BoS APR Training Webinar

June 28, 2017

10:00 – 11:30
Welcome

- Reminders
  - *6 to mute/unmute line
  - Please do not put us on hold

- Roll call
Today’s agenda

- What’s new in the world of APRs
- How to complete the APR
- BoS review process
- How to use the APR for grant evaluation
New APR Site & Report
Sage has replaced esnaps for APR submissions.

- Change went into effect April 1, 2017
- Sage website: [www.sagehmis.info](http://www.sagehmis.info)

Sage is faster and more organized than esnaps

- HMIS report gets uploaded – no more manual data entry!
- Auto-fills some data (grant dates, project number & type, proposed bed/unit inventory)
- Loads more quickly
- Automatically lists all APRs as they come due
- Lists status: not started, in progress, submitted
The APR in Sage has some new questions.

- All new questions are based on HMIS data
  - Validations and data quality
  - Series of questions about Veterans, chronically homeless people, and youth households (under 25)

- HUD resources about Sage (all on www.hudexchange.info)
  - New [HUD APR Guidebook](http://www.hudexchange.info)
  - Video: [Using Sage to Complete Your APR](http://www.hudexchange.info)
  - Video: [How to Set Up a Sage Account](http://www.hudexchange.info)
There is a new HMIS APR report to match Sage.

- Includes the new questions in the Sage APR

- The new report is quicker to run
  - Fewer prompts, all on one screen
  - Report loads instantly (no scheduling)
  - Can be read in ServicePoint & can click on numbers to see client ID/name
Completing the APR
There are 3 main steps to complete the APR in Sage.

1. Run the HMIS APR report in ServicePoint
2. Upload the report into Sage
3. Complete the non-HMIS questions in Sage
1. Run the HMIS APR report

- NCCEH Data Center guide to running the APR: [www.ncceh.org/files/8292/](http://www.ncceh.org/files/8292/)
  - Gives step-by-step instructions with screen shots

- Download the report
2. Upload the HMIS APR report into Sage.

- Log into Sage and click on your APR

<table>
<thead>
<tr>
<th>RECIPIENT</th>
<th>PROJECT NAME</th>
<th>GRANT NUMBER</th>
</tr>
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<tbody>
<tr>
<td>NC-503: Cardinal Innovations Healthcare</td>
<td>Kerr-Tar PH 4 Renewal 2014</td>
<td>NC0259L4F031403</td>
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<tr>
<td>NC-503: Cardinal Innovations Healthcare</td>
<td>NC-503 - REN - 2012-2013 Shelter Plus Care Renewal NC0031C4F031104</td>
<td>NC0031L4F031205</td>
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- Upload the report under “CSV APR”

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<tbody>
<tr>
<td>Grant Information</td>
<td></td>
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<td>Bed and Unit Inventory and Utilization</td>
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<td>Financial Information</td>
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3. Complete the non-HMIS questions in Sage.

- These questions are very similar to the old APR
  - Financial Information: must match eLOCCS
  - Performance Accomplishments: chance to tell HUD what your program has achieved
  - Additional Comments: explain any discrepancies (common: ineligible entries, underspending)
BoS APR Review
BoS staff have a review process in place to work with grantees on APRs.

- Data Center staff used to review HMIS portion
- Last year, BoS staff started reviewing entire APR

- Review process helps ensure better quality of submissions
  - On time
  - Submitted at all
  - Info reported to HUD is accurate
BoS staff are here to help you!

- **Goals:** improve quality and assist grantees with finding & fixing issues.

<table>
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<th>Time Period</th>
<th>Action Description</th>
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<tr>
<td>14 days after grant ends</td>
<td>BoS emails grantee:</td>
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<td>• APR due date</td>
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<td></td>
<td>• Initial HMIS review date: in 14 days</td>
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<td></td>
<td>• Full APR review date: 30 days before APR due</td>
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<td>28 days after grant ends</td>
<td>BoS does initial HMIS review in Sage</td>
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<td>Emails feedback to grantee (issues to fix)</td>
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<tr>
<td>30 days before APR due</td>
<td>Grantee completes full APR draft in Sage</td>
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<td>BoS completes full APR review</td>
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<td>Emails feedback to grantee (issues to fix)</td>
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<td>OR confirmation to submit</td>
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Data Center staff can assist with changes in HMIS.

- Most common APR issue that BoS staff find is incorrect/missing HMIS data

- NCCEH Data Center staff can help if needed
  - hmis@ncceh.org
  - 919-410-6997
BoS staff see common issues on APRs.

- **Lateness**
  - Can lead to being locked out of eLOCCS
  - Lateness triggers monitoring by HUD
  - Lose points on CoC scorecard for lateness or lose all performance points for no APR
  - CoC has to report # of late APRs to HUD in CoC application

- **Inaccurate financial information**
  - Must reflect actual eLOCCS draws to date
  - Do not use budget, estimates, projections
  - Match ≠ services funds
BoS staff see common issues on APRs.

- Missing HMIS data
  - Income
  - Annual assessments
  - Type of disability (condition unknown)
  - Exit destination
- Exits to “other” destination
- Eligibility issues
  - All entries from eligible location
  - PSH programs: 1 disability per household
Grantees can take steps to improve HMIS data prior to the APR.

- Work on overall data quality
  - Timeliness
  - Completeness
- Run APR report quarterly to catch & fix issues
- Run APR report again at grant end, well ahead of APR deadline
Evaluating Your Grant
Your APR is a useful tool to evaluate the effectiveness of your program

- The APR is more than just a requirement! It tells us about:
  - Compliance issues
  - Targeting
  - Who the program serves
  - Flow through the program
  - Participant income changes
  - Grant spending
Grantees should pull an APR quarterly to evaluate progress

- CoC written standards require grantees to pull their APRs quarterly

- Grantees should pay special attention to:
  - Q2 and Q7: Bed and Unit Utilization: Do the current numbers equal or exceed the numbers in your application?
  - Q7B/Q8B: Is your program keeping units/beds filled throughout the year?
Grantees should pull an APR quarterly to evaluate progress

- Q13A1/2: Physical and Mental Health Conditions at Entry: Does each individual or head of household have a disability?

- Q15: Living Situation: Did each individual or head of household come from an eligible living situation prior to entry into the program?

- Q16: Cash Income: How has cash income changed for households in the program?
Grantees should pull an APR quarterly to evaluate progress

- **Q19A2/3**: Client Cash Income Change (Leavers/Total): Does the program meet the BoS CoC’s earned income threshold?

- **Q22A1**: Length of Participation: How long are leavers and stayers staying in the program?

- **Q23A/B**: Exit Destination: Did households exit to an positive destination?
Grantees should pull an APR quarterly to evaluate progress

- **Q26A**: Number of chronically homeless households: Is the program enrolling chronically homelessness individuals and families?

- **Q28**: Financial information: Is the agency on target to spend at least 90% of its grant funds in the operating year?

- Data quality evaluation!
Get started!

- Start pulling your APRs
  - Identify who in your agency will pull these reports quarterly
  - Set a date each quarter where your team looks at the data and asks questions
  - Initiate new strategies and look at the data over time to see how they affect performance

- You can do this! Make it part of your regular routine.