

# How to Run & Read the ESG-CAPER in HMIS

Released February 2021

Version 3



**NC COALITION** to end  
**HOMELESSNESS**

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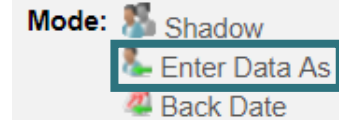
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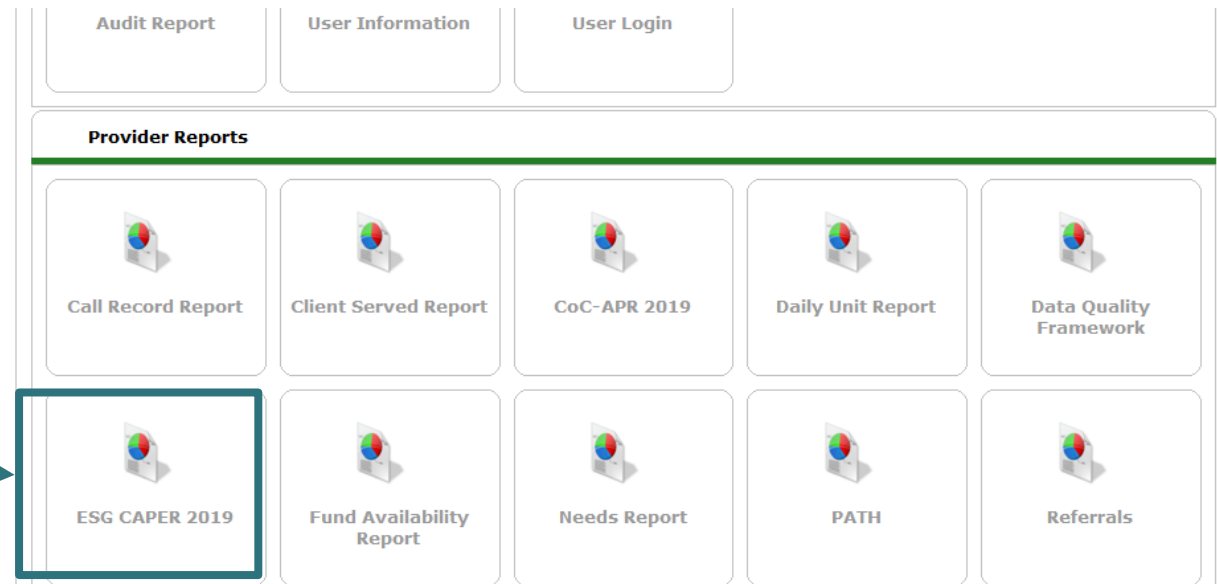
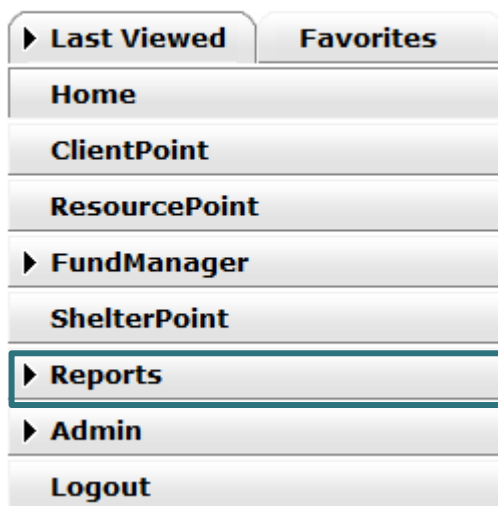
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# How to Run the ESG-CAPER

1. Login to ServicePoint ([hmisncceh.servicept.com](https://hmisncceh.servicept.com))
2. EDA as the project to run the report for
3. Click “Reports” on the left side of the Home Page Dashboard
4. On the Report Dashboard, click “ESG-CAPER



Home > Home Page Dashboard



# How to Run the ESG-CAPER

5. The Report Options section has the prompts to run the ESG-CAPER. Complete the prompts:

Prompt	Description	Required?
Name	Customize a name for this particular report	No
Description	Additional detail about this particular report	No
Provider Type	Select “Provider” <i>*Special Note: If you have consolidated grants that are separate projects in HMIS, contact us ASAP for a reporting group</i>	Yes
Provider	Automatically selected based on EDA mode. Select “This provider ONLY”	Yes
Program Date Range	For Sage submission, use the grant year. For DQ or outcome checks, use appropriate range.	Yes
Entry/Exit Types	Select “HUD” or appropriate funding <i>*Special Note: Never use Basic, Basic Center, Standard, or Transitional Living</i>	Yes

**Report Run History**

**Report Options** Use Previous Parameters

Name

Description

Provider Type

Provider \*

Program Date Range \*

Entry/Exit Types \*

North Carolina Coalition to End Homelessness (2)

This provider AND its subordinates

This provider ONLY

to

Basic

Basic Center

Program Entry/Exit

HUD

PATH

Quick Call

RHY

Standard

Transitional Living Program Entry/Exit

VA

HRP (Retired)

Build Report

Download

Clear

# How to Run the ESG-CAPER

6. Click the “Build Report” button

*Ways to save the results:*







*Here is an example of how the prompts look completed:*

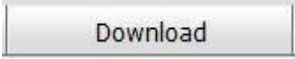
► **Report Run History**

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**Report Options**


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

Name	<input type="text"/>
Description	<input type="text"/>
Provider Type	<input checked="" type="radio"/> <a href="#">Provider</a> <input type="radio"/> <a href="#">Reporting Group</a>
Provider *	<div>Heading Home - Rowan County - Rapid Re-Housing - ESG (7390) ▼</div> <div><input type="radio"/> <a href="#">This provider AND its subordinates</a> <input checked="" type="radio"/> <a href="#">This provider ONLY</a></div>
Program Date Range *	01 / 01 / 2020    to 12 / 31 / 2020   
Entry/Exit Types *	<div><input type="checkbox"/> <a href="#">Basic</a> <input type="checkbox"/> <a href="#">Basic Center Program Entry/Exit</a> <input checked="" type="checkbox"/> <a href="#">HUD</a> <input type="checkbox"/> <a href="#">PATH</a> <input type="checkbox"/> <a href="#">Quick Call</a> <input type="checkbox"/> <a href="#">RHY</a> <input type="checkbox"/> <a href="#">Standard</a> <input type="checkbox"/> <a href="#">Transitional Living Program Entry/Exit</a> <input type="checkbox"/> <a href="#">VA</a> <input type="checkbox"/> <a href="#">(Re)</a></div>

➤ Click the “Download”  button to get the CSV files. ESG grantees will upload this CSV file to Sage.

➤ Use  +  to Save the report as a PDF.

# How to Run the ESG-CAPER – use report history

1. Once you run the report, you can view it by clicking the magnifying glass icon  for the report.
2. To hide/show the history sections, click the **black** arrow.

▶ Report Run History						
	Report ID	Date Ran	Report Type	Name	User	Report Status
	205072	02/22/2021 12:47:05 PM	EsgCaper_2019	Heading Home Housing RRH	Andrea Carey	Running
	204976	02/19/2021 02:22:36 PM	EsgCaper_2019	FCC State ESG FY2020	Andrea Carey	Completed
	204807	02/15/2021 02:58:15 PM	EsgCaper_2019		Andrea Carey	Completed
	204675	02/11/2021 12:40:36 PM	EsgCaper_2019		Andrea Carey	Completed
	204674	02/11/2021 12:39:40 PM	EsgCaper_2019		Andrea Carey	Completed
Refresh Showing 1-5 of 20 First Previous Next Last						

Name allows you to mark different reports and keep track of all the versions

Report Options	
Name	Heading Home Housing RRH
Description	

# How to submit the CoC APR - Overview

**SERVICEpoint**  
Connecting your community.

**North Carolina Coalition to End Homelessness**

User Name   
Password   
  
[Forgot Password](#)

System use requires your compliance with the [terms and conditions](#)  
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## Part 1

Run the APR in HMIS.  
Review the report for data quality issues and make corrections as needed.

Name	Date modified	Type
▼ Today (1)		
CSV-CAPER_FY2020_1614017338976	2/22/2021 1:09 PM	Compressed (zipped) Folder

## Part 2

Download the APR to your computer. Please note that the download is a CSV file.

**Sage** HMIS REPORTING REPOSITORY

Log in:

User Name (email address)   
Password   
  
[Forgot my password](#)

## Part 3

Upload the APR (CSV file) to Sage. Review and resolve errors. With CoC approval, submit the APR in Sage.



# How to use Sage to submit the CoC APR - Resources

Please see additional HUD resources for Sage below.

- **[Sage ESG-CAPER Guidebook](#)**: For information about HUD's ESG CAPER reporting requirements, recipients (like State DHHS or City gov) and subrecipients (individual agencies) should refer to the ESG CAPER Guidebook. The Guidebook also instructs ESG subrecipients on uploading their ESG CAPER CSV directly into Sage.
- **[Sage Guidance for ESG subrecipients Webinar](#)**: HUD has developed training on the process of submitting their reports in the Sage HMIS Reporting Repository. Topics include: How to upload the ESG CAPER report via Comma-Separated Value (CSV) into Sage, Data flow from HMIS to Sage, Common data errors and how to resolve them, Coordination with recipients





## Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc\_end\_homelessness 

## Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



NCCEH