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

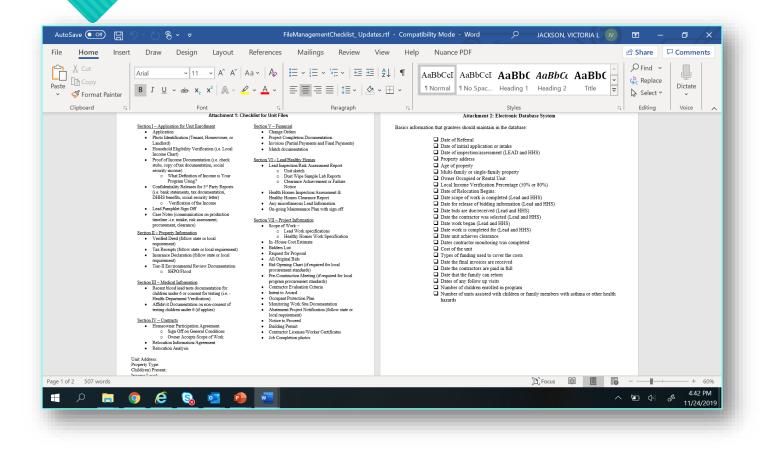
Yolanda Brown, Lead and Healthy Homes Program Division Director



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	
Oumber of units assisted with children or family members with asthma or other health	RAR
hazards	*



Examples of Tracking System

AutoSara Off 2 2 2 4 5 v B Timeline Produc	tion Process Sprea	adsheet Updates	xi •)x) Search	Q	JA	ACKSON, VICTORIA	l 😣 🗉 –	đΧ
		rge & Center 🕞	E General		Conditional Fo Formatting ~ 1	able * Styles *	∰ Insert × ₩ Delete × ₩ Format × Cells	C × A Z × A Z × A Sort & Find & V Filter × Select × Editing	Congreents ZC Ideas
A1 • : × √ fx									Ŷ
A		С	D	E	F	G	Н	I	
1 Quarter Rehab Address 2	Pipeline Status Enrollment Date		Out For Bids Date	Under Contract Date	Construction Start Date	Clearance	Contractors Payment Date	Comments on Curro Status	ent Unit
3 4 5 6									
7 8 9 10									
11 12 13 14									
15 16 17									
18 19 20 21									
22 23 24 updated version Sheet1 (+)					: •				, ,

Examples of Tracking System

utoSa	ave Off 🛛	5.	୯ - ହ	}~ ⇒	CAHP LS	L Updated	d 11-13-19.xlsx 🝷	2	Q S	earch			_		JAC	KSON, VIC		8	<u>T</u>	1 –	٥
e	Home Inse	rt D	raw	Page Lay	out Forr	nulas	Data Review	Vie	ew.	Help	Nuance	PDF							ස් 5	Share	🖓 Comme
	Calibri		~ 11							Gener		~				🔠 Inser 환 Delet		∑ ~ ↓ ~	A Z V	\sim	4
le	S B I	<u>U</u> ~ [<u>+</u> ~ •	🖓 ~ <u>A</u>	~ = =	= +	→= 🛱 Merge &	Center	~	\$~	% 🤊 🗧		matting Y	Format as Table Y	Cell Styles Y	Ħ Form	nat Y	√ ~		& Find & Y Select Y	Ideas
boar	d rs	Fo	nt		6		Alignment		E,		Number	rs.		Styles		Cells	.		Editi	ng	Ideas
	- : ×	 ✓ 	f_x																		
A I	в с	D	E F	а н	I J	N	0	Р	Q	B	s	т	U	v	v	x y	z	AA	AB	AC	AD
	Address (per unit)	Date Received			Tenant Last Name	Vaiting for:	Date final Docs Gathered	Date income Verified			Landlord Last Name	Date Initial Contact Made/Attempte d with	Date Most Recent Contact Made/Attemp	of Contact Attempts	Waiting For	Date Returned to City	Date Invoiced	Invoice	Amount Receive d	Payment Received	Notes
1	2																				
3	3																				Duplex-CAHP H
1																					other half Duplex-CAHP h
6	8 10 1012 Climax St	4/13/2017			Gallegos, M		5/15/2018	5/15/2018	Y		Wendy Brown	All Submitted	NA			5/17/2018	5/17/2018	3 650	650	30-Ma	other half
	12 3538 W Jolly Rd (duplex				Washington, S.				y		Katie - 2163 LLC	5/4/2018	5/23/2018			6/27/2018	6/27/2016				
8	13 3540 W Jolly Rd (duplex				C Weakly		5/25/2018				2164 LLC	5/23/2018	5/24/2018			6/27/2018	6/27/2018				
9	4 712 N Pennsylvania 28 210 Latkrop	3/8/2018			Villams, M. Campbell, B.		8-Aug	N-Aug			McLaughlin, John	3/13/2018	8/14/2018			8/15/18	9/11/18	-			
10		6/29/2018				Complete	13-Aug	24-Aug			Hank, Levis	7/17/2018	23-Aug		,	8/25/2018	9/18/2011				
11	11 222 N 8th St	4/24/2018			Duran, A & Molnar, M	Complete	22-Aug	28-Au;	, Y		Andrew Eshbaugh Cross, Lam, & Lena	4/27/2019	8/8/2018	5	Complete	9/4/2018	9/1//2011	8 750	75	0 3-04	<
12	15 132 S Magnolia	5/14/2018			Nondo, Sa	Complete	31-Aug	31-Aug	y Y		(Kenneth Smith, PDA)	5731/2018	8/31/2018	7	Complete	9/4/2018	9/18/2011	8 750	75	0 17-00	z.
13	23 6064 Southbrook	6/18/2018			Johnson, J&J	Complete					Southbrook Neighborhoood LLC	complete	complete	5	5	9/12/2018	9/12/2011	8 750	75	0 10-00	e e e e e e e e e e e e e e e e e e e
14	19 1430 Martin Luther King Blvd	5/25/2018			Johnson, Y.	Complete					M&P Investment Properties	6/12/2018	9/11/2018	1/8/1900		12-Sep	12-Sej	p 750	75	0 3-04	<i>z</i>
15	26 524 V Madison	6/27/2018			McPherson,	Complete	27-Jul	35-Ju	4 y		Calkins, Brady& Gary	7/18/2018	Complete	2	Complete	9/12/2018	9/12/2011	8 750	75	0 17-00	R
	39 524 1/2 Madison	14-Aug			Tolbert, K. Seidell, S	Zero Income /	Affidaviit from Sean Seidell				Brady Calkins		9/5/2018		Mortgage Staten	nei 9/12/2018	9/12/2016	3 750	75	0 17-Oc	
	31 3216 W Holmes (Duples)	7/5/2018			Tanner, E.	Completed	20-Aug				Raintree Management	8/9/2018	29-Aug	3		12-Sep	12-Se				
	32 3218 W Holmes (Dupler)	7/5/2018			Dobbs, C.	Complete	20-Aug				Raintree Management	8/9/2018	23-Aug		8	12-Sep	12-Sej				HUD Form-50058 m
19	36 2032 Hillcreat	7/19/2018			Fuller, C. Tuler-Bode, A &	Complete	11-Sep		Y		S&T Industries	7/23/2018	8/23/2018	6	Complete	26-Sep	26-Sej	p 750	75		MSHDA 8/28/18 Waiting on Employin Verification ; form m
	24 1221 Eaton Ct	6/18/2018			Bode, C.	Complete					Ct, LLC Jay Coter, HitH Real	complete	12-Sep	6		26-Sep	26-Sej				t 8/3¥18 Waiting on explanati
	29 1016 East Oakland	6/29/2018			Burch, A.	Complete	26-Sep				Property	7/3/2018	25-Sep	8	8	26-Sep	26-Sej				v cash deposits
22	47 6000 Pheasant Ave Active Co	24-Aug	Billod	Potura	Anderson, A	Complete	2-Oct	2-Do	ųγ		Kharmani, N	29-Aug	2-Oct	4		2-Oct	2-Oc	t 750	750	14-No	4
P	Active	mpiete	-billed	Return	lea-Not bille	u (+)						•			III		四			+
		_	_								_					=		2			
			e																		a 5:25

Tracking System in HHGMS

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

ALTHYHOMES Home Organizations Contacts	Grant App	lications Grant Awards Quarterly Reports	Grantee F	Requests Rep	orts Dashboards	Uni
Reports & Dashboar	ds New Rep All Folde					
Find a folder						+
	Q Find r	reports and dashboards			Recently Viewed	۳
II Folders	Action	Name	0	Folder	Created By	t
My Personal Custom Reports		Tunit Files		Conga Reports	Rowe, Lani	
Company Dashboards	¥	New QTR w/ Financials CC		Conga PointM	. Rowe, Lani	
Conga PointMerge Reports		LOCCS		Conga Reports	Rowe, Lani	
Grantee Reports		Company Performance Dashboard		Company Das	. Miller, Michelle	
		Grant Award for single GA Form		Conga Reports	Rowe, Lani	
📄 Removal of Synapse Data Move						
Removal of Synapse Data Move Reports - Grantees Review Reports		Tunits Visited		Conga Reports	Rowe, Lani	

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

- **O** HHGMS
- O GTR
- O Mentor Grantees

• OHLHCHH Website (NGO Website and OLHCHH Policies): https://www.hud.gov/program_offices/healthy_home s/lbp/lhc

ANY QUESTIONS!!!!!!!!!