients in a TBRA program directly to a private landlord as should have been counted in the **Sources of Leveraging** table.*
g. Enter **Program Income and Resident Rent Payment Payments Expended on HOPWA Programs.**
h. The table **Total Possible Households to be used in reporting Access to Care** will summarize data reported in the TBRA, Facility Based Housing Subsidy Assistance, STRMU, PHP, and Supportive Services accomplishment screens to help the Grantee determine the cohort of clients to use in reporting **Access to Care Outcomes** in the **Grantee Reporting Activity**. The column labeled **# of households that received Housing Subsidy Assistance only** will automatically populate from the earlier table **Housing Subsidy Assistance Actual Accomplishments Adjustment for Duplication.** There is no data entry required in the first column. The second column labeled **# of households that received Housing Subsidy Assistance with HOPWA Funded Case Management** will automatically populate from the question "**Of the total number of households served with HOPWA Housing Subsidy Assistance, how many also received**

HOPWA-funded Case Management services from the Project Sponsor during the operating year?" which appeared within the TBRA, Facility Based Housing Subsidy Assistance, STRMU and PHP activity accomplishment screens. Enter the **Adjustment for Duplication (subtract) for households that received more than one type of Housing Subsidy Assistance from the Project Sponsor during the operating year.** This is the only data entry field in this table.

i. Click **Save.** Remember that if the performance data is ready for HUD review, the user will need to click **Yes** in the field labeled **Final Data for Final Report** before saving and notify both their local HUD field office and OHH at HOPWA@hud.gov that the report is ready for review.

Part Three: Completing the Accomplishment Screens for Grantee Reporting Activity

1. Click the **Plans/Projects/Activities** tab at the top of the screen.
2. Click **Search** under **Activity** in the left side of the screen.
3. Find the activity for which the user intends to enter accomplishment data and click **Edit** in the column labeled **Action.**
4. Click **Add HOPWA-C Accomp.** in the column labeled **Accomplishment**
5. Complete the **Grantee Reporting** screen by following the steps below:
   a. Click **Accomplishment Year** and enter the **Accomplishment Year** for activity. Remember this is the 12-month period for which the activity will operate according to the HOPWA Competitive Grant Agreement. Accomplishment year may be different than the Grant Year or the Program Year. After entering the Accomplishment Year, click Save and the remaining data entry fields will become visible.
   b. When all of the performance data has been completed and verified, click **Yes** in the field labeled **Final Data for Annual Report**. This will signify to HUD that the performance data is ready for review. Do not click **Yes** until all of the data entry fields following it are completed and verified.
   c. Complete the **Accomplishment Narrative** for the designated Accomplishment Year. The narrative should include the following information:
      i. Description of the program design
      ii. Barriers and successes to implementing the activity
      iii. Explanation of how well the program met targets established in either the Consolidated Plan/Annual Action Plan or Competitive grant agreement
      iv. Information about how well the program helped clients to improve access to care, address disparities, and improve health and housing outcomes
      v. Technical assistance needs
      vi. Description of coordination with other activities, programs and government agencies including those providing supportive services, HIV care, housing and workforce development
   d. Complete the table entitled **Housing Subsidy Assistance Actual Goals Adjustment for Duplication**.
      i. Row 1 will automatically populate with the total Housing Subsidy Assistance numbers from all the **Project Sponsor Reporting Activity Accomplishment** Screens. Remember this total has already been adjusted for households that received more than one type of housing subsidy assistance from the same project.
      ii. In Row 2 of this table, enter the **Housing Subsidy Assistance Goals Adjustment for Duplication between Project Sponsors** by entering the number of households that received more than one type of housing subsidy assistance between <u>different</u> Project Sponsors during the operating year.

iii. Row 3 will automatically subtract the adjustment for duplication (Row 2) from the pre-populated total in Row 1. The total reported in Row 3 is the final unduplicated household count for housing subsidy assistance for the service area. ***Note:*** *The total in Row 3 is the household count that should be used for reporting all demographic and beneficiary totals*.

e. Complete the table entitled **Supportive Services Actual Goals Adjustment for Duplication**.
   i. Row 1 will automatically populate with the total Supportive Services household count from each of the **Project Sponsor Supportive Services Accomplishment** Screens. Remember this total has already been adjusted in the Supportive Services Activity Accomplishment detail for households that received more than one type of housing subsidy assistance from the same Project Sponsor.
   ii. In Row 2 of this table, enter the **Housing Subsidy Assistance Goals Adjustment for Duplication between Project Sponsors** by entering the number of households that received more than one type of Supportive Service between different Project Sponsors.
   iii. Row 3 will automatically subtract the adjustment for duplication (Row 2) from the pre-populated total in Row 1. The total reported in Row 3 is the final unduplicated household count for HOPWA supportive services for the service area.

f. Enter the **Sources of Leveraging** for the Grantee. In the first column, enter **the amount of leveraged funds received for Housing Assistance** and in the second column, enter the **amount of leveraged funds received for Supportive Services and Other Non-Direct Housing Costs**. Rows have been provided with the names for common sources of leveraged funding in the categories of **Public Funding**, **Private Funding**, and **Other Funding**. Click **Add Other Public** or **Add Other Private** to report additional **Sources of Leveraging**. ***Note:*** *Include all rental payments made from clients to in a TBRA program directly to the landlord in the Row labeled Resident Rent Payments. Do not include client payments made directly to a HOPWA Project Sponsor or Grantee. These payments would be considered program income and will be reported in the next table*.

g. Enter the **Program Income and Resident Rent Payment Collected** during the operating year. ***Note:*** *In the Row labeled Resident Rent Payments made directly to the HOPWA program do not include rental payments made from clients in a TBRA program directly to the landlord. This row should include client rental payments made directly to a HOPWA program (e.g., rents from clients living in a HOPWA-funded facility-based housing program).*

h. Enter **Program Income and Resident Rent Payment Payments Expended on HOPWA Programs**.

i. Complete the table entitled **Beneficiaries**.
   iv. In Row 1, for individuals and families served with HOPWA Housing Subsidy Assistance, enter the **total number of Persons who qualified the household for housing subsidy assistance**. ***Data Check:*** *Since there can only be one person*

who qualified each household for housing subsidy assistance, the total number of persons reported in Row 1 equals the total number of unduplicated households served with housing subsidy assistance as determined above (Item number 6.d.). __Note:__ This number will be used as the reporting pool for the table entitled Prior Living Situation.

v. In Row 2, enter the **total number of ALL other persons diagnosed as HIV positive**. ***__Note:__*** *Be sure to observe all rules regarding confidentiality for family members. This data element does NOT require that all family members provide documentation of HIV status. If the HIV status of a household member is not available, report those household members in Row 3.*

vi. In Row 3, enter **the number of All other persons without HIV**. This total will include both those family members diagnosed as HIV negative and those whose HIV status is unknown.

vii. Row 4 will automatically populate with the total number of beneficiaries. ***__Note:__*** *This number will be used as the reporting pool for the tables entitled Age and Gender and Race and Ethnicity.*

j. Complete the table entitled **Prior Living Situation** for all individuals who qualified the household for Housing Subsidy Assistance during the operating year.

i. In Row 1, report all households **Continuing** [in the HOPWA program**] from the Prior Operating Year**.

ii. In Rows 2 -4 report all individuals who entered into the HOPWA program during the operating year from homelessness by entering the number of individual with prior living situations described as **Place not meant for human habitation**, **Emergency Shelter**, or **Transitional Housing for Homeless Persons**.

iii. Row 5 will automatically total Rows 2-4. This total represents the number of individuals who entered the HOPWA program during the operating year from homelessness.

iv. Use Rows 6-17, to report the prior living situation for all other individuals who entered the HOPWA Program during the operating year.

v. Row 18 will automatically populate the totals of Rows 1, 5, and 6-17.

vi. ***__Data Check:__*** *The total number of reported individuals in Row 18 equals the total number of persons who qualified the household to receive for housing subsidy assistance as reported in Row 1 of the table entitled **Beneficiaries**.*

k. Complete the table entitled **Homeless Individual Summary** by answering the following:

i. Of TOTAL HOPWA eligible individuals served with housing subsidy assistance, number who are homeless veterans.

ii. Of TOTAL HOPWA eligible individuals served with housing subsidy assistance, number who are chronically homeless.

iii. Of TOTAL HOPWA eligible individuals served with housing subsidy assistance, number who are homeless with children under the age of 18

b. Complete the table entitled **Age and Gender**.

i. Report the **Age and Gender** of all persons who qualified the household to receive Housing Subsidy Assistance in the appropriate columns: **HOPWA Eligible Individuals (Male), HOPWA Eligible Individuals (Female), HOPWA Eligible Individuals (Transgender M to F)** and/or **HOPWA Eligible Individuals (Transgender F to M)**.
ii. Report the **Age and Gender** of all other beneficiaries who benefitted from Housing Subsidy Assistance in the appropriate columns: **All other Beneficiaries (Male), All other Beneficiaries (Female), All other Beneficiaries (Transgender M to F)** and **All other Beneficiaries (Transgender F to M).**
iii. The total for each column will automatically populate.
iv. ***<u>Data Check:</u>*** *The sum of the totals of all the columns in the **Age and Gender** chart equals Row 4 in the table entitled **Beneficiaries**.*

c. Complete the **Race and Ethnicity** table.
i. Report the identified Race for all persons who qualified the household to receive Housing Subsidy Assistance in the column labeled HOPWA Eligible Individuals. The row labeled **Total** will automatically sum the persons entered in each racial category. ***<u>Data Check:</u>*** *Each person who qualified the household for housing subsidy assistance must have a reported race; therefore, the total reported in the columns labeled **HOPWA Eligible Individuals** will equal the total number of persons who qualified the household to receive for housing subsidy assistance as reported in Row 1 of the table entitled **Beneficiaries**.*
ii. Report in the column labeled **HOPWA Eligible Individuals-Hispanic** the number of persons by racial category that identified as Hispanic. The row labeled Total will automatically sum the persons entered in each racial category. ***<u>Note:</u>*** *This is a subset of the total HOPWA Eligible Individuals reported. There is no data check for this category.*
iii. Report the identified Race for all family members who benefitted from Housing Subsidy Assistance in the column labeled **All other Beneficiaries**. The row labeled **Total** will automatically sum the persons entered in each racial category. ***<u>Data Check:</u>*** *Each person who benefitted from the housing subsidy assistance must have a reported race; therefore, the total reported in this column will equal the total of Rows 2 and 3 in the table entitled Beneficiaries.*
iv. Report in the column labeled **All other Beneficiaries-Hispanic** the number of persons by racial category who identified as Hispanic. The row labeled Total will automatically sum the persons entered in each racial category. Note: This is a subset of All other Beneficiaries reported. There is no data check for this category.

d. Enter the **Area Median Income of Households** for each household that received housing subsidy assistance during the operating year. The row labeled Total will automatically total the households entered in each row. Data Check: The Total reported in this table equals the total reported in Row 4 of the table entitled Housing Subsidy Assistance Actual Goals Adjustment for Duplication.

e. Complete the table entitled **Total Possible Households to be used in reporting Access to Care** and **Number of Income Producing Jobs**. This table will help the user to determine which clients to report Access to Care outcomes for and will be used by HUD as a basis for analyzing the percentage of households who demonstrated or maintained connections to care and support.
   i. Row 1 of this table will automatically populate in the following way:
      1. Column 1 labeled **Households that received HOPWA Housing Subsidy Assistance Only** will populate the number of households that received TBRA, STRMU, Facility-Based Housing Subsidy Assistance, and/or PHP from each activity. This will include households that received housing subsidy assistance but did NOT receive HOPWA-funded Case Management.
      2. Column 2 labeled **Households that received HOPWA Housing Subsidy Assistance and HOPWA-funded Case Management Services** will populate the number of households that received TBRA, STRMU, Facility-Based Housing Subsidy Assistance, and/or PHP from each activity. This will include households that received housing subsidy assistance AND HOPWA-funded Case Management.
      3. Column 3 labeled **Households that received HOPWA funded Case Management ONLY** will populate from the Supportive Services activity. This will include households that received HOPWA-funded Case Management ONLY.
   ii. In Row 2, enter the **Adjustment for Duplication between Project Sponsors (subtract)** for each column.
   iii. Row 3 will automatically subtract the **Adjustment for Duplication between Project Sponsors (subtract)** reported in Row 2 from the totals populated in Row 1. Note: The total of Rows 1-3 represents the client households to be used for reporting Access to Care and Households that Obtained Employment.

f. Complete the table entitled **Access to Care** by indicating the number of households from the table entitled **Total Possible Households to be used in reporting Access to Care and Number of Income Producing Jobs** that:
   i. **Had a Housing plan for maintaining On-going Housing** during the operating year.
   ii. **Had contact with case manager consistent with the schedule specified in client's individual service plan**
   iii. **Had contact with a primary health care provider consistent with the schedule specified in the client's individual service plan**
   iv. **Accessed and maintained medical insurance/assistance** during the operating year
   v. **Successfully accessed or maintained qualification for sources of income.**
   g. Complete the table entitled **Households that Obtained Employment** by entering the **Total number of households that obtained an income-producing job** during the operating year.

6. Click **Save**. Remember when completing in live IDIS the user will need to click **Yes** in the field labeled Final Data for Final Report before saving and notify both their local HUD field office and OHH at HOPWA@hud.gov that the report is ready for review.