SAGE USER MANUAL

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INTRODUCTION

This manual compiles information on using the ***Sage HMIS Reporting Repository (Sage)*** for HUD Reporting. This manual presents information on how to use ***Sage**,* from creating a user account to navigating the dashboard. The ***Sage*** HMIS Reporting Repository is a web-based reporting portal which can be accessed at www.sagehmis.info.

This manual does not provide guidance on HUD reporting. HUD Guidebooks, which contain instructions on specific reports such as the Annual Performance Report (APR), or the CAPER, etc., can be found on the HUD Exchange or in the RESOURCES tab in ***Sage***.

If you are having account or reporting issues with ***Sage***, you can submit an AAQ through the HUD Exchange selecting ***Sage*** in step 2.

The AAQ responders are system administrators and can assist with reporting and access questions. Providing as much detail as possible in the AAQ will enable the responder to address the question quickly. Please be sure to identify the grant number for a Continuum of Care (CoC) Program Annual Performance Report (APR) or the name of the recipient for a Consolidated Annual Performance and Evaluation Report (CAPER) or Emergency Solutions Grants COVID-19 (ESG-CV) reporting question.

Terms Used in *Sage*

Sage was designed to provide access to the same information to multiple parties: grant recipients, Continuum of Care leaders, and HUD staff. Because ***Sage*** is used by different programs to report on their grants there is a common language developed for ***Sage*** that crosses all grant programs:

- **User Level**: The level of access an individual user has in ***Sage.*** The user levels vary depending on the type of entity the user is affiliated with.
- **My Dashboard**: The users' customized dashboard from which all reports, tools and information are accessed.
- **Entity**: The organization the user is affiliated with. An organization is a specific grant recipient, CoC, or HUD Community Planning and Development (CPD) Field Office. If a ***Sage*** user holds more than one position, (e.g. they work with the organization responsible for the CoC process and must complete an APR for a planning grant), they will have two entities they are affiliated with (the CoC entity and the recipient of the planning grant entity) in one user account.
- **Quick Connector Box**: A square box on the top of the dashboard that links the user to the CoC, YHDP, Unsheltered & Rural, and/or ESG reports. A user will only see the quick connector boxes for programs associated with their user account in ***Sage***.
- **Reports**: The Annual Performance Report (APR) is used to report on programs funded through the CoC; the CAPER is used for ESG. Reports that are submitted quarterly are referred to as Quarterly Performance Reports (QPR).
- **Notebook**: The section of the page that contains the list of reports for the entity.
- **Launchpad**: The submission page for reports that provides access to all of the report information and forms.

Accessibility

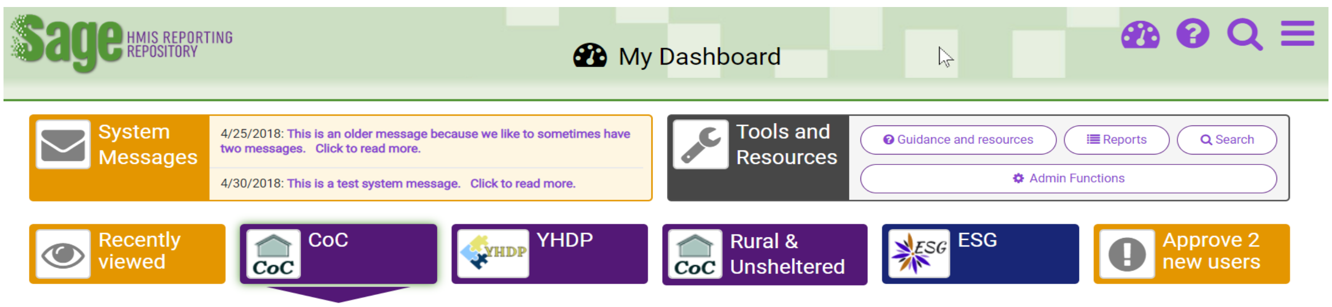
Persons with disabilities, including those who are vision or cognitively impaired, need a screen reader, have a history of seizures, or require an ADHD safe environment, should use the accessiBe plug in tool found on the left corner of the page. By selecting this, you may select from a variety of adjustments from content, color, orientation and more. Once these features are selected, ***Sage*** will remember and turn them on for you each time you use the system from the same computer.

All **purple words** in ***Sage*** represent a link. Clicking on any **purple wording** will open up a corresponding link. If you cannot see colors use the accessiBe link in the bottom left of the screen. In the content adjustment section, you will find a highlight links button that will make all the links in ***Sage*** boxed and standing out to make the link identifiable.

DASHBOARDS

My Dashboard

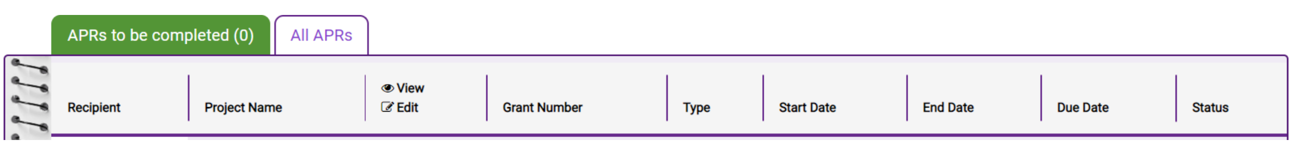
The Dashboards were updated in the summer of 2023. Logging into ***Sage*** now takes a user immediately to their **personalized "**My Dashboard" page. The dashboard is the user's custom starting point in ***Sage***. It is designed to assist in the navigation of ***Sage*** by creating a central space for everything the user has access to in the system from one place.



The My Dashboard view in ***Sage*** allows a user to navigate the system based on their personal user account settings in ***Sage***. From the dashboard, the user can click on the **quick connector box** with the HUD program label: CoC, YHDP, Rural & Unsheltered, or ESG. The access level to different programs or reports may vary as you move through ***Sage***. Each program and function recognize the user's specific level of access that has been approved on their user account in ***Sage*** for the action they are trying to take in ***Sage***.

My Notebooks

Each of the HUD programs has individual notebooks customized for the user accessing them. The notebooks in ***Sage*** display a list of APR or CAPER reports that the user has access to. In each notebook, there is a tab for "Reports to be completed" and another for "All Reports," that when clicked takes you to the appropriate list of reports. By clicking on the Project Name for APRs or Launchpad link for CAPERS, the report you want will open to view or complete.



My Access

Access to ***Sage*** is completely customized for the individual user based on their user level.

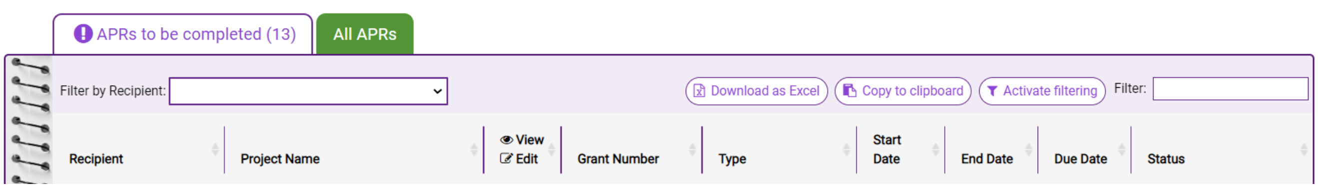
CoC access

As an example, let's look at Sherri who works for USA City. Sherri works on the CoC grant every year because the city is the collaborative applicant. Once a year, she completes a Planning Grant APR because USA City is the recipient of the CoC's Planning Grant. Sherri's department in USA City also includes the YHDP program coordination and grants.

Sherri's user account in ***Sage*** identifies her as a part of the CoC leadership because she identified her position as **Continuum of Care** with her continuum and has Data **Viewer** access to the CoC XX-000. Her account also show she is affiliated with the **Recipient-CoC** organization and gives her **Data Entry** access to both the CoC and YHDP APRs.

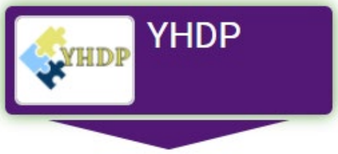
Because of her user account Sherri sees 2 buttons on her dashboard: CoC and YHDP.

As a CoC leader, Sherri wants to look at all APRs the CoC has coming due, so she clicks on the CoC button. Her personal notebook opens. Her CoC access to XX-000 allows her to view all of the CoC grants and get the related CoC wide reports. But she cannot enter data in any APR except the planning grant where her organization is the recipient of the grant. The grants that are ready to be completed are in the first tab. The entire list of grants for that CoC are in the "All APRs" tab.

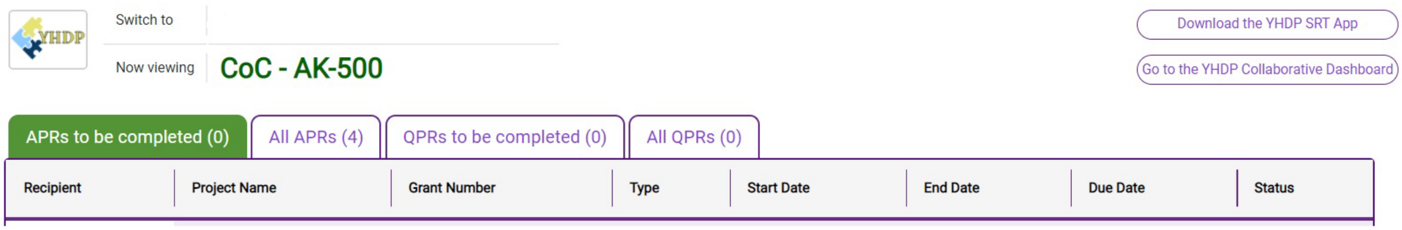


Sherri knows what access level she has for each individual grant based on the View / Edit on the row with each report. The eye symbol means the user can only view the report, they cannot edit it. The pad and pencil mean the user can work on the report, adding and editing information as necessary.

YHDP access

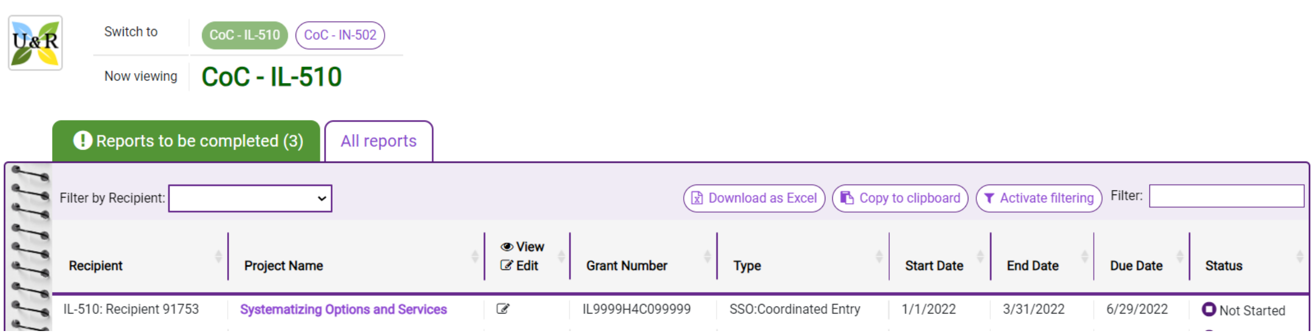


If Sherri wants to see the YHDP reports, she clicks on YHDP, and the notebook page turns to the YHDP section. From there, she can access any APRs or QPRs, and she can download the YHDP SRT App, or can Go to the YHDP Collaborative Dashboard, where she is now automatically a member.



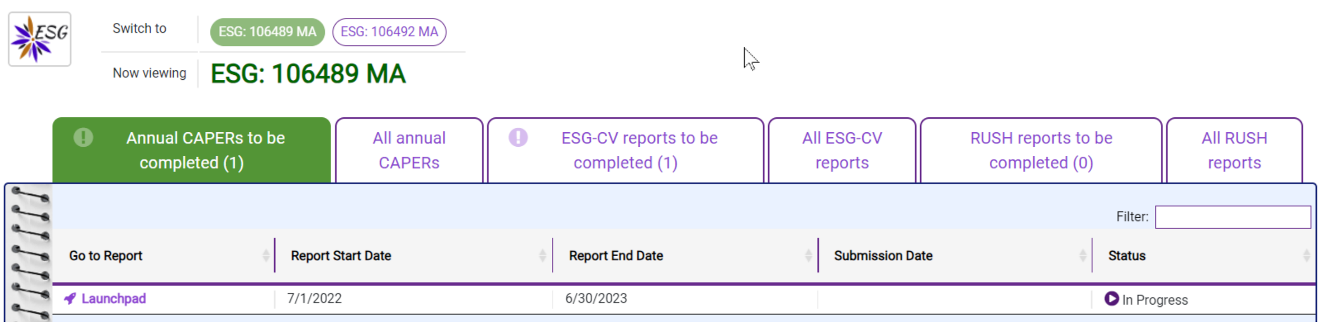
Rural and Unsheltered program access

Now let's look at Ken. Ken's agency received funding from the Special NOFO to Address Unsheltered and Rural Homelessness. As part of his job, he needs to complete the Street Outreach report. His access to ***Sage*** is as a **Recipient – CoC position,** and the entity he identified is his agency. Ken was approved as a Data Entry user, so he has access to his agency's reports and can complete them.



ESG access

Jon works for a medium-size city in Florida and manages all their ESG grants. Jon's account shows he is a **Recipient – ESG** for his city and has **Data Entry** access to ESG in ***Sage.*** He sees the ESG quick connector box on his dashboard. When he clicks on it, he has access to multiple different ESG related program reports: Annual ESG, ESG-CV and RUSH, because his city has all three awards. From the notebook section he can move between the reports as needed.



NAVIGATING *SAGE*

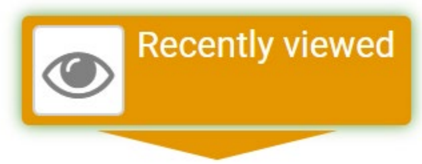
Changing entities

If your organization has grants in a variety of CoCs, all CoCs that you have access rights to—as CoC leadership or a CoC grant recipient—are available to you through the CoC button. Clicking a CoC button on the "Switch to" row will move you between entities.

If you are a user affiliated with a national organization (e.g., Salvation Army, VOA, etc.) where you need to move between your various organizations, the "Switch to" automatically shows you all the CoCs that the entity is affiliated with. Clicking on a different CoC will change the reports in your notebook to that entity.

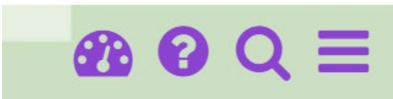
Recently viewed

There is a recently viewed button that when clicked will display the 15 most recent reports you have opened. Then, clicking on the project name will open the report.



Navigation bar tools

On the top right side of each page, there are four navigation tools to access.

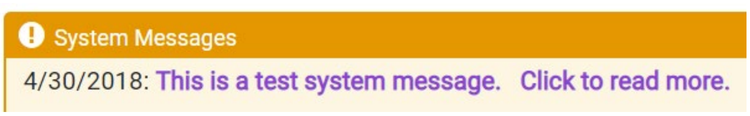


From left to right:

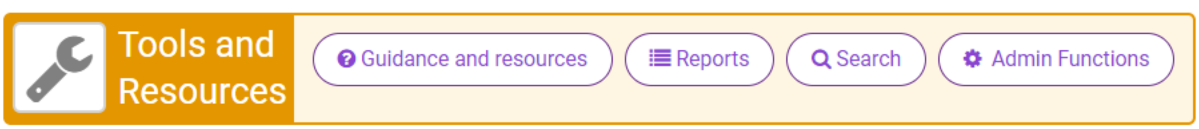
- ✓ Click the speedometer to return to "My Dashboard" from anywhere in ***Sage***.
- ✓ Click the question mark to find resources (guidebooks, tip sheets, links, etc.).
- ✓ Click the magnifying glass and enter the grant number or PIN to search for a CoC, YHDP, or Rural & Unsheltered grant. Enter the ESG recipient name to search for a CAPER.
- ✓ Click the hamburger button (the three horizontal lines) to log out, update your account, find administrative tools, and access a list of all reports available to your user level.

System Messages

HUD or the System Administrators of ***Sage*** will post system Messages from time to time on updates in ***Sage*** or specific information for program users. Messages will generally pop up after a user logs on to ***Sage***. The user may disable a Messages from continuing to pop up. The Messages is filed for reference for a short period of time in the System Messages bar on the top left side of the dashboard.



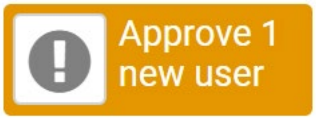
Tools and Resources



The Tools and Resources box contains buttons which will open specific information.

- ✓ **Guidance and resources** allow you to access all of the program guidebooks, manuals, and materials to assist you to complete the reports in ***Sage***.
- ✓ **Reports** is the location for all ***Sage*** Reports – including lists of grants, bed/unit inventories, aggregate data reports, user lists, and reports specific to your work in ***Sage***. See Reports for information on how to generate a report.
- ✓ **Search** will open the search text box. Enter the recipient's name, grant number or grant PIN in the box and click search. If you have access to the recipient or grant that you searched for, it will display, and you will be able to access it. If it does not display it the grant may be in ***Sage***, but your user level does not give you access to find it.
- ✓ **Admin Functions** is a direct link to administrative functions, such as approving a user or adding a user. You only have access to the Admin Functions if you have a user level with "Admin" in the name.

Approving A User



If you are either a Data Entry and Account Admin User or Data Viewer/Account Admin, you may approve ***Sage*** users. You will see the number of users awaiting your approval on your dashboard. Clicking on the box will open the user account page and will enable you to set the user level and [approve the account](#) or deny the person access to an entity in ***Sage***.

To approve a user, set the level of access that the individual needs. Then click the check mark. The status will change from pending to approved. To [deny](#) an individual, click deny.

SAGE USER ACCOUNTS

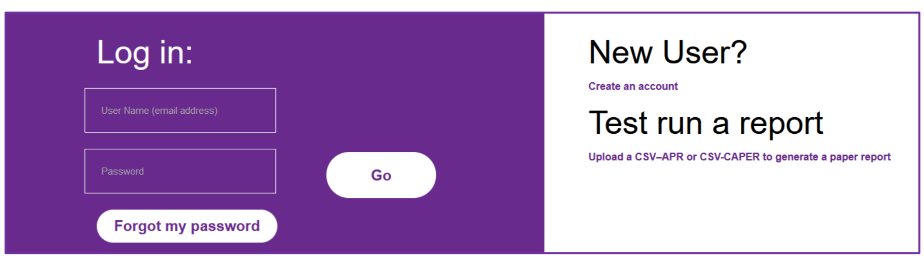
Sage user accounts allow an individual access to entities they are affiliated with. The user's view of information in ***Sage*** is based on their user level.

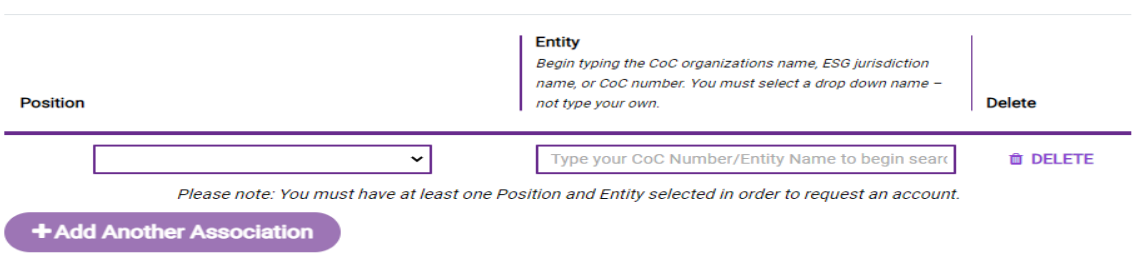
A few important considerations for access:

- User accounts may not be shared. Each individual requiring access must have their own account. There may not be a 'general' account which is accessed by multiple people. Every keystroke in ***Sage*** is affiliated with the user who is logged into the system.
- Users should not have multiple accounts in ***Sage***. Users should associate themselves with multiple entities by clicking "Add Another Association". In the Position and Entities section of this document are examples of when another association may be appropriate and detailed instructions on adding another association.

Sage user accounts

All users must create an account and be authorized to use ***Sage*** prior to viewing or editing any information. To create an account, go to [www.**sage**hmis.info](http://www.sagehmis.info) and click the **Create an account** link under "New User?"





Complete the left side of the form with the user's contact information.

a. Enter the user's work email address, which ***Sage*** will establish as the username and where ***Sage*** will send emails regarding activity.
b. Create a password for the account. Passwords must contain:
   - At least 6 characters.
   - At least one uppercase letter.
   - At least a special character (*, $, #, etc.).
   - At least 1 number.

Complete the right side of the form identifying the user's position. (See chart below) Then begin typing the CoC number or a portion of the entities name and select it from the dropdown menu. Click **Request Account** and an **Account Created** pop up message will display to indicate the user's part of the process is complete. The user will receive an email confirmation to the email account used in setup indicating the account request was generated.

When a new or existing ***Sage*** user requests access to the entity, an Account Admin(s) responsible for approving accounts for the specific entity receives an email indicating there is a pending request. Account Admins should log in to ***Sage*** within 72 hours and approve or deny the request. When the request is approved or denied the user requesting the account will receive an email from ***Sage.***

User Account Basics

A user may be affiliated with a variety of entities and need to use ***Sage*** in different ways for each entity. Identifying the users position tells ***Sage*** how they need to use the system. Identifying the entity itself aligns the user with all the information in ***Sage*** about a particular entity.

The entity must be selected from the drop-down list of choices. Click into the entity box and type in the CoC number or some of the entity name and then select the correct entity.

If you receive funding from HUD and will be responsible in any way for reporting, you must create a Recipient account in ***Sage***. The position must either be Recipient – CoC Grant or Recipient – ESG Grant.

User Account Positions

POSITION **"What do I do"**	**DESCRPITION**	**AFFILIATION** **"What do I see"**
Recipient – CoC Grant	The user is an employee of the organization who received the CoC grant or has the recipient's direct approval to access their APR reports in ***Sage***. These persons may see all APR reports, complete the reports, and access other information about the recipient in ***Sage***. If a CoC recipient organization has been awarded a YHDP or an Unsheltered & Rural grant, the user will automatically have access to those reports in addition to their CoC grant reports.	My Account will give you access to: CoC YHDP U&R If the entity the user is affiliated with is a grant recipeint of any or all of these programs, the user will have access to all program the entity reports on.
Recipient – ESG Grant	The user is an employee of the City, State, County, or Territory that is the ESG Recipient or the recipient has given their direct approval to access their ESG reports and financial information in ***Sage***. Users may not be the subrecipients or sub-subrecipient of a	My Account will give you access to any form of ESG funding including ESG (Annual), ESG-CV, and RUSH as appropriate.

	grant. HMIS Leads do not require access to ESG in ***Sage***. These persons may see all APR reports, complete the reports, and access other information about the recipient in ***Sage***.	ESG
Continuum of Care	The user is a member of CoC leadership, board, steering committee, grant writer or is another individual that the CoC leadership wants to allow access to all reports in the CoC. Access to the full CoC information is provided by the CoC based on CoC policies.	My Account gives you VIEW ONLY access to the work of the entire CoC which will include YHDP and Unsheltered & Rural as appropriate. CoC YHDP U&R
HUD Field Office	HUD Field Office users are CPD Representatives and Directors who work on any aspect of programs reported in ***Sage***.	CoC ESG YHDP U&R (Refer to Field Office Guidance)
HUD Administration	HUD Administration encompasses all users at HUD Headquarters.	CoC ESG YHDP U&R (Refer to Field Office Guidance)
Participant – Special Funding Initiative	This position enables someone to use the YHDP Dashboard in ***Sage*** without having access to specific recipient entities reporting data. Examples of persons with this access level include Youth Advisory Board Members, Planning Committee members, etc.	YHDP

User Account Levels

Position	**User Levels**	**Description**	**Approval by**
CoC - Recipient	**Data Entry**	May **add and edit APRs** on any grants given to the recipient by HUD.	CoC Recipient – Account Admin **or** CoC Account Admin
CoC - Recipient	**Data Entry/Account Admin**	May **add and edit APRs** and can **approve other users** of the entity.	CoC Recipient – Account Admin **or** CoC Account Admin
CoC - Recipient	**Data Viewer**	May **view only** APRs	CoC Recipient – Account Admin **or** CoC Account Admin
CoC	**Data Viewer:**	May **view only** all information on the entire CoC	CoC Account Admin or HUD
CoC	**Data Viewer/Account Admin**	May **view only** all information on the entire CoC can **approve other users** of the entity.	CoC Account Admin or HUD
ESG Recipient	**Data Entry**	May **add and edit APRs** on any grants given to the recipient by HUD.	ESG Account Admin or HUD
ESG Recipient	**Data Entry/Account Admin**	May **add and edit APRs** and can **approve other users** of the entity.	ESG Account Admin or HUD

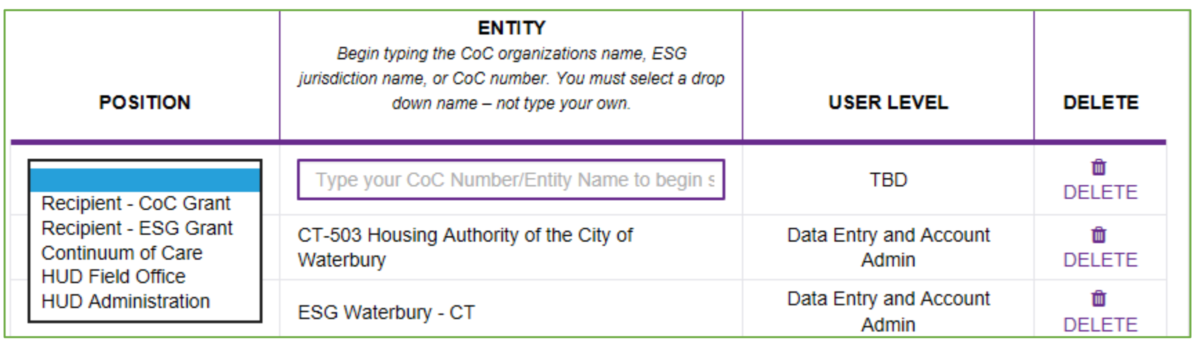
ESG Recipient	**Data Viewer**	May **view only** APRs	ESG Account Admin or HUD
Participant Special Funding Initiative (YHDP Dashboard)	**Data Viewer**	May **view only** the YHDP Collaborative Dashboard	Another YHDP Dashboard user from the CoC that is an Account Admin.

Adding another association to an account

2. Click on the **Add Another Association** button at the bottom of the page.

3. Select the **POSITION** that you have related to the APR or CAPER**.** (Note subrecipients do not have direct access to ***Sage*** for the CAPER and should not have an association with ESG; subrecipients of CoC grants may only have access if the recipient grants access to them.)

4. Find the entity you want to associate with by typing the name of the ENTITY (recipient name or CoC number, example CT-503 in the picture below) that you need to add to allow ***Sage*** to search for appropriate choices. When names appear, you <u>must select a name from the drop-down menu</u> -- do not type a name in.

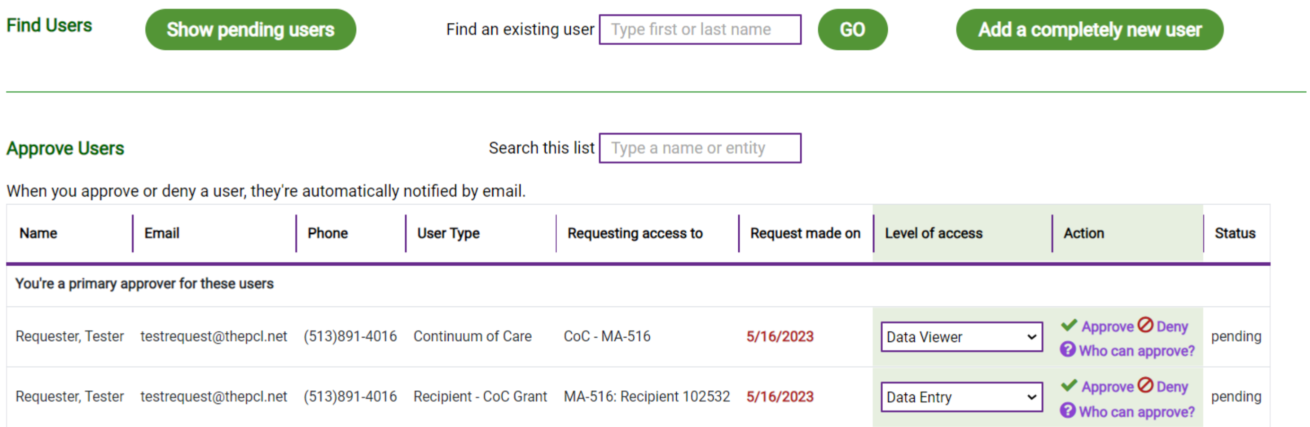


5. The USER LEVEL will change from TBD to “Pending Approval.”

6. If you are not a Data Entry and Account Admin user level, your account will have to be approved by an Account Admin user at your organization, the ESG jurisdiction, the CoC or HUD prior to your ability to access a new entity.

Account Approval and Authorization

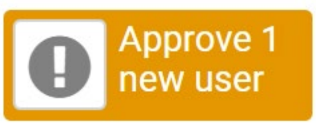
HUD has given the responsibility for ***Sage*** access for CoC, YHDP and Rural and Unsheltered programs to the CoC. The CoC should always have at least one person, and preferably two, who can review access requests and make a user determination. ESG access is controlled by the person at the ESG recipient entity that has a Data Entry and Account Admin user level.



The person(s) with an Admin user level is authorized to:

- approve other users for the entity
- manage user level access
- remove user from the entity

When a new or existing ***Sage*** user requests access to the entity, the Account Admin receives an email indicating there is a pending request. Account Admins should log in to ***Sage*** within 72 hours and approve or deny the request. Click the Approve a New User box and the Admin:User Page will open



A list of users who have requested access to an entity in ***Sage*** will be on the screen. To approve an account, select the level of access and then click **Approve**. Adjust the user level accordingly.

When to Approve or Deny an account

The CoC may have a policy on how the ***Sage*** accounts can be managed. They may elect that all access come through the CoC users with Account Admin user levels for review and determination and/or they may elect that each of the recipient organizations may have their own Account Admin to approve users for their entity.

However, the accounts are managed, the users who are approved to use ***Sage*** should have a "need to know" the information in the system.

- ✓ For a CoC, YHDP, or Rural & Unsheltered recipient this may include grant managers, finance staff, project supervisors, or organizational leadership.
- ✓ For YHDP community leadership and youth advisory board members who are not recipients of YHDP funding, but want/need access to the YHDP Collaborative Dashboard, they may be approved either by the CoC locally or through a request to the HUD AAQ, selecting ***Sage*** in step 2. These users should be identified in the position box as "Participant – Special Funding Initiative". If this is the only use of ***Sage*** they require when they log onto ***Sage***, they will be taken directly to the YHDP Dashboard and will not have to go through a recipient's dashboard to get there.
- ✓ For a CoC the community should determine who the appropriate users are. They may include CoC staff, CoC board/leadership, CoC recipients, etc. Access to entities through the CoC is always a View Only user level, so though the user may see all information related to recipients they may not enter data in ***Sage***.
- ✓ For ESG the recipient (city, county, state, or territory) which receives the funding from HUD is responsible to determine who may use ***Sage***. All ESG recipients must have at least one person

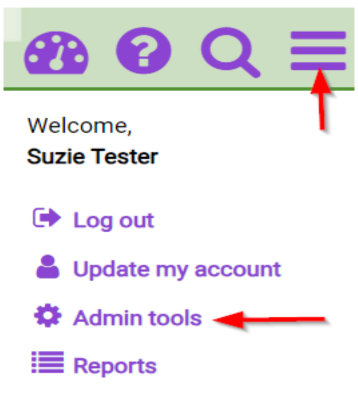
designated as a Data Entry and Account Admin user. This person can approve other users and is an authorized representative of the recipient to submit the report to HUD through ***Sage***. ESG Recipients should not give system access to subrecipients. Subrecipients will be able to provide reporting information through an upload portal created by the recipient in the CAPER itself. HMIS Leads do not need access to ESG. The HMIS Lead may work directly with a subrecipient who needs assistance downloading the CAPER report from HMIS and uploading it to their portal, but do not need direct access to the ESG report in ***Sage*** to do that.

Deleting or Closing *Sage* User Accounts

Persons at the CoC with Data View & Account Admin, CoC recipients with Data Entry & Account Admin, and ESG recipients with Data Entry & Account Admin user level access can deactivate an existing user. You can also submit an AAQ, selecting ***Sage*** in step 2, to be deactivated.

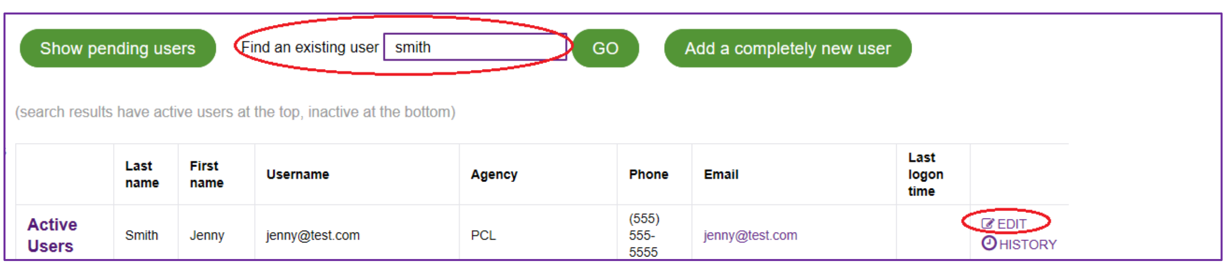
To deactivate a user:

1. At the top right of any page click the hamburger symbol (three horizontal lines), a drop-down menu will appear then click the Admin Tools link.

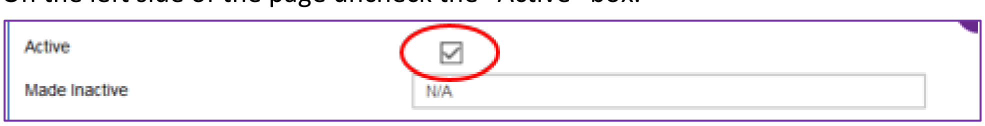


1. Search for an existing user in the box and click Go. The user's information will appear.

2. On the line with the user's name click **EDIT** to open the user account.



3. On the left side of the page uncheck the "Active" box.

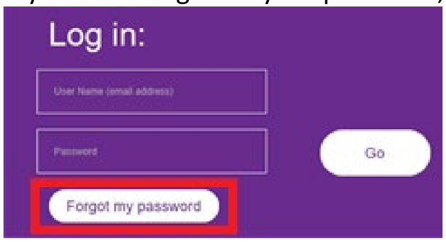


4. A pop-up will appear confirming you wish to deactivate the user and remove all association. Select "Ok" if you wish to continue with the deactivation.
5. ***Sage*** will then show you that the user is no longer active, and the date will appear in the "Made Inactive" field.

LOG IN FAQs

I forgot my password

If you have forgotten your password, use the “Forgot my password” button below the log in credentials.



Enter the work email address you used to create your ***Sage*** account and then click on “Forgot my password”. Within minutes, the user will receive an email from ***Sage*** at the email address set up as their username in ***Sage***. A numeric code will be in the email. On the log in page enter your work email address and then the numeric code from the email as the password. ***Sage*** will log in and immediately require the user to reset their password. Use the temporary code as the current password and then create a new password.

*NOTE: Each time the “Forgot my password” link is clicked **Sage** will reset the temporary code to a new code. If you click multiple times, you will receive multiple emails with different temporary codes. Use the most recent email.*

Sage locked me out

Repeated incorrect attempts to log in using either the wrong username or password will lock a user out of ***Sage.*** Use the “Forgot my password” link to reset the password using the correct email address as your username.

I didn’t receive an email

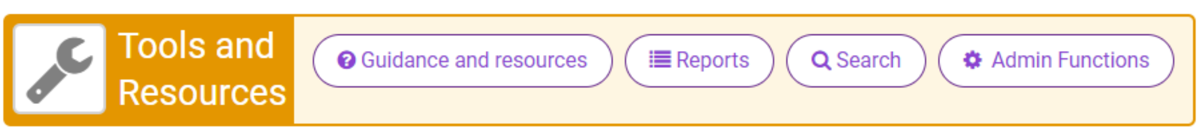
First, check your spam or junk folders. If the email is there you must identify it as a safe sender. If the email is not in junk, you should speak with your IT department to make sure ***Sage@Sage***hmis.info is marked as a safe sender on your server.

Not authorized to use this page

If you have requested access to a ***Sage*** entity but see a “not authorized” page that means your account has not been approved yet. Contact the Account Admin of the entity. If the Account Admin is no longer with the entity you are requesting access to, you can submit an AAQ, selecting ***Sage*** in step 2 and ask for authorization to use the system.

REPORTS

Sage generates a variety of reports based on the data that is reported in the database. On all dashboards the reports relevant to a particular user are available by clicking the Reports button in Tools and Resources.



For quick access to a report your recently used reports will show at the top of the screen.

There is a Search box to use to look for a report. It searches based on the name of the report.

Search for something in this list: CoC

CoC - All APRs - Recipients and Status	Lists APRs (number, component, dates, latest status) by recipients that are affiliated with a CoC
CoC - All CoC Grants	Lists all grants (number, award amounts, beds/units, component type) affiliated with a Recipient or CoC
CoC Recipient - Grants and Submissions	Lists all grants and submission of a CoC recipient
CoC and Recipient User Levels	Shows users at the CoC as well as users at all recipients within the CoC

Click on the report name to access the report. A user will only be able to view reports that their user level permits them to view. The user will select the criteria necessary for report generation by selecting from option lists that are targeted to the specific information the report will generate and allow the user to select the information they want in the report.

1. Report criteria - Select the organization, recipient or CoC from the list. If you are a user who can generate reports on multiple entities, you may run the report across all entities by holding down the CTRL key on your keyboard and clicking the mouse on the entities to be reported on.
2. Date Range – Reports that are not being generated to produce a standardized report have a section that requires the user to identify the date range of a particular report. A date range may be for example a fiscal year, or a year in which the grant(s) started. When needed, the date range field is defined in the description of the report.
3. Project Types – Some reports allow the user to filter to run the report across all projects in the date range or just a particular project type like RRH. The user may select one or more project types for the report.
4. Sections – If the report has multiple sections the user may elect to run one or all the questions at one time. If the user, for example, only wants to know how many people were served they would select to run just Q7, the number of persons served.

When the criteria have been identified, then use the buttons to either view the report on screen, generate the report in an Excel file for downloading, or email the report to yourself as an Excel file attachment.

SPECIAL FUNCTIONS

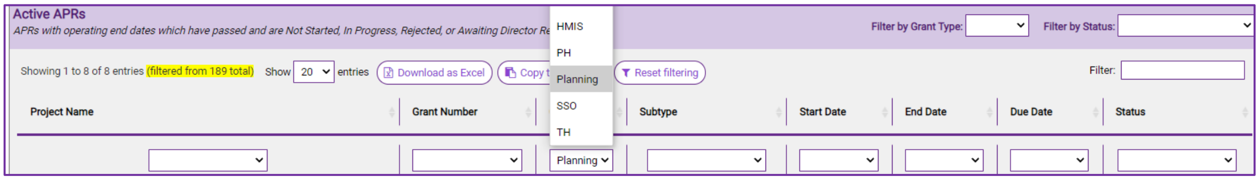
HELP

Many reporting pages have a HELP link button on the top right corner of the page. The HELP links to the Guidebook for the report being worked on and takes the user directly to the section that relates to the form being completed.

Active Filtering

The active filtering button on many reports and tables allows each column to be filtered. The filter box has a drop-down list/key word filter function. Select the item to be filtered for. One or more columns may have filters applied. Once applied the list can be

- Viewed onscreen
- Downloaded to Excel
- Copied to a clipboard



Jump to buttons

Jump to buttons are links which enable a user to quickly move around the page to the table of their active APRs or CAPERS and Reports quickly by clicking on the button in the Jump to box.

Test a CSV

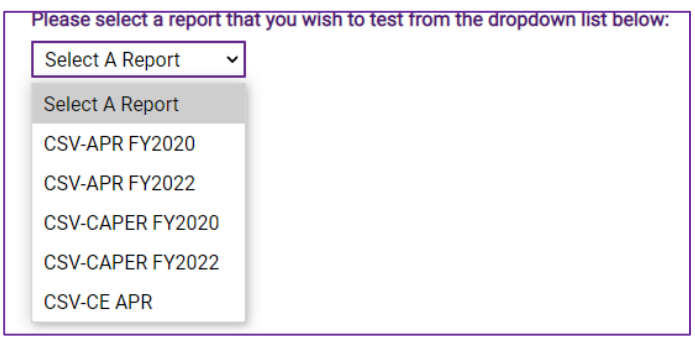
Sage has a built-in testing system for the CSV-ESG CAPER and CSV-APR reports which can be accessed on the log in screen of [https://www.***Sage***hmis.info/](https://www.Sagehmis.info/). It will test the CSV of the associated report and allow the user to run a report and print the results of the APR. It will **not** save the CSV in the ***Sage*** system.

Anyone may test a CSV file with or without having a ***Sage*** account. HUD strongly recommends Vendors of HMIS Systems, Vendors of Comparable Database Systems, and HMIS System Administrators test their CSVs prior to any report releases or updates.

To test a CSV, the user must have a the single .ZIP file available on their computer. This could be on their desktop, in the computer files, or accessible through a server.

1. On the log in screen, click “Upload a CSV-APR or CSV-CAPER to generate a paper report”.

2. Select the type of report to be tested.



3. Follow the on-screen instructions to upload the CSV.
    b. Download the CSV-APR or CSV-CAPER from the HMIS or comparable database and save it to the computer, making sure it is in in a place that is easy to find.
    c. Click the Choose File button. The computer's file directory will appear. Find the CSV Report that was saved and double click on it.
    d. Check the box next to "I am not a Robot" and complete the verification steps if necessary.
    e. Click on the “Upload and Test" button to upload the file from the computer to ***Sage.***
    f. A results message will show:
        1. If there are no errors in the file, ***Sage*** will provide a mes*sage* that the CSV passed. Click the "Create Report" button and ***Sage*** will produce a printable version of the report.
        2. If there are errors, then errors will need to be fixed in the HMIS or Comparable Database by the vendor or HMIS system administrator.

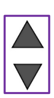
Status Definitions

The following are Status Setting which define the status, or stage of submission, of the APRs and CAPERs:

Status	Status Definition
Accepted	The APR or CAPER has been reviewed by the CPD Representative and approved by the CPD Director. All work on this APR or CAPER is complete. The APR or CAPER locked and may not be changed.
Already Submitted in e-snaps	Indicates the APR was filed in e-snaps.
Awaiting Director Review	The CPD Representative has reviewed the APR and is recommending approval to the CPD Director.
e-snaps data received, no LOCCS data received yet	The grant information from e-snaps has been loaded into ***Sage*** for the APR, but no data is being received by ***Sage*** from LOCCS. This is either because the operating year has not yet begun, or no funds have been drawn from LOCCS, or the data is not yet prepared by HUD for transfer to ***Sage***.
In Progress	The recipient has opened the APR or CAPER and saved at least one form, thereby beginning the submission process.
Not Started	The operating year has ended, and the recipient has not begun any work on the APR or CAPER in ***Sage***.
Operating start date set in LOCCS, year not finished yet	The grant information from both e-snaps and LOCCS are transferring into ***Sage***. The operating year, as indicated in LOCCS by the operating start date plus the term in months, has not yet ended.
Rejected	The CPD Representative has returned the APR or CAPER to the recipient because the submission was incomplete or incorrect. The APR or CAPER is moved back to the "In Progress" section of the dashboard and is unlocked and may be corrected.
Submitted	The recipient has completed the APR or CAPER and submitted it to the HUD Field Office. The APR or CAPER is locked, and no further changes may be made to it unless it is rejected by the HUD Field Office and returned to the recipient.
Terminated and Consolidated	Indicates the grant was consolidated into another grant (the surviving grant) and this grant was terminated in that process.

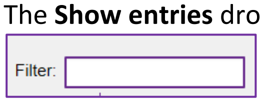
To view all submission statuses of an individual APR or CAPER, **VIEW** the Submission Status on the Submission Launchpad.

The tables in ***Sage*** have a variety of functions to assist in searching and sorting the information on the tables.

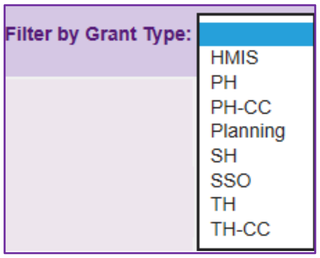


On the right side of each column title, use the **triangle symbol** to sort the list alphabetically or numerically by the information in that column.

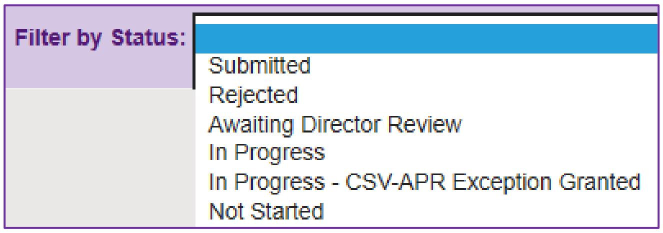
The **Show entries** dropdown enables you to select the list size that appears on the screen.



The **Filter box** allows the user to search for, and navigate to, a term (name or number) appearing on the list.



The Filter by Grant Type provides a drop-down list of the types of grants funded by the entity.



The Filter by Status allows you to filter based on the current status of the APR or CAPER.

The **function keys** enable the list to be exported to Excel, or to copy the current page to a clipboard, to use in Word or Excel.

Common Terms used in Reporting

Active client–a person who received services from a specific project in a given date range. If the client has a project entry date that is before or equal to the operating year start date AND has either not exited the project or exited after the report start date, they are included in the report. This is consistent with Method 1 for defining Active Clients according to the HMIS Standard Reporting Terminology Glossary.

Adult–a person age 18 and older.

Annual assessment–a specialized subset of the 'update' collection point. The annual assessment is to be recorded no more than 30 days before or after the anniversary of the person's project entry date, regardless of the date of the most recent 'update' or 'annual assessment' if it was collected in the year. To be considered reportable to HUD as an annual assessment, data must be stored with a *Data Collection Stage* of 'annual assessment' in the database.

Child–a person under age 18.

Chronically homeless individual–a person who:

1. Is homeless and lives in a place not meant for human habitation, a Safe Haven, or in an emergency shelter; and
2. Has been homeless and living or residing in a place not meant for human habitation, a Safe Haven, or in an emergency shelter continuously for at least 1 year or on at least four separate occasions in the last 3 years where the combined length of time homeless in those occasions is at least 12 months; and
3. Has a qualifying disability.

Comparable database–A comparable database is a relational database that meets all HMIS Data Standards and does so in a method that protects the safety and privacy of the survivor. A comparable database is used by a victim service provider, as defined by the Violence Against Women Act (VAWA), and, in limited circumstances, a legal service provider to collect client-level data and generate unduplicated aggregate reports based on that data. Refer to HUDs "When to Use a Comparable Database" decision tree for assistance determining use or for assistance with VSP project set-up.

Comma Separated Value (CSV)–a file format which stores numbers and text from a database in plain text using commas as a separator between fields.

HMIS implementation–the area that is participating in the HMIS. An HMIS implementation includes the CoC(s) that have agreed to support one HMIS software or regularly utilize data integration to combine data from multiple HMIS software's with the primary HMIS software.

Household without children–a household composed of only adults.

Household with children and adults–a household with at least one adult and one child present regardless of whether the child(ren) is present for the full project stay.

Households with only children–a household composed of only persons that are under age 18.

Leaver–a person who exited the project (one or more times) and is not active on the last day of the operating year.

Program component–a characterization of a project based on how a program operates and is often impacted by how the project is funded. Each recipient applied for a specific type of grant (or component). Examples of program component types are Permanent Housing (PH), Transitional Housing (TH), or Supportive Services Only (SSO).

Recipient–an entity that was awarded the grant for which the APR or CAPER is being submitted.

Stayer–a person who is still enrolled in the project on the last day of the reporting period. Stayers include persons who have previously exited the project and have re-entered the project as long as they were active on the last day of the reporting period.

Unknown household type–a household that cannot be classified because one or more persons are missing the dates of birth. However, when the households already have at least one known adult and one known child, the household type will be categorized as a Household with Children and Adults.

Victim service provider–a private nonprofit organization whose primary mission is to provide services to victims of domestic violence, dating violence, sexual assault, or stalking. This term includes rape crisis centers, battered women's shelters, domestic violence transitional housing programs, and other programs.

Veteran–a person who served on active duty in the armed forces of the United States. This includes Reserves and National Guard members who were called up to active duty.

Youth–a person under age 25.

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