ESG CAPER (2016) – Canned Report

Contents

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The ESG CAPER report is designed to capture data for required for submission to HUD. ESG funded programs will download this report, submit it to the Grant Administrator for upload into the E-Cart. The ESG CAPER is referred to as a "canned" report. Canned means the report it is a tool of ServicePoint and is not an ART report. This report runs in live time and uses live data.

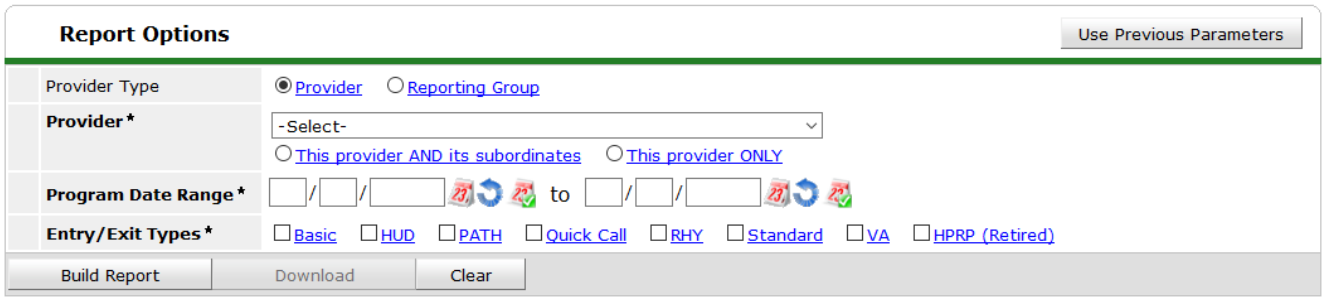
Data Requirements:

1. Data Entry
    a. The HUD Universal Data Elements must be completed for every client served, including all members of the client's household.

2. Entry Exits
    a. All clients must document an Entry Exit relative to the time a client was enrolled in the program.
        i. Interim Reviews are completed to document updates to the client's income, non-cash, health insurance, and disability status. For RRH programs, the date in permanent housing updated.
        ii. Destination must accurately reflect where a client exited to.

Report Prompts:

Report Prompts must be correctly filled out:



1. Provider Type: Provider
    a. Unless a reporting group has been created for your agency, "Provider" should be selected.
2. Provider*: You must select the correct provider on your provider tree
    a. "This provider AND its subordinates"
        i. This could be used if the agency's provider tree is set up in a way to allow for this functionality, however the ETH form does require separate client information by provider type, so will not work in most cases – see your HMIS Coordinator with questions.
    b. "This provider ONLY"
        i. Agencies will generally select this one. It will pull only information relative to the provider selected in "Provider*" prompt.

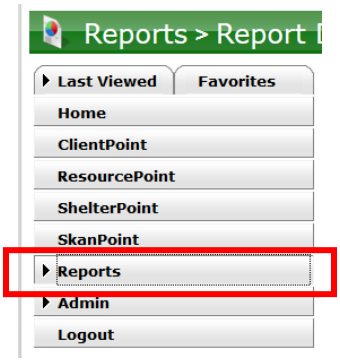
3. Program Date Range*:
   For canned reports end dates are the last date of the month in which you are running the report for.
    a. For example: If you are running the report for the grant start date through the end of February, your start date would be 7/1/15 and your end date would be 2/28/16.
    b. For example: If you are running the report for the grant year, the start date would be 7/1/15 and your end date would be 6/30/16.
4. Entry/Exit Types*:
    a. All programs check the box for the Entry/Exit type used.
5. Click "Build Report" once prompts are completed.

Notes:

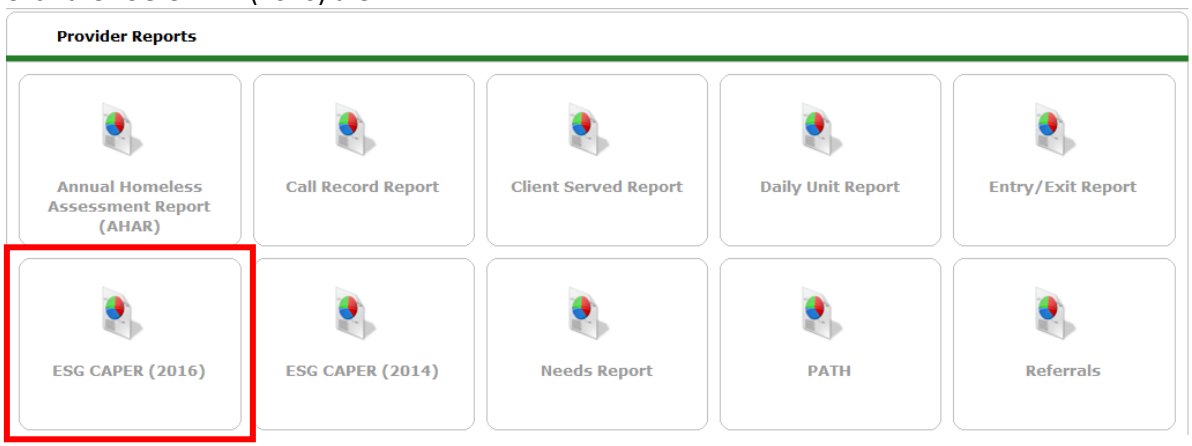
- You have the ability to fix the data in this report in live time and run the report to check the fixes.
- If report is not returning data you expect to see, there are various other reports available to review the data in both canned and ART.

To Access the ESG CAPER (2016) report:

1. Click the Reports tile on the left-side menu.



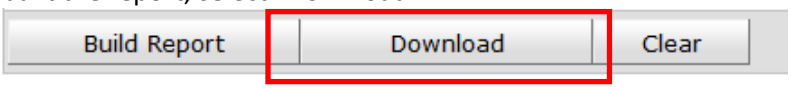
2. Click the ESG CAPER (2016) tile.



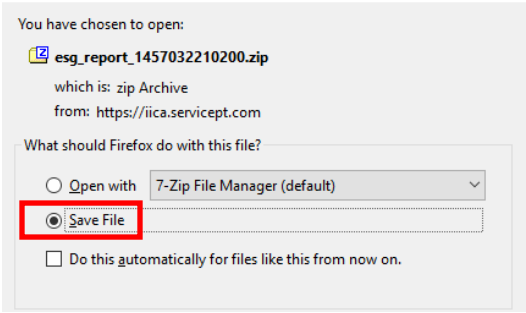
To Submit the Report to Grant Administrator

After you have run the report and address data error issues, the report can be submitted to the Grant Administrator.

1. Once you have built the report, select "Download":



2. This will create a Zip folder to save to your computer.



- In the folder will be one excel file for each question in the report. Leave the files in the zip folder and submit to your ESG grant administrator.

Important Note This report must be run one project at a time.

For example: If you received ESG funding for Emergency Shelter and ESG funding for Rapid Re-Housing you will need to run the report twice, once for each respective project type.

1. Gather the zipped files from each of your projects.
2. Name each zipped file using the following convention: Agency/Project Name/Agency Project Type
3. Email all of the zipped files to the grant administrator.
4. The grant administrator will review the files using the HUD eCart tool and tell you if your data are ok, or if you need to do any corrections. Per HUD, data errors on any one project may not exceed 25%, or the agency must correct their errors in HMIS and submit a new zipped file.

eCart Tool

Agencies may wish to check the data themselves to ensure that there are no data errors before sending it to the grant administrator. This is not required. You must have Microsoft Excel version 2010 or higher to check the data. Please note that even if you unzip the files to import them into the eCart tool, you must still submit the "zipped" version of the files to the grant administrator. Your version of the eCart tool should NOT be submitted to the grant administrator.

To check the data using the eCart tool: Go to the following link and download the "eCart (ESG-CAPER Annual Reporting Tool)" at the bottom of the page.
https://www.hudexchange.info/resource/4785/ecart-esg-caper-annual-reporting-tool-and-guide/

Open the eCart tool in Microsoft Excel (version 2010 or higher) and follow the instructions on the first tab to import data from your lead agency and sub-recipient projects. Check for data errors under the "Check Your Data" tab.