

U.S. Department of Housing and Urban Development (HUD)
Office of Lead Hazard Control and Healthy Homes (OLHCHH)

FY2021 NEW GRANTEE ORIENTATION

Program Tracking and Data Management

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Division Director*

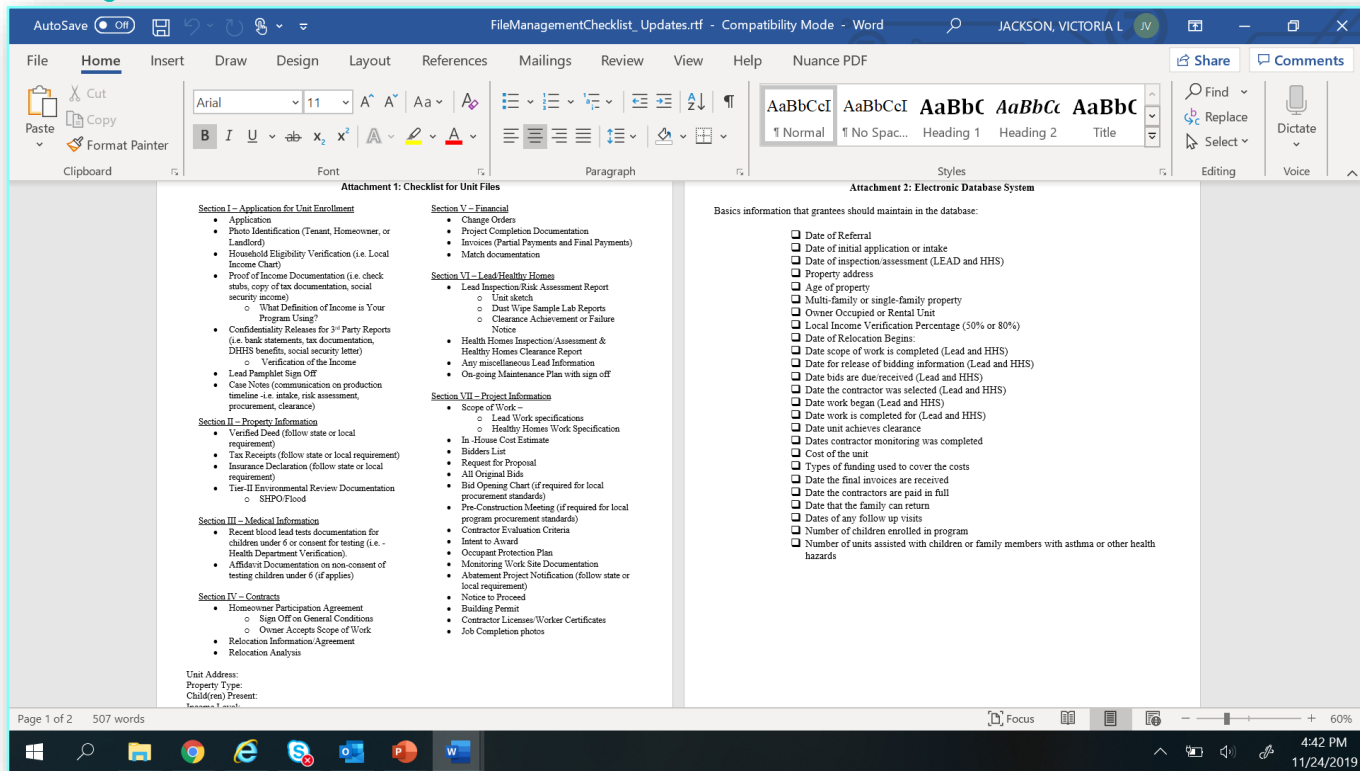


VIRTUAL CONFERENCE, MAY 3RD -MAY14TH, 2021

Objective

- Better understand the variety of best practice tools to use and track program requirement documentation

Unit File Checklist Items Electronically or Manual File



Program Database Tracking

Attachment 2: Electronic Database System

Basics information that grantees should maintain in the database:

- ☐ Date of Referral
- ☐ Date of initial application or intake
- ☐ Date of inspection/assessment (LEAD and HHS)
- ☐ Property address
- ☐ Age of property
- ☐ Multi-family or single-family property
- ☐ Owner Occupied or Rental Unit
- ☐ Local Income Verification Percentage (50% or 80%)
- ☐ Date of Relocation Begins:
- ☐ Date scope of work is completed (Lead and HHS)
- ☐ Date for release of bidding information (Lead and HHS)
- ☐ Date bids are due/received (Lead and HHS)
- ☐ Date the contractor was selected (Lead and HHS)
- ☐ Date work began (Lead and HHS)
- ☐ Date work is completed for (Lead and HHS)
- ☐ Date unit achieves clearance
- ☐ Dates contractor monitoring was completed
- ☐ Cost of the unit
- ☐ Types of funding used to cover the costs
- ☐ Date the final invoices are received
- ☐ Date the contractors are paid in full
- ☐ Date that the family can return
- ☐ Dates of any follow up visits
- ☐ Number of children enrolled in program
- ☐ Number of units assisted with children or family members with asthma or other health hazards



AutoSave On 1 2 3 4 5 Timeline Production Process Spreadsheet Updates xl... Search JACKSON, VICTORIA L

File Home Insert Draw Page Layout Formulas Data Review View Help Nuance PDF

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Clipboard Font Alignment Number Styles Cells Editing Ideas

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	A	B	C	D	E	F	G	H	I
1	Quarter Pipeline Status Report								
2	Rehab Address	Enrollment Date	Assessment Completed	Out For Bids Date	Under Contract Date	Construction Start Date	Clearance	Contractors Payment Date	Comments on Current Unit Status
3									
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updated version Sheet1

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Examples of Tracking System

AutoSave

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CAHP LSL Updated 11-13-19.xlsx

Search

JACKSON, VICTORIA L

File

Home

Insert

Draw

Page Layout

Formulas

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Review

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Wrap Text

Alignment

General

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Conditional Formatting

Format as Table

Cell Styles

Styles

Insert

Delete

Format

Cells

Sort & Filter

Find & Select

Editing

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Tracking System in HHGMS

- LOCCS Financial Reports
- Units Reports
- HHS Reports
- For more details on reporting and tracking in HHGMS please see contact Damian Slaughter (HHGMS)

The screenshot shows the 'Reports & Dashboards' section of the HHGMS application. The top navigation bar includes links for Home, Organizations, Contacts, Grant Applications, Grant Awards, Quarterly Reports, Grantee Requests, Reports (highlighted), Dashboards, and Units. Below the navigation bar, the 'Reports & Dashboards' section features a 'New Report...' button and two main panels: 'Folders' and 'All Folders'.

Folders Panel: Contains a search bar 'Find a folder...' and a list of folders under the heading 'All Folders':

- Unfiled Public Reports
- My Personal Custom Reports
- Company Dashboards
- Conga PointMerge Reports
- Conga Reports
- Grantee Reports
- Removal of Synapse Data Move
- Reports - Grantees
- Review Reports
- Organization and Contact Reports

All Folders Panel: Contains a search bar 'Find reports and dashboards...' and a table listing reports and dashboards. The table has columns for Action, Name, Folder, and Created By.

Action	Name	Folder	Created By
▼	Unit Files	Conga Reports	Rowe, Lani
▼	New QTR w/ Financials CC	Conga PointM...	Rowe, Lani
▼	LOCCS	Conga Reports	Rowe, Lani
	Company Performance Dashboard	Company Das...	Miller, Michelle
▼	Grant Award for single GA Form	Conga Reports	Rowe, Lani
▼	Units Visited	Conga Reports	Rowe, Lani

Below the table, there is a link: [Open Grantee Requests by GTR \(All\)](#).

Tracking Invoices and Costs in Financial System

- Administrative costs of times needed to broken down clearly
- Invoicing Details of Services is Key (when receiving invoicing from contractors make sure they have description of services)
- Ensure to collect supporting documentation for invoice review
- Match justification for every line and expense
- Efficient financial management system to track cost and file invoice data



Note: Record keeping of the costs are vital for file justifications and accurate file management.

Resources and Content on Tracking Systems Data

- HHGMS
- GTR
- Mentor Grantees
- OHLHCHH Website (NGO Website and OLHCHH Policies):

https://www.hud.gov/program_offices/healthy_homes/lbp/lhc



ANY QUESTIONS!!!!!!!!!!