

Welcome to “MSHDA’s ESG-CV and HMIS Roundtable”

- All attendees are on mute
- Please use the chat for any questions
- Can’t chat? Use the hand raise to be unmuted
- Audio/visual issues? Log out and log back in
- CEUs? Type **CEU Sign In** into the chat at the start of the session and **CEU Sign Out** at the end
- This session will be recorded



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CHALLENGE**

2020 MICHIGAN'S VIRTUAL
SUMMIT ON ENDING HOMELESSNESS

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OCTOBER 28 & 29

MSHDA's ESG-CV and HMIS Roundtable

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Agenda

- ESG-CV: What's the Latest?
- HMIS Reporting Groups and Provider Pages
- CAPER: Overview and What to Look for
- Sage: Tips and Considerations
- Next Steps
- Resources
- Q & A



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Poll: Who's in the room?

- **Grantees (Recipients) of City and/or County ESG-CV**
- **Fiduciaries:** The first stop off point for MSHDA funding. Can be direct project or 'pass through'.
- **Sub-Grantees:** Direct projects funded by MSHDA.
- **Independent Jurisdictions vs Local Planning Bodies**
- **HMIS System Administrator and/or HMIS Lead**



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ESG-CV: What's the Latest?

- Round 1 funding: August 2020
- Round 2 funding: Applications available in November
- HUD Guidance: 9/1/20
- First ESG-CV CAPER: 10/30/20

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HMIS Provider Pages and Reporting Groups

HMIS Provider Pages are set up in ServicePoint for each project funded by ESG-CV. Pages are where data is stored and organized for a specific project

TIP #1 Refer to the HMIS Provider Page Creation and Settings Guidance Document

TIP #2 Audit your HMIS Provider Pages

- Use the QLIK Report (REQ 102)

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HMIS Provider Pages and Reporting Groups

HMIS Reporting Groups are a group of provider pages built by project type on a quarterly or cumulative basis

Consider the following if you are the HMIS lead for ESG-CV city/county

TIP #3 Use a Naming Protocol

Ex: Hamtramck - RRH - City
ESG-CV (3/1/2020 –
9/30/2020)

**TIP #4 Talk to your ESG
Recipient Early and Often**

**TIP #5 Create a Project
Master List**

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CAPER - Overview

CAPER is the report that captures information of people served by projects receiving ESG-CV funding

TIP #1 Use the Finding and Fixing Data Quality Errors in the ESG CAPER Document

TIP #4 Create a CAPER line of communication

TIP #2 Run and review the CAPER on a monthly basis

TIP #5 Don't Worry!

TIP #3 Establish a data error threshold



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CAPER – What to Look For!

TIP #1 Double check prompts and identifiers

TIP #3 Highlight Clients that may have errors in multiple sections

TIP #2 Use the Previous Parameter button when rerunning the CAPER

Use Previous Parameters

The screenshot shows the 'Client Filter' interface. At the top, there is a 'Client Filter' header with a prompt: 'Enter Client IDs separated by commas to highlight cells containing those Clients.' Below this, there is a 'Client IDs' input field containing '998708', a 'Client Search' button, and a 'Highlight Clients' button circled in red. A red arrow points from the 'Highlight Clients' button to the 'Report Validations Table' at the bottom of the page. Another red arrow points from the 'Client IDs' input field to the 'Project Identifiers' table above. The 'Project Identifiers' table has columns for Organization Name, Org. ID, Project Name, Project ID, HMIS Project Type, Method, Affiliated with a residential project?, Project IDs of Affiliation, CoC Codes, Geocodes, and Victim Service Provider. The 'Report Validations Table' has four rows of validation data.

#	A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Organization Name	Org. ID	Project Name	Project ID	HMIS Project Type	Method	Affiliated with a residential project?	Project IDs of Affiliation	CoC Codes	Geocodes	Victim Service Provider																
Michigan Statewide HMIS	1	Michigan Statewide HMIS	1	Other (HUD)				MI-500	Missing	False																

Report Validations Table	
1. Total Number of Persons Served	5*
2. Number of Adults (age 18 or over)	1
3. Number of Children (under age 18)	1
4. Number of Persons with Unknown Age	3*

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CAPER - What to Look For!

TIP #4 Confirm Project Identifiers (CAPER 4a)

TIP #5 Confirm Number of Persons Served with Staff

TIP #6 Fix Missing or Incorrect Information

TIP #7 Track Timeliness

Time For Record Entry
0 days
1 - 3 days
4 - 6 days
7 - 10 days
11+ days

TIP #8 Review Outcomes and Plan for the Next Quarter

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Sage- Tips and Considerations

Sage is the HMIS Reporting Repository that is used for submitting the CAPER to HUD

Consider the following if you are the HMIS lead for ESG-CV city/county

TIP#1 Use the Sage Practice Portal



Test a CSV-CAPER FY2020

TIP#2 Confirm Project Bundles

- Time is of the essence! Changes must be made within **3 business days**

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Sage- Tips and Considerations

TIP#3 Fix all Errors

- Sage ESG CAPER Guidebook provides a detailed overview of errors
 - Ex. Number of projects in Sage vs. HMIS reporting group

TIP#4 Select “Attach to Jurisdiction” for each project bundle *only* when you are ready to submit

Attach to Jurisdiction if everything is correct

 Attach to Jurisdiction

TIP#5 If all else fails, ask for help!

- MCAH Help Desk
- MSHDA Representative
- HUD AAQ

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Next Steps

- Run ESG-CV CAPERs and submit with your Financial Status Report (FSR) submissions
 - ✓ ESG-CV FSR schedule on MSHDA website
- Review data between FSR submissions
 - ✓ Run monthly data quality reports to stay on top of data quality issues
- Check in with subgrantees (especially new subgrantees!)

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Resources

HMIS Learning Center

- Provider Page Creation and Settings Guidance
- Finding and Fixing Data Quality Errors in the ESG CAPER
- HMIS ESG CV FAQ

HUD ESG-CV Reporting Requirements Training Series for City/County ESG Recipients

- Instructional videos for City/County ESG Recipients

HUD ESG-CV Reporting Guidance

- Provides specific instruction related to reporting for ESG-CV

HUD Sage ESG CAPER Guidebook for ESG funded Programs

- Assists with the data entry into SAGE



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Resources

HUD ESG Program HMIS Manual provides detailed information related to the data collection requirements for projects funded by ESG (including ESG CV).

HUD Data Standard Manual provides a detailed definition of the required data elements and associated standards. This includes a rationale, data collection instruction, system logic and other system issues, revision summary, and data element fields and responses.

HUD CoC APR and ESG CAPER HMIS Programming Specifications provides guidance related to how the APR and CAPER will be built by vendors.



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Q & A

Please send your questions via chat

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Questions

- What role do DV projects play in the ESG CV CAPER submission to Sage?
- What are the requirements for Service Transactions in HMIS?
- What will the *next* report look like?
- What will the 2nd round of funding look like?



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