

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Date: October 18, 2023

Title: Session 3 – Data Systems

Speaker 0 00:00:00 Welcome and thank you for joining today's Special NOFO Startup Session Data Systems. Before we begin, please ensure you've opened the WebEx Chat panel based using the associated icon on the bottom right corner of your screen. Please note that all audio connections are muted until the Q&A portion of the call. You are welcome to submit written questions throughout the presentation. And these will be addressed during Q&A. To submit your questions in writing, select everyone from the dropdown menu in the chat panel, enter your question in the message box provided and send. As a reminder, this conference is being recorded. If you require technical assistance, please send a chat to the in-teller events host with Ed. I'll turn the conference over to Marlisa Grogan HUD's office of Special Needs Assistance Programs. Please go ahead.

Speaker 1 00:00:45 Hi everybody, and welcome to our third session. This is going to be dedicated to data systems. So just a couple of reminders for logistics. We are going to be recording this session and sharing it with you. Please be patient. We have the last two sessions that will be posted to HUD.gov imminently, as will this one. So, please, just patiently wait for those. We're working on getting them posted as quickly as possible. Please use the chat as often as you need to. We're going to be monitoring the chat and providing answers throughout the session. We're also about to start a preliminary Q&A session just to answer any questions that you have to start out with. There will also be time to ask questions at the end of the session, so we'll also have a dedicated Q&A portion of this training at the end. Next slide please. So here is our agenda. We're going to start with questions from the last session, and then we will be transitioning over to the HMIS setup portion, then covering reporting, using data to inform strategic changes. And then rounding out the session with eLOCCS before shifting over to our second closing Q&A session. And with that, next slide please.

Speaker 1 00:02:14 I will pause and just give you all some time to enter any questions you'd like into the chat, and we will answer as many as we need to in the first 10 to 15 minutes. Okay. Let's see. The first question that I'm seeing is, do grantees automatically get TA assigned to them or do they need to ask for ta? So, we are providing technical assistance to all continuums of care that have received special NOFO, unsheltered and rural awards. So, we're, we've assigned coaches to work with continuums of Care and they have been assigned. And all COC's that have received unsheltered awards should have received initial contact from their coaches. If you haven't, please let us know and we can make sure that we've got the right contact information for everyone. So that you have a direct point of contact to our TA resources, you don't need to request technical assistance.

Speaker 1 00:03:41 And then, the TA coaches are going to be working with COC's to determine the level of support needed for recipients. So, there should be that nexus between the support provided for COC's when it comes to, the COC plan, developing the overall strategy for addressing unsheltered and rural homelessness, as well as those with severe service needs. And then also providing programmatic program level support to make sure that projects are, quickly going to grant agreement and, and getting ramped up and executed. So, if you have any questions as a recipient, you should contact your COC if you need technical assistance, but you do have a coach assigned in every case. All right, let me see. Okay, another question. Can stability vouchers be used as a source of match Brett? Can I turn that one over to you?

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 2 00:04:45 Sure thing. So yes, the short answer is yes. Stability vouchers, the PHA paid portion of the stability voucher or a housing choice voucher or any other voucher, from HUD's office of Public and Indian Housing can be used as match. They do have to be committed to the project, so you'll need that letter from the PHA committing them to the project, and then only the PHA portion can count as a match.

Speaker 1 00:05:14 Okay. And I believe that that also answered Sarah, Sarah Butler's question, but Sarah, if you have any additional follow-ups, please let us know. Manny said that he, I love a review of the TH-RRH data workflow, and I believe we will get to that later during this session.

Speaker 3 00:05:39 Marlisa just one note on that. I put a link to the project setup guide for that. I don't know if we have an intent to go over actual project setup for all the projects because it mirrors the COC program set up. to get to the real nitty gritty, though, the details should be in that document. So, if you have some questions about what's in that document, that would be helpful.

Speaker 1 00:06:02 Thanks, William. Okay. And then Dusty's question may or may not have been answered by Brett's initial response. Can housing stability vouchers cover that covering that our tenant housing stability vouchers covered the rent payment used to cover housing costs with a funded PSH program be utilized as match?

Speaker 2 00:06:30 Yep. I think that was answered. Okay, great.

Speaker 2 00:06:33 And say, and Jim's question in the chat also, whether housing choice vouchers can count as match and yes, they can also count if they're committed to the project and it's the, PHA paid portion.

Speaker 1 00:06:47 Great. Okay. If we're both the CoC collaborative applicant and a project grantee, is the TA provider the same? Yes. So, all unsheltered technical assistance is being provided by the same coach. And then if you've received both unsheltered awards and rural awards, you will have the same coach and then coaches will collaborate with subject matter experts as well as SNAP staff. So, to the extent that you that they need to pull in other TA providers for particular areas, we, we have that ability to, to pull them in. So that's, we're trying to take a holistic approach to the technical assistance that you're being provided and making sure that you have the same, the same point of contact. Okay. In regard to timekeeping for funded employees, is block reporting acceptable that is reporting eight-hour days and listing all eligible activities as opposed to reporting the individual amount of time associated with each individual eligible activity? So that is an interesting question, and I don't know if we necessarily have the response to that. Brett, do you want to try to tackle that one or we could postpone answering that.

Speaker 2 00:08:19 I was actually going to see if Taylor or Carrie wanted to take it from a monitoring perspective. If not, we can get back to him later.

Speaker 4 00:08:27 I was just going to say, this is Taylor. I do think, I mean it depends on your setup and your organization and how many federal grants you get and how the different setup is. So, I really would suggest reaching out to your HUD field reps to talk about how you can best set up the time and attendance and activity tracking in your organization. I think that's the best way to go.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 5 00:08:50 I would agree with that. The way I heard the question is, you know, know, are you keeping time for kind of budget line items? And when I go out to monitor, that's not what I'm looking for. I need to know that you worked on that grant and how many hours you worked on that grant each day. But I'm not looking for, did you work on rental assistance, or did you work on supportive services each day and for what amount of time? So, I'm not sure if I understood the question right, but I agree with Taylor to talk to your HUD rep.

Speaker 1 00:09:26 Alright, I'm going to just pause one more moment to see if we have any remaining questions.

Speaker 3 00:09:32 Let me follow up a little bit. Marlisa on the TA question. Sounds

Speaker 1 00:09:36 Good. So

Speaker 3 00:09:37 The TA providers are generally reaching out to the COC's as their starting point. So, if you are a provider and haven't heard from a TA provider, that's probably okay. I would actually first start by talking to your COC to see what assistance you can get. as part of the overall effort. Every provider can have access. It's just that that is being funneled through the, through your CoC. So don't be surprised if you're a provider and haven't gotten that, that out outreach yet.

Speaker 1 00:10:14 Alright. And then to Michael's question, this is being recorded and we will be posting this recording as well as the webinar materials on had gov. So please stay tuned for that and we will provide you all with information about how to access the link. All right. I am now going to turn it over to William for our first agenda item.

Speaker 3 00:10:46 Alright, next slide please. All right, thank you. excited to talk about HMIS, lots of questions. We've dubbed this the best training day, so just in case you weren't clear, we're clarifying that now, who doesn't love a great session on data? so we'll go over some things about HMIS in general and then focus a little bit on reporting. Next slide please. Okay. So, what we wanted to do is make sure that when we're talking about data, we're talking about what we're doing with the special NOFO. We're leading with people with expertise, our people with experience and expertise, they truly are the experts and they're going to be a core component to both how you collect data and how you analyze and evaluate the, the influence and effectiveness of your program. So, we want to be sure that that's, that you are telling a story with your data, but you're including people with lived expertise in this process.

Speaker 3 00:11:48 That, in that involves them in, both analyzing the quantitative data, but also engaging them to find out what the qualitative story is. So, often the quantitative data only tells part of the reality, and you need that other aspect. So, we strongly encourage you to engage people with lived expertise. they have insights that you just couldn't get any other way is the reality. They're engaging with the programs they're experiencing the validity of the impacts and the outcomes, and so we encourage you to keep them as a regular part of your engagement process. next slide please.

Speaker 3 00:12:29 Alright, so let's do a quick 101 on what is HMIS or the Homeless Management Information System? it is a local information technology system used to collect client level data and data on the provision of housing services to individuals and families at risk of experiencing homelessness. So, think of it as the local client level database tracking engagement with your housing and service system. Who owns the HMIS? Each continuum of care is required to own, a software license with an HMIS or be engaged in an HMIS solution that covers their geography. So, at the end of the day, ownership rests with

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

the CoC. and again, that could be in the form of a statewide, or a regional HMIS, or it could be in the form of a singular HMIS tie just to the one COC. does beg the question. What's HUD's role in HMIS if it is owned by the CoC?

Speaker 3 00:13:33 HUD establishes the data and technical standards. We just went live with the most recent standards, which is, always fun, always causes a transition. And so, that's what we're using now. but that's, we control the data standards. That's the what you need to collect. We also provide technical assistance or technical guidance around privacy, data quality security governance, et cetera. So that's, that's our core role is to set some baseline work with federal partners in doing so, and then help you to at least achieve that and move forward with, with other aspects of your HMIS. We answer lots of questions, provide lots of technical assistance around it. Next slide please.

Speaker 3 00:14:20 Alright, so what's a comparable database? comparable database is, if we actually use the full concept, it's a database that is comparable to an HMIS. That is what it is comparable to. It's comparable in data collection and functionality. So, it should have all of the same data elements and it should have all of the privacy and security protections placed throughout it. The core difference is that the comparable database needs to be separate from HMIS by law. It has to be separate from HMIS so that the data from survivors of domestic violence in particular, when served in a specific project dedicated to survivors is not shared across the whole system. So, the main function is to provide an extra layer of confidentiality and avoid data sharing. actually, not avoid it, it actually prohibits it in any form of client level data sharing.

Speaker 3 00:15:24 So who uses the comparable database? It's primarily victim service providers, but it could be other organizations that are prohibited, by VAWA from using the HMIS. So VAWA is the Violence Against Women Act. that's our core set of users. If you are uncertain as to whether or not you should be using a comparable database, I linked to a resource that's really important. This is something we worked on with our other federal partners, including those who get funded or those who provide funding through the Department of Justice as well as Health and Human Services. they have a special, program as well. So, we worked with them, and this is a great way for you to gauge whether you should be using a comparable database. Throughout this presentation, I'm going to talk about HMIS. Everything I'm going to share about HMIS applies to the comparable database, except when it comes to sharing anything with client level data, which we're not actually going to cover today. So, all of this that I'm sharing will be applicable to you as a comparable database, owner and operator. Next slide please.

Speaker 3 00:16:38 Alright. I'm hoping that all of you have already looked at this resource on setting up your HMIS projects. We have the goal of not disrupting what you're doing normally for project setup. So, if you have a permanent supportive housing project, and you currently have other permanent supportive housing projects funded through perhaps a continuum of care program, your data setup is the same. We want it to be the same as much as possible. So, we have the project setup guidance, it's linked here. We'll provide a link again at the end of this presentation. It's really important. Here's the thing, if you are a recipient and you are wondering, what about me? Am I supposed to be setting this up? I would actually start by having a conversation with your HMIS system administrator. They are usually the ones to do the project setup in HMIS, and then you and your staff will then go in and do the project, or the day-to-day data collection at the client level.

Speaker 3 00:17:38 But, but if you haven't set up a project yet, have that conversation with your HMIS admin, they should be doing that for you. It is really critical you get that setup done right up front.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Trying to fix errors and project setup is a nightmare. So that's, again, your sys admin should help you be able to get there or sometimes referred to as your HMIS lead. You also need to make a decision about whether or not you're going to create a new project or expand data collection for an existing project. You have a choice as to which one is better in your circumstance, so you can make the decision locally. I will say that a lot of people are interested in what's happening in the, your projects. There is a lot of value to having them separate, because people will want to know specifically what did this funding stream do for you? So, make that decision carefully if you're going to do something that is, just adding onto an existing project, but it is allowable, we want you at the CoC level, to work with recipients and have that conversation and again, do the thing that makes the most sense to you and is least disruptive to your program, but allow you to understand the, effectiveness of your program. next slide please.

Speaker 3 00:18:56 Alright, most people are really just curious about reporting. So, I have two slides on reporting. I think the most important thing for you to know is this is not your only session on reporting. We will have a separate session on, reporting your data in sage. We'll go through it with screenshots, we'll provide you with a guidebook. All of that is still in the works and there are not completed yet. we anticipate having those webinars sometime by the end of November, which again will include the guidebook. You'll be able to see the unique questions. In terms of client level data, it is the same as your current client level data collection, as, again, the CoC program. So, one exception is if you are seeking to pay for short-term emergency lodging because you are in a rural area, you will have to set up a project for that, an emergency shelter project, in HMIS.

Speaker 3 00:19:55 And when you do your reporting, there's actually not a, that's something you'll essentially fund as a line item, and it may be part of your permanent supportive housing grant or your rapid rehousing grant. So, you'll upload this data from your emergency shelter project in HMIS, along with your rapid rehousing project or whatever your project is. So that's the key. know that this is not the, not the end all be all on reporting. You'll get much more. So, what should you know? Now the recipient is responsible for reporting. That's information number one, really, really important. Many of you are used to ESG-CV where the HMIS lead did a ton of the work in terms of reporting. That will not be the case. This will be a much more like how it is in the CoC program where recipients do their own reporting.

Speaker 3 00:20:44 That doesn't mean that you shouldn't get the assistance of your HMIS lead. It just means you bear the primary responsibility. The recipients will report quarterly. so that quarterly construct will actually begin as soon as you start your project. So, you may have started already, let's say you started in October. We will open up the first round of reporting we're anticipating in January. So, you'll report on all activity up to December 31st in that first report. And then in all subsequent quarters, we'll actually do a cumulative report every single time. So, you won't do a cumulative plus a quarterly, you'll actually just do a cumulative report. So, that's really important. If you start on January 3rd, you will not start your reporting then until the next cycle, which will be beginning on April 1st. and you'll include your, all of your information from that first quarter.

Speaker 3 00:21:47 And then from there on, you'll report quarterly, every fourth quarter, which essentially will be every year or every 12 months for you. You will have a special section that will include your financial information, but again, we'll only make you do that annually. So, the rest of the quarters, you're essentially going to do client level data uploads. So, it's aggregate data, sorry, aggregate data, but on your client served. And you'll provide some data on narratives. So, I'll give you an example. We are going to ask about your rapid rehousing models, what things you're doing uniquely for rapid rehousing.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

You'll provide a narrative. If you don't change your model, you won't actually need to update it each round. You can keep what's there. but if you make a change, we ask that you make that up. again, I will provide that information in our reporting guidance, our guidebook that will come later, not available at this time.

Speaker 3 00:22:45 but hopefully in the coming weeks you'll have that, and you'll know exactly what these extra narratives are going to be. Again, there will not be extra client data collection or reporting that will look a lot like you do now, like it does Now for CoC. It is important to note that if you have an HMIS grant, a coordinated entry grant, a CoC planning grant, or a UFA cost grant, you will only report annually on that. We will not have you report on that every quarter because you're not serving clients in the same way. So, we're not going to make you do that every quarter. We will do reporting basically on the fiscal quarters as I described earlier. so when you start your project, you'll again start your reporting in the next fiscal quarter and do that until the end, end of your reporting. So, recipients will have 30 days to submit similar to ESG-CV. So, reporting for this next cycle will begin January 1st. We'll close January 30th. You'll report on all activity that happened really from the start of the grant if you began a grant prior to January 1st. next slide please.

Speaker 3 00:23:59 Alright, you will be reporting in sage. So many of you have already, again, received other grants, through HUD, either through ESG or through CoC. And you'll continue to use that same reporting repository. Sage, if you haven't reported there, great, we have a link there. many people have found it to be convenient. So, we're looking forward to, again, providing more training. You'll see what that system looks like, how you log in, we'll give you all those details, and we'll do that in the reporting, in the webinar in November. again, you'll report aggregate data on clients same as continuum of care, as I mentioned before, and I mentioned the training already. I, yes, I see Sarah had that question around what's going to be reported annually, and that was answered by Brett, but I'll say it one more time. So, the things that will not have a quarterly reporting requirements include HMIS, the SSO, coordinated entry grants, CoC planning, and the UFA cost grants for the few UFAs who got funding, they will only report annually for those grant types. Again, that will be in the guidebooks. You don't have to write that down per se. You'll have access to that information. Next slide please.

Speaker 3 00:25:18 Alright, so another common question is what is this going to do to other reports, right? You have the housing inventory, the PIT counts system performance, Eva, these projects will be included based on their project type. So, the housing inventory count essentially includes everything. You'll report it all there, your point in time count, anything that is tied to a shelter-based project will be included. So, if you've got a joint transitional housing rapid rehousing project, your TH portion will be included, included in the PIT count, and people in the transitional housing project on the night of the count will be included in your PIT count system performance measures again, and, and LSA all driven by your project type. So, if you have permanent supportive housing and there's a measure that requires data on permanent supportive housing, those projects will be included. Our whole goal is just to see, like, this is all part of your larger homeless system, so it absolutely impacts these other things that we're trying to understand. So, we want to see reporting on it so we can get a sense of the bigger picture of what is going on in your system. let's go to the next slide please.

Speaker 3 00:26:31 Alright, so another set of questions we get are what about the interaction of these projects or even this effort with other partners? Stability vouchers? That's a really common question we get. So, stability vouchers, PHAs will continue to report through the normal process for the

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

purposes of their administrative requirements. So, their annual reports will be through their local pick system. Essentially what they're doing normally through the PHAs reporting process. However, we are requiring, you to include what you can do with stability vouchers in HMIS. We treat it like VASH. So, this is an important part of your system. So, we are expecting that you have representation of your stability vouchers in your HMIS for the purposes of HMIS bed coverage. I know that's not terribly popular, but again, this is really, a really important source and one that's important enough that we, we want you to do what you can to get the data there and we'll look at it in terms of HMIS bed coverage.

Speaker 3 00:27:38 we appreciate all of the lessons learned over the last couple years. There's been a lot of great interest in, in EHV, and we learned a lot from that. and now as we have these projects, which includes, again, stability vouchers and the ones you're operating through, this NOFO people are really excited to learn from you. So, a lot of people are asking what's happening. We strongly encourage you to do what you can to share lessons learned, share the data. people will be very interested in your successes and, and potential failures. failures could happen as part of this process. As long as you're learning, engaging people with lived expertise, doing your best, we think no matter what, you'll actually be able to be in a better place when this is all over. And we hope to, to learn from that.

Speaker 3 00:28:28 you should be carefully discussing now in your systems, in your CoC's what's, what you plan on sharing and with whom you should be setting up any sort of privacy updates that are needed. We'll talk about the privacy notice in a little bit, but just recognize that that privacy is really, really important. and you're going to have to set that up early on. Just a second. I'm going to pause for a second. Alright, sorry, I'm in a very public location. Alright, finally, think about how you can share data with other partners. So, partners like your healthcare partners, other folks that you are working with to make a dent and your unsheltered homeless, situation. Work with them as much as possible. Again, that's going to require discussion around privacy, and around what you can and should share. So, we strongly encourage you to have those conversations. next slide please.

Speaker 3 00:29:28 Alright, I've mentioned privacy. I wanted to make sure that you guys are aware of what we think of your big considerations should be. the coordinated entry. Notice the language around privacy there is really key. And I would actually look at these three core bullets. They're the big things that really drive privacy. As of right now, this ties closely into our privacy notice as well. So, written policies and procedures for obtaining consent to share and store client data really key, they're a must. You have to be able to have all those things well documented. client choice is the key, right? We must be able to ensure client choice, about how their data is shared, is engaged. and then clients cannot be denied housing or services for not providing data or for not consenting to share. I think everyone knows those things.

Speaker 3 00:30:26 it amazes me how fundamental it is, and yet we have so many questions around that, especially that last one. Do not deny people for saying they don't want to share their data. They still should have full access to services, and be able to get the assistance that they need. one other thing to note with all of this is CUCs need to make sure that they have a grievance policy in place in case there's a violation of privacy or confidentiality. So, if you're a recipient right now, you may kind of say, well, what's my role in this? The reality is most of this rests with the CoC and HMIS lead. Where you may find an issue is where a violation occurs. there may be a violation of sharing that happens in your project. and the question will come, well, what, what options do I have to appeal what occurred?

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 3 00:31:15 Or to, deal with a grievance? That's where you'll engage in this policy that, again, your COC or HMIS lead should develop, CoC's and HMIS leads in particular, you should be evaluating your privacy notices. Again, hopefully you're going to be considering what is appropriate to share. We strongly encourage you to have those conversations. Now, hopefully you've had them. And for more information on implementing effective privacy practices, we refer you to the coordinated entry management and data guide. really good on privacy. probably has the most details that we put out in a long time. So that's a great place to start. next slide please.

Speaker 3 00:32:01 Alright, I'm kind of wrapping up the data section with regard to HMIS. This is a core part of that. You should be looking at your data regularly, definitely at the COC level, hopefully at the project level. We want everyone to have access to it. We want you to kind of see what's going on. see what progress is made. See, when progress is not being made, it's possible that, again, things are slower than you thought you may have to make adjustments. use the data to help inform both qualitative as well as quantitative. So, engage your people with lived expertise. help them or have them help you as you're looking at that data to ask the right questions. Like, what are we missing? What's the story behind this? Why are we seeing these outcomes? Why are we not seeing outcomes? Where we would expect to see them so strongly encourage you to engage them as well as your frontline staff, our street outreach workers, amazing, coordinated entry frontline staff.

Speaker 3 00:33:02 We just have amazing staff in this field. Sure, they have a lot to offer, but we would love, that their voice be heard. They have great insights, so, so many, so many folks who can help us understand what is happening. Alright, you may use other resources as well to help you visualize what's going on. Sella P and eLearn partially intended to help you get a data quality visualization needs. and you'll have other needs as you go. So, engage your tools, see what you have locally. Many CEOs are already way, way ahead of the curve in putting out visualizations and helping inform the public. We are excited to see that and happy to answer questions about it. one more slide for me. Go to the next slide, please. When you're doing this evaluation of dynamic change that may need to occur, you may find that you might need to make some changes to actual grants that you have. You may need some amendments. So just a reminder that you should engage your field office and ask for their input on how to make changes, what amendments are needed. we're always happy to answer some questions as well through the special NOFO inbox. But again, if you're talking about grant changes, a good place to start is your field office. thanks for enduring kind of a long spiel there. I know we'll get to questions at the end. for now, I'm going to turn the time over to Taylor.

Speaker 3 00:34:36 next slide please.

Speaker 4 00:34:40 Alright. Hey everybody, this is Taylor Kylie from the Chicago Field Office. Let's talk about eLOCCS. This is the system that you're going to draw down and reimburse your bank accounts for eligible and incurred costs in the grant. When you're attempting to do anything in Secure Systems or eLOCCS, it's crucial that you contact your HUD Field rep. The system forms, links, guides are always changing. And to make sure you're completing the correct forms and accurately and completely your HUD rep and there, the HUD financial team at your field office will keep you updated on everything you need to know. Additionally, everything we'll go through in the next slides come from the eLOCCS quick reference guide URL, which is going to be, later in the slide deck, but we can also put it in the chat in a little bit. and let's go ahead and move on to the next slide.



Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 4 00:35:38 First and foremost, it's important to understand that secure systems is not the same as eLOCCS. eLOCCS is embedded within the URL of Secure Systems, but you can be registered in secure systems without having eLOCCS access, but not the reverse. So, this slide is kind of your overview slide. That includes the general steps of getting into eLOCCS, which is that end system where you're going to be able to draw down funds from your CoC grant. And probably the most important place to start is an internal planning stage. Your organization needs to determine who the end sign off reviewer person is for drawdown documentation, as well as the user or users who will complete the actual drawdowns in the eLOCCS system. And then the coordinator or that end sign off person will ensure that the business is registered in the secure systems via their tax ID number.

Speaker 4 00:36:32 and if you're new to federal funding, and you're probably not registered in this system and you need to register the business before you move on to anything else, once your business is registered in Secure Systems, the coordinator or that end, final reviewer needs to register in Secure Systems first and then the user can register. Bio Secure Systems is essentially a security check to ensuring that your information locked down for use of any of the federal financial systems that you're registering for. So, once you receive your secure systems registration, also called the MID, the coordinator assigns themselves some roles in the system, and the coordinator will then also assign the user its roles. After all that's done, it could take anywhere between a couple weeks to a couple months, depending on a variety of factors. the user will work with the approving official to complete the eLOCCS access form for their MID, and then that completed notarized form for the user is emailed to the HUD field rep. so once this form has been processed, the user will receive an email that they have eLOCCS access and should log in within the timeframe listed in the email. The final step is completing that banking information. but let's go ahead and just talk about each of these steps more specifically. And next slide.

Speaker 4 00:37:55 As you all know, and as you're all probably already doing, you're working in financial assistance, you're working in twos at, at a minimum. So, the coordinator role is the final reviewer that will be signing off everything charged to the grant in this particular voucher I'm drawing down on was eligible. Eligible and allowable. the coordinator approving officials, someone who's higher in the org chart than the users who complete the drawdowns. You have to determine what's best for your organization. I've seen this in a lot of different ways. Sometimes it's the, the organization's board chair is the final sign off and the CEO is the drawdown person, or the CEO is the final sign off, and the accounting folks are the drawdown people. Whatever way you plan this, the coordinator must be above the users in the agency's org chart.

Speaker 4 00:38:42 and HUD may request verification of this via, the agency's org chart. As far as users go, you're going to be thinking about having multiple users in both systems. So, secure systems, again, is like a security check. And then you also want to make sure that with staff turnover, you have multiple users that can be able to access the drawdown function at any given time. Whoever the coordinator or approving official is won't necessarily have drawdown access. So, you need to make sure you have at least two at any given time. Next slide.

Speaker 4 00:39:22 Alright. As I mentioned in the first slide, the secure systems process and registering in it is basically a security check to be able to get into eLOCCS. It's not the same as having eLOCCS access. Once you register in Secure Systems, your MID will come via post mail snail mail, for both the coordinator and the user. but once the coordinator already has their MID via the post mail, the user doesn't have to wait for their mailer after they register. Once the user registers, the coordinator and the

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

user will receive an email indicating that the MID has been created and processed, and then the coordinator knows that at that point they can log into Secure Systems and look up the user's MID for them. then you don't have to wait for, USPS, when both the coordinator and user are registering and secure systems, you really want to make sure the correct application type radio button is selected.

Speaker 4 00:40:17 so that's the gray circled area in the screenshot here. You also want to make sure you're using the correct registration links. So, at the top I've circled multifamily. There's a couple different secure systems, and I recently had an experience with that, and it took a very long time to figure out what went wrong. So, make sure you are using the Secure Systems link for multifamily, not PHA, also in Secure Systems. And, before you process new eLOCCS user forms, the coordinator must assign roles per the guidebook link to in this slide. Also, will be put in the chat and in other slides. This is a step that's often missed, especially for the coordinator assigning themselves their own roles. if the coordinator sees issues with their ability to assign roles to their user, there's, there might be something wrong with their own assignments, and so they should go back review page 21 of the registration guide to ensure that they get, their own roles assigned correctly. Next slide.

Speaker 4 00:41:21 So once you've moved through registering assigning roles and secure systems, we finally get to completing the eLOCCS form. So before starting any form, as I mentioned, you always want to check with your HUD field rep or HUD Financial Analyst to ensure you have the most up-to-date version of the form. It was actually recently updated last month, and the internal office that we submit these forms will reject older versions and make you start over. These forms are notarized, so hence the start over part. It's a bit of work. So checking in with your hood field rep or hood financial analyst ahead of time will prevent a lot of headache, hopefully down the road. another common missed item is page two of this form, in the program area, for you all in the COC with the SNOFO grants, the program area is SNAP and there is no S at the end of SNAP.

Speaker 4 00:42:12 do not include the SS and IT, or it will get rejected and you'll have to redo the form. there's a lot of nitpicky things because this is a financial system, we want to make sure that we're doing it correctly according to the guidance that we have that we've linked to here. So just make sure you're checking in with your HUD rep because they will ensure that you're, they'll check over everything before they submit it to that office. A reminder that your MID that you'll put onto the eLOCCS form and submit via email to your HUD rep is assigned based on your social security number. So, when you're registering and secure systems for your own MID, you're putting in your social security number. This is considered sensitive information should be emailed with encryption. Next slide.

Speaker 4 00:42:58 Once you have your MID, your roles are set up correctly. You can get into eLOCCS. You're a, you're going to be, just completing the banking form and that's the SSF 1199 direct deposit signup form that's linked to here. But again, always check with your HUD field rep or your HUD financial analyst to ensure you have the most up-to-date version of the form. There are instructions in the links that we provided, about what to write in each block, which is really nice. but for you all, I want just to say specifically for the COC and Snowfall program, block F should say SNAP, no S's. and I from here, I'm going to hand it off to Carrie to talk about planning for your draws in LOCCS.

Speaker 5 00:43:43 You are in eLOCCS, you've got your banking information in eLOCCS, you're ready to do your first draw, but wait, there's still some planning left. We need the next slide. I'm going to go kind of bottom up on this one. So, you need to know who's going to be involved in collecting backup documentation for your drawing. And to answer that, you probably need to answer what kind of

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

documentation you need for this. So, what do you need to show that the costs are eligible? Eligible, allowable. This is your source documentation such as invoices, time sheets, and payroll. Once you know that, then you're going to know who you need to collect this information from in your organization. Also, where are you going to store the documentation so that it's easily produced for HUD when we come out to monitor? This is something to think about right now, right at the beginning.

Speaker 5 00:44:34 you're probably going to want to put it in your policies and procedures as well. HUD leaves this up to you, but I've monitored where the voucher and backup documentation is handed to me as a packet, and I go on with my review. I've also monitored where the person is me, the voucher, and then gone to several filing cabinets and dug through files and picked things here and picked things there. Those people were much more stressed than the person who had already gathered it all together when they did the draw. Kept it together and handed it to me during monitoring. So that's something to think about and probably develop your policy and procedure now on how you're going to store that information. There are some minimum draw requirements you have to draw down at least quarterly if you have subrecipients. Once they give you a bill that you've approved and you can pay, you have, no more than 45 days to go ahead and pay them.

Speaker 5 00:45:27 These are both dictated by 24 CFR 578.85(c). Also, draws are expected to be done on a reimbursement basis. This means that you are drawing funds down from HUD that you've already spent. So, we don't tend to forward funds to you and have you spent those like maybe CDBG may. This is something you want to do on a reimbursement basis. If there are cashflow issues, definitely reach out to your HUD rep because those could become bigger issues. You have 90 days from the end of your grant period to draw down any funds from that grant period. This is very important. The costs have to be incurred during your grant period in order to draw them down at the end in that 90 days. Also, it's 90 days, it's not three months. So, if your grant ends on June 30th, then you have until September 28th to draw.

Speaker 5 00:46:24 I have seen where people wait till the 29th or 30th thinking they have three months and now they're locked out of the system. So, make sure you're doing that. Also, make sure if your grant ends on June 30th, that you are not paying rent on July 1st for July with those same funds that's coming from your next year's grant. And if it's all set up, you can draw those, but you make sure you're drawing from the correct grant. Also, just a reminder that you cannot draw more from your budget line item than you have in the balance when you draw. we see this pretty often in the field office where a recipient will overdraw the budget line item. And what happens is that voucher comes to us in the field office for review and then your HUD rep has to reject the voucher. Then you would have to re-put and, well, you would put in a new voucher, you wouldn't revise it, but you would put in a new voucher and draw that down.

Speaker 5 00:47:12 So please pay attention to the available drawdown balance column. I would, and Taylor's going to go over some screenshots. I was kind of shocked because our system at HUD looks different than your system, and so I didn't realize that there's actually a column that tells you, and it's right to the left of where you're putting in your amounts. It tells you how much you have left in that balance for that budget line item. So, make sure you're looking at that before you're typing in the amount that will save you all kinds of trouble. Taylor, I'm going to send it back to you and the next slide please.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 4 00:47:48 Thanks Carrie. Awesome segue. here are the golden screenshots. This actually came from one of my grantees in Chicago, so thank you very much. Once you're in the eLOCCS system, we just have a few screenshots here that help the user navigate completing, their first draw. So, you'll know you have eLOCCS access when you first sign into Secure Systems and you see a link that says Line of credit control system eLOCCS available to you. So, in the first screenshot on your left, you see it circled line of credit control system eLOCCS. If you do not see that link when you sign into Secure Systems, you do not have eLOCCS access something went wrong, go back to your HUD rep, figure out what you need to do to fix that. Once you click on that link, you'll be taken to a locked authorization screen to tell you which programs you have access to draw down upon. And as we know our purposes, we're looking at the SNAP program. So, we're going to click on the word SNAP or the acronym SNAP. click on that link. It'll bring you to the line of credit control systems. And you are now in eLOCCS. That is where you're going to start the voucher entry. And you're going to click on a link payment voucher entry. Next slide.

Speaker 4 00:49:07 So it's not pictured here, but if you have multiple grants or even just one, it'll ask you to select which grant you want. So, you click on the box and hit submit. It'll bring you to the page that you see here on your left. It was hard to fit on the slide, but I just wanted to be able to provide it. You can look at it later, or see it on your own in your own view. But it includes the budget line items of the grant that you've selected with the drawdown balance, the authorized amount that you were awarded, and a field to manipulate or indicate how much you want to draw down from each budget line item of that grant. The user will enter the amount they wish to draw down, from each budget line item and hit submit.

Speaker 4 00:49:45 And then the next page over on the right, hopefully you will see at the bottom a payment request was approved with a blank space for your final reviewer or approving official to sign and date that they also reviewed the voucher documentation that the user or your team put together. And the final reviewer is again, signing off that all costs drawn down in this particular voucher were eligible, eligible and allowable. One thing about this, we usually see it as a, a top sheet to, the voucher, backup documentation to the receipts. and it is, something that you just have to print screen. So, it's kind of not really that user friendly as far as technology goes, but it is something that we are going to look for. We're going to look for that approving official when we come out to monitor that their signature is on the voucher that they, we worked in at least twos that it wasn't just one person handling everything. next slide.

Speaker 4 00:50:44 So some tips and reminders. secure systems when you're getting your MID, it's managed by an office called REAC. I actually don't know what REAC stands for and maybe one of our financial analysts on the call can put it in the chat, but it won't be on the test. this, this office requires the actual user or coordinator to call to get assistance and that phone number is on, in the Getting Started guide, it's also in, all the other links we've provided. Remember Secure Systems is that security check to get into eLOCCS, which is that financial system. and so, it requires a coordinator or user to input their social security number to get the MID. Thus, if you have any issues with security systems, they're going to verify based on your social security number. So, you have to call directly verify your own social security number.

Speaker 4 00:51:32 We can't do that for you. eLOCCS, however, is managed by what we call, the Fort Worth Accounting Center. Again, not on the test, but they do this internal center requires that HUD Financial staff are the only ones to be communicating with them on behalf of the grantee and HUD staff.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Again, really important to make sure if you were even thinking about starting this process, changing anything, that you're in communication with your HUD field rep who can connect you with the HUD financial staff in that office. And all this information I've gone over today, along with plenty of other functions that you can go through, including, reinstating users that get locked out, changing bank accounts, changing coordinators, changing approving officials is all here in the Getting Started guide. This Getting Started guide has links to instructions for every kind of function you can imagine.

Speaker 4 00:52:21 it's a great place to get started, pun intended, and you choose your own adventure from there. The final reminder tip, I would make sure you read the emails that you get from the system regarding your MID, access or re-pupping your users. Those emails will generally provide a timeline that you absolutely must stick to, otherwise you will get locked out. For example, I think they give you 10 days to log into secure systems for the first time, or it might be eLOCCS. Otherwise, you get locked out and have to call React to get reinstated and then do a new eLOCCS form. And you have trouble with any of this process or opening any of the System Alert emails, which is a known problem. You can also reach out to your hub rep to troubleshoot that further. That's all I have, and I think I'm passing it back over to Marlisa.

Speaker 1 00:53:15 Thank you, Taylor. Next slide please. Before we turn back to our Q&A session, we, I just want to flag some, HMIS resources as well as eLOCCS and secure system res related resources. So, we do have the HMIS resources linked here, so they'll be available to you once we post these slides on the website. And I believe Brett, and Ebony linked to the slide deck a few times as well. So just check the chat for access to those. And then for eLOCCS and Secure System Resources, please check out the eLOCCS Getting Started Guide as well as the resources page. But as Taylor pointed out multiple times, you really do need to be working hand in hand with your field office to get your access to eLOCCS, set up and functional. So please use these resources, by all means read them, but also be in close contact with your field office to make sure that you're getting the access that you need and you're able to troubleshoot any problems that you're having. All right, next slide please. So please continue to post questions in the chat. And I am going to start with some questions related to eLOCCS. So, Taylor and Carrie are in the hot seats and there's some good ones. So first for Taylor, who can we contact to do some problem solving for a staff person who's not received their secure system ID via email?

Speaker 4 00:55:01 So I think the first thing would be to, if this, they didn't receive anything via email. If you already have an established coordinator in secure systems, they can actually go in or anyone actually that has secure systems can usually go in and look up someone's MID using the user maintenance function in secure systems. So, if that's the case, that's an easy fix. If not, obviously your best bet is to go to your HUD rep to figure out what went wrong. again, the Secure systems MID folks are the, react group and your HUD field rep can give you that phone number to call or, it's in the quick reference guide link if you scroll to the bottom.

Speaker 1 00:55:47 Great. And then also Taylor, how difficult is it to change secure system roles? So, if I've already registered in SNAPS as a coordinator, but should have re-registered as a user,

Speaker 4 00:56:04 It's, it's, it's not impossible. to, we can definitely look through, I think you'd notify your, your HUD rep. they'll navigate that guide, the registration guide with you, to make sure that you follow the process to a T and then, you can get that transferred. I can't recall if it's top of my head if it's a, if it's a letter or if it's

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 5 00:56:22 Something else. So just make sure you reach out to your HUD rep.

Speaker 1 00:56:27 Great. Alright, so Carrie, regarding draws is the requirement or can recipients submit drawdown requests more than once per quarter, ideally monthly?

Speaker 5 00:56:45 absolutely they can, draw down more often, but they have to draw down at least once per quarter. So, if you want to do it monthly, that's fine.

Speaker 1 00:56:54 And then related to that Carrie for, eLOCCS drawdowns, are grantees required to submit a first draw within the grants first operating month?

Speaker 5 00:57:05 No, it's within the first operating quarter.

Speaker 1 00:57:11 Thank you. Alright, now I think this could, I, I will actually open it up to either Carrie or Ebony or Brett flagging this one for you. Can you clarify on drawdowns, is it the CoC program spent or like incurred or already paid and reimbursed? So just trying to pinpoint what that means in terms of the, the special NOFO grants. Carrie, do you want to take that one?

Speaker 5 00:57:54 Okay. I was waiting to see if someone else was taking that. it, it would be the money spent. So, I mean you're going to incur rent on the first, but you need to have paid that rent, I guess is the example, the best example I can come up with before you draw those funds down.

Speaker 2 00:58:15 I can add to that there are a few instances where you can draw down in advance of incurring the cost. There are very, very specific requirements that you have to meet in the regulations to be able to do that. So, in the example that Carrie gave, if rent is due on the first, you could draw funds for rent on the 30th so that you don't have to front the costs from your own line of credit and then reimburse yourself. But there are certain, like I said, there are certain requirements in the regulation that your financial systems need to meet. and that the draw itself needs to meet, like you're not drawing down on January 30th for rent you're paying in March. That's too far away, but there are some instances where you can do that.

Speaker 1 00:59:02 Great. Tanya let us know if, if, there was a nuance to that question that we didn't fully hit on. Sarah is asking, do the email addresses for SNAPS and eLOCCS need to match? I notice one requires a name in the email address and one does not. Taylor, can you answer that one?

Speaker 4 00:59:23 I'm going to say yes, and it came, that reminded me actually of another, instance that came up where, it cannot be a Gmail account, or a Yahoo has to be the organization's name or there's going to be some additional documentation needed by that office. So,

Speaker 1 00:59:44 Okay. And Taylor another question about the instructions. Let us know if, if we need to punt on this one, but, the instructions that Chelsea received said that they both have to be full-time employees. So, if an, an administrative administrator, for example, is part-time, should, should Chelsea go ahead and do the board chair c e o duo?

Speaker 4 01:00:11 Yeah, I would definitely check in with the latest guidance that you've received. When I did see that duo with the board chair, it was actually done about 15 years ago and or whenever eLOCCS first started. And I noticed they did have some pushback because you could tell maybe that maybe wasn't necessarily the guidance now. So, I would definitely follow whatever guidance you've been given, by your head. Rob,

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 1 01:00:38 Thank you Taylor. Okay. We've got a couple of questions for you, William. just wanted to highlight one question about reporting on participant outcomes when they don't consent to share. So how, how does a, how does a recipient go about that reporting on someone reporting on, program participant outcomes if, if they do not provide consent, and then how to ensure that, that they're not receiving duplicate services from other awardees?

Speaker 3 01:01:16 Yeah, great question. I put a written response in the chat that's kind of long, so you can refer to that, but I want to, I want to talk about that one anyways. So, consent means a lot of things in this case I'm going to refer to it, meaning two different things. there is consented to provide the information in the first place at the data collection point. That is a case manager asks the question, what is your date of birth? And the client has the ability to say, I prefer not to answer that question. at that point, the case manager should move to the next question, right? Then there's a list of things that have to be collected, which your HMIS system administrator should help you understand. At that point, you're not going to have any information that they don't provide you with in the data collection process.

Speaker 3 01:02:12 I did put a note in there that it is really critical that those questions get asked. We do not want case managers or anybody answering on behalf of clients or assuming how an answer should be provided. That is not up to you. That is always up to the client, and it is their choice. So please do not skip that step. but if they choose not to answer, you just put, prefers not to answer and then move on. That's the first part of consent to share. and that's really consent around data collection. The, the idea of consent to share is if they provide that information, they may then say they don't consent for the data to be shared with others. That's really in reference to their PII, right, their personally identifiable information. That means that if you are working with another provider in the area, you cannot share the data that you collected in HMIS.

Speaker 3 01:03:15 Even if the other provider is also using HMIS, they have to go and collect that separately. We usually want to avoid that and it's good to explain that to clients too, that we want to avoid, duplicate data entry. However, it does not prevent you from using their data in the aggregate for reporting purposes or even for your local analysis on progress made. You can use the identified data in the aggregate for the purposes of all of those other things. So that is not a violation of their denial of consent to share, but that, that consent is all around PII. So that's, that's the key distinction that I want to make sure people are understanding, as they move forward. because it's a great question. Marlisa did I, did I miss a part of that? I feel like there was a one more part that I might not have addressed.

Speaker 1 01:04:12 I think it's the performance piece. how to, how to ensure that they're not receiving duplicate services from other HUD awardees.

Speaker 3 01:04:24 That's perfect. So, this is where, again, having a frank conversation with the client about what this means is really important. We find that most who are informed around how the data's collected and used actually want to consent to share it because they want a variety of services. So very rarely when that information is provided, do we actually run into the situation. The reality is that you have to do your best at the COC level and at the project level to avoid duplication of services. If there's no consent to share that, it is a possibility that that will happen once in a while. This is probably most likely when you're talking about survivors of domestic violence who also receive a service, from another project type that's not from a, a victim service provider. So, it is possible we want to minimize it, you want to minimize it, the client usually wants it minimized too because it's just more hassle for them to

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

have to work through, every different agency and each different set of data collection requirements. So, I love that question. It's really good.

Speaker 1 01:05:31 Okay. This, this shifts gears a little bit William, but how often does the information need to be updated in HMIS for PHA data to be considered participating? So, do the stability voucher need to be included separately on the HIC if they're part of the PSH project? That's already on the HIC. So, two slightly different questions.

Speaker 3 01:05:54 Yes. So, this all gets at what HMIS participation means. HMIS participation means that the data for the project is submitted to the COC at least annually, and that should be the data about the project throughout the year. But that may happen at different increments of, obviously there are a lot of direct HMIS users. They're essentially updating all the time. there are other, folks that we work with that tend to not want to use HMIS. Maybe they're using another system. PHAs are a perfect example. and our partners at the VAWA, they do a lot with us. They do a lot of great stuff. They also have different reporting requirements. They can provide that data one time in the year, but it should cover those that were served throughout the year. So, the key there is less about the number of interactions throughout the year, but it's more about did you get the data about people served in the program through the year? We measure participation during the HI process, right? So you'll tell us are HMIS participating or not? And again, you'll harken back to this question of, hey, did they give me the data on people that they serve throughout the year, regardless of whether that happened again throughout the year or in one increment or maybe on a regular feed.

Speaker 1 01:07:21 Got it. Okay. Back to, client client's choosing or, or not choosing to share. Can you clarify if a, if a client chooses not to share on a specific data element, for example date of birth, will that be counted object on the a p r as far as data quality goes?

Speaker 3 01:07:44 Hmm, that's a great question. as of right now, it may, we're looking at, so we updated the data standards. One of the updates was we used to actually have a field that says client refused. That actually wasn't a very friendly way to talk about it, especially given some of the certain, well, sometimes dangerous circumstances changed it to prefers not to answer. We're working through that piece right now. There is, it's even if it gets counted as something that you didn't collect, there's no penalty against you at this point. So sometimes people say, well, am I going to lose funding for it? Am I going to, it, will there be a finding on my grant because of it? The answer to those questions are no, there will not be. but again, we are evaluating what we want to do in that space just to recognize the sensitivity of that data collection and we still have to balance that with the reality that we still know that some, some folks are actually choosing to answer on behalf of the client. And it tends to be more of a reflection of the data collection process than it is actually client choice. So, trying to balance that is something we're still figuring it out.

Speaker 1 01:08:58 Yeah. Great. All right. Another question for you, William. Going back to Sage quarterly reporting, is there any finance or match data submitted or required to be submitted on a quarterly basis?

Speaker 3 01:09:16 Hmm, good question. No, you'll only have to report on anything related to the finance including match annually. So, you'll do your quarterly, your fourth quarter will include a financial section and you'll answer questions accordingly in there and it'll include similar to the COC a p r, some questions on match.



Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 1 01:09:43 Are we requiring grantees to track and report leverage?

Speaker 3 01:09:49 that's a good question. We are not requiring you to report on it in the APR. So, if you're asking about it with that level of specificity, the answer is no. I may defer to Ebony or Brett with regard to how that will be treated in terms of monitoring because it was tied to a NOFO provision.

Speaker 1 01:10:15 Any additional thoughts, Ebony or Brett? Yep.

Speaker 2 01:10:18 So you're going to want to keep records of this in your file, in your case files. obviously a lot of your leveraging commitments were also helping you make your project feasible, right? They were healthcare commitments, or they were housing commitments. And so, if you are unable to meet those healthcare housing commitments, your project isn't going to be whole. So, I will keep notes of them in your files and if something happens to those commitments, reach out to us and let us know.

Speaker 1 01:10:50 Alright, so, jumping back again to client, client access to data. So, or client sharing of data. What if the data requirement that's not being shared by the client is critical to program eligibility? So, in other words, how to enroll them if they don't provide that data yet still provide the services. So, William, can you start with an answer and then Brett, Ebony, chime in if you have anything to add.

Speaker 3 01:11:26 Yeah, I mean the reality is it doesn't change the data answer. You can't force them. But this does go back to the reality that this is where the role of case managers is so key. let's take a project that may be targeting, those with a severe mental illness. and that is a requirement for whatever you're doing in your project. Maybe because of another funding source, you could ask them the question and then they may say, no, they have every right to do that. This is where the case manager would say, okay, we just want to let you know that your responses to these questions may give you additional access to it, other options for housing. but you can reinforce it still remains their choice. but that information often helps clients to understand, oh, they're not just trying to collect my stuff and then do whatever they're going to do with it. that's not tied to me. No, all of that data collection is tied to our ability to better serve those who we have in front of us. And so, helping them understand that makes a big difference.

Speaker 1 01:12:30 Anything to add?

Speaker 2 01:12:31 Yeah, and I would say for purposes of eligibility, like there's a difference between sharing an HMIS and documenting in the case file and for purposes of eligibility, you'll still need to document the information in the case file, so that we can see that they're eligible. And so, you can explain that, right? Like there's HMIS and then there's documenting your eligibility in the case file. Again, it goes back to the role of the case manager and explaining all of these things to clients. and so documenting eligibility in the case file still will need to be done. So

Speaker 3 01:13:08 I want to clarify one thing with that. because actually that's a great point. That still may mean that they said no prefers not to answer for HMIS purposes. The case manager can then explain, you want me to document it for the purposes of eligibility in a, in the case files. So, there is no scenario where we are forcing clients to, to answer the question. They always retain the right to answer the question. So, I just want to be clear that that client choice is never removed from them, but there are consequences for not providing data, but we have against some solutions around that, like using the case file to avoid, touching HMIS per se. so that's a, it's a really good, good point there.

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 1 01:13:56 So John asks, what if there is additional documented evidence of the condition status, but the client denies? So, I'm not sure if I, I think that that may be read a couple of different ways, but any thoughts Brett or Ebony or, or clarifying follow up questions for John?

Speaker 2 01:14:17 Yeah, so I'm reading this as there might be like a hospital record or something or, or I don't know, John, any, any additional information you might have, would be great or let's take it really easily at homeless status. And somebody denies they were staying in in an emergency shelter, but you have an HMIS record of somebody staying in an emergency shelter, then you could use that HMIS record. When it comes to the disabling condition, I think it's going to be really hard to use another entity like a diagnosis in and of itself. because you also need the, the licensed medical professional's statement that it's long continuing, it's expected to be long continuing and, and of indefinite duration. so that would likely be a little more challenging without somebody being willing to see someone and get that certification. A diagnosis in and of itself with the exception of HIV/AIDS, is not sufficient for documenting disability.

Speaker 1 01:15:26 Okay. Alright, so William for the end of the year-end financial report, the fourth quarter is based on the calendar year cycle, not based on the contract start date. Can you confirm that and that the financial data at that time point goes into Sage?

Speaker 3 01:15:48 That's correct. So, this is a little tricky. This is again, where we verge from what we're doing with E S G C V. So, your year, your, so you'll report in your fourth quarter based on, well, you'll report all your financial data based on when your fourth quarter report happens. So, I'll take the example that I saw in the chat of starting a project on 12 one. If you start a project on 12 one, your first report is going to be on January one. You'll have 30 days to submit that. Your fourth report will be at the end of your, so it'll actually go back to your January one the next year. sorry, is that right? Well, let's see if I know how to count four quarters. But, but you'll report on that full year in that last, in your fourth report in the quarter.

Speaker 3 01:16:51 So we'll, so it's not based on like your calendar year. If you start at 12 one, we're not going to make you, report based on up to 12 one, you'll simply report up to 12/31, if, if you're going to report on your financials in your one report period. Does that make sense? I know that's a little complicated. What it really means is your first report is going to have extra stuff in it or it'll be shortened. It depends on when you start, and your last report will definitely be shortened because you probably are not going to be reporting up to the last day that your reporting starts. So, it's okay. We understand the shortened periods and we're not, it's not critical that it be to the date. The critical thing here is that again, that fourth quarter includes what happened in terms of finances across the previous quarters so that we have an annual sense of what occurred from a reporting standpoint. So, sorry, I know that's a little confusing because it's not as clean as a start at 12 one report due, 11/30 and then I report on the year. That would be a little easier in some ways, a little harder than others.

Speaker 1 01:18:05 And just a reminder to you all about the, the special, the special NOFO, mailbox if you have, if you have questions and the more information detail you can provide, the better to, so that we can answer your question as, as best we can. Alright, I'm going to give one more. Oh, and great Brett just posted the email box in, in the chat. And then Alice asks, are the reports available? And I am not sure of the exact reports, but that makes sense to you, William. Yeah,

Date: October 18, 2023

Title: 101823-506380-HUD-Special-WrittenTranscript

Speaker 3 01:18:51 The reports should not be available. Connie, put a note in there. Connie, I don't know what you're seeing to be totally honest because as far as I know, Sage has not developed all of those reports yet, so you really shouldn't be seeing a report. again, I would strongly encourage you to make sure it's not tied to another report, but there may be some, something I'm unaware of there. yeah, I just, it is weird. So, no one should be seeing those reports until January one. They may come out a little bit before then, but really, you shouldn't see them, and the reporting period will be a 30-day reporting period. So, we'll open it January one through January 30th. That's really the period that you're supposed to be reporting in. And then we'll do that every after every quarter as well. So, you shouldn't see the reports yet again. We're still finalizing the documentation as well so that you'll know what, what they should look like. We'll give you the guidebooks and an additional training so that you'll see it all.

Speaker 1 01:19:50 All right, thank you William. Thanks all. Thanks to all the presenters today and thanks for all of your great questions. We will see you all again next Wednesday. And between now and then, please make use of the COC Special NOFO email box. you have that in the chat. We will be posting the materials for all three sessions as quickly as possible, and we'll continue to share the, the links to the slides. Please reach out to and to your TA coaches if you have one or you should have one, please reach out to them. If you have any questions about who your COC coach is, please reach out to us and we'll make sure that you're connected. If you're a recipient, reach out to your COC first, for information about TA that's available for the special NOFO and be look forward to answering any questions that you have, regarding this training and the other two trainings, the beginning of our next session. So, between now and then, have a great week and we'll talk to y'all soon. Thank you.