

System Agency Admin Call

6/6/18

Present: Jon, *Janet CNCAP, Ciara CAPLS, Anita SENCA, Bonnie NCAP, Kristin and Ryan from BVCA, Tammy and Sara from MID, Krista NENCAP

*Recorder

Data/ Report Request Form

- Jon must receive 5 days prior to date report is needed
- Do not have to list all providers – can put “All my Head Start Providers”
- Let Jon know if the report is for a funder or for internal use. Funder report will be more elaborate. Internal use only reports, Jon can do quicker.
- If the report is for a funder, cc Ashley Frevert (CAN Executive Director) so she is aware of the request.
- If Jon does not respond to your request to let you know he received it, follow up and make sure he confirms receipt. If you do receive confirmation, contact Ashley and make sure Jon is in the office.

CSBG: Module 4 Services

- Jon distributed the Module 4 Service report
- If Jon does not develop your reports for your agency you do not have to do anything the following, but send Jon an email to inform him of your decision to create your own report
- ✓ Agencies are to choose only one or two tabs and fill out a few fields that they report on to start with. Once he confirms that the process is working correctly he will give the go ahead to fill out the rest of the spreadsheet.
- ✓ Spelling and correct codes are IMPORTANT
- ✓ Jon suggested that we run the service report for whichever provider we choose, copy and paste the provider into Jon’s Service report
- ✓ Find the Service you would use, copy and paste that into the excel spreadsheet.
- ✓ Reminder: Spelling and correct codes are important so that Jon can create the report. Copy and paste directly from service point will ensure that spelling and correct codes are Exact.
- ✓ Return to Jon by 6/20/18 if possible. If not Jon needs it by the EOM

Visibility issue

- Jon will distribute to all agencies a report showing them the visibility settings on service point. Review and discuss with Jon any issues or questions
- Whenever Jon makes a change re: agency visibility settings he will send a new report to the agency.

HUD Verify

- If not part of your workflow, you are not required to fill it out
- If agency does not want HUD verify turned on, they can contact Jon to discuss.

SSVF AGENCIES

Present: Jon, *Janet, Ryan, Kristin, Krista

- Jon working on creating DQ report to identify clients showing up as errors in the SSVF upload report
- He will continue to work on this report. Group felt what he accomplished so far was useful
- Janet will go thru the result fields in the upload report, and indicate the ones that we are unable to get from the “easy” SSVF EXPORT QUALITY report. She will send that list out to the other agencies to add or comment before it is submitted to Jon