Running an ESG CAPER report

At the top right hand side of your screen, make sure you **Enter Data As** and select the project you wish to run the report for



On the left hand side click on **Reports**, and then under Provider Reports, click on the **ESG CAPER**



If you selected your project using Enter Data As, it should auto-populate, and you will be able to select your **Program Date Range** and your **Entry/Exit Type** and Click **Build Report.** *\*Remember your CAPER reporting period runs from the previous year of July 1 to the current year of June 30th.*

The ESG CAPER report now has a **Report Run History** feature. This allows you to run your report as normal for each report and when you click “Build Report” it will move up into the **Report Run History** panel and show the status of the report.

You can also add in a Name to your report so you can easily reference it later, but it is not required.

Once the report finishes running it will show as “Completed” you can hit the refresh button or navigate away from the screen and the report will still be shown on the Report Run History panel.

To view the report, click on the magnifying glass icon and it will show you your prompts and results of your report.



Reviewing your ESG CAPER

Once your report runs, please take a few moments to review your data for Data Quality and Data Accuracy.

Paying close attention to the following highlighted fields as well as any area that has a **Data not Collected** section**,** if you have anything other than 0’s on these then you need to take a look at the data and see why that information is **“missing”, “client doesn’t know”, or “refused”,** you may have to provide clarification if you are unable to fix these errors.





Downloading the CSV zip file

Once your report has been ran and reviewed click the **Download** button (as shown below)



Your download will appear at the bottom, of your screen or in your downloads folder on your computer (depending on your Internet browser). Save and re-name your CSV file to the project name that you are submitting for.

Test run a report

Prior to submitting to KHC, we ask that you test run your report on Sage’s website. [www.sagehmis.info](http://www.sagehmis.info) *(you do not need an account to use this feature)*



You will then select which report you are uploading whether it be a COC APR or CAPER report



Choose your file and upload and test



If the CSV report does not pass validation errors, please submit a [Help Desk ticket](https://kyhmis.zendesk.com/hc/en-us/requests/new) or email Kayla Sexton at ksexton@kyhousing.org

\*For instructions on how to submit your ESG CAPER, please visit the HCA Help Desk and locate the [“Instructions for submitting your ESG Caper"](https://kyhmis.zendesk.com/hc/en-us/articles/360041718733-Instructions-for-Submitting-ESG-CAPER) document.