

LOCAL MONITORING TRAINING

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**Partners Ending
Homelessness**

WHAT WE WILL TALK ABOUT TODAY

- ▶ Documentation
- ▶ Preparing for Monitoring
- ▶ Changes to the site visit
Monitoring Tool
- ▶ Schedule and responsibilities
- ▶ Q & A



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Homelessness



Homeless Definition

CRITERIA FOR DEFINING HOMELESS	Category 1	Literally Homeless	<p>(1) Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning:</p> <ul style="list-style-type: none"> (i) Has a primary nighttime residence that is a public or private place not meant for human habitation; (ii) Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); <u>or</u> (iii) Is exiting an institution where (s)he has resided for 90 days or less <u>and</u> who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution
	Category 2	Imminent Risk of Homelessness	<p>(2) Individual or family who will imminently lose their primary nighttime residence, provided that:</p> <ul style="list-style-type: none"> (i) Residence will be lost within 14 days of the date of application for homeless assistance; (ii) No subsequent residence has been identified; <u>and</u> (iii) The individual or family lacks the resources or support networks needed to obtain other permanent housing
	Category 3	Homeless under other Federal statutes	<p>(3) Unaccompanied youth under 25 years of age, or families with children and youth, who do not otherwise qualify as homeless under this definition, but who:</p> <ul style="list-style-type: none"> (i) Are defined as homeless under the other listed federal statutes; (ii) Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the homeless assistance application; (iii) Have experienced persistent instability as measured by two moves or more during in the preceding 60 days; <u>and</u> (iv) Can be expected to continue in such status for an extended period of time due to special needs or barriers
	Category 4	Fleeing/ Attempting to Flee DV	<p>(4) Any individual or family who:</p> <ul style="list-style-type: none"> (i) Is fleeing, or is attempting to flee, domestic violence; (ii) Has no other residence; <u>and</u> (iii) Lacks the resources or support networks to obtain other permanent housing

Monroe County CoC (NY-500) can service Category 1 and Category 4 only.



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Homeless Definition

RECORDKEEPING REQUIREMENTS



<p>Category 1</p>	<p>Literally Homeless</p>	<ul style="list-style-type: none"> • Written observation by the outreach worker; <u>or</u> • Written referral by another housing or service provider; <u>or</u> • Certification by the individual or head of household seeking assistance stating that (s)he was living on the streets or in shelter; • For individuals exiting an institution—one of the forms of evidence above <u>and</u>: <ul style="list-style-type: none"> ○ discharge paperwork <u>or</u> written/oral referral, <u>or</u> ○ written record of intake worker's due diligence to obtain above evidence <u>and</u> certification by individual that they exited institution
<p>Category 2</p>	<p>Imminent Risk of Homelessness</p>	<ul style="list-style-type: none"> • A court order resulting from an eviction action notifying the individual or family that they must leave; <u>or</u> • For individual and families leaving a hotel or motel—evidence that they lack the financial resources to stay; <u>or</u> • A documented and verified oral statement; <u>and</u> • Certification that no subsequent residence has been identified; <u>and</u> • Self-certification or other written documentation that the individual lack the financial resources and support necessary to obtain permanent housing
<p>Category 3</p>	<p>Homeless under other Federal statutes</p>	<ul style="list-style-type: none"> • Certification by the nonprofit or state or local government that the individual or head of household seeking assistance met the criteria of homelessness under another federal statute; <u>and</u> • Certification of no PH in last 60 days; <u>and</u> • Certification by the individual or head of household, and any available supporting documentation, that (s)he has moved two or more times in the past 60 days; <u>and</u> • Documentation of special needs <u>or</u> 2 or more barriers
<p>Category 4</p>	<p>Fleeing/ Attempting to Flee DV</p>	<ul style="list-style-type: none"> • For victim service providers: <ul style="list-style-type: none"> ○ An oral statement by the individual or head of household seeking assistance which states: they are fleeing; they have no subsequent residence; and they lack resources. Statement must be documented by a self-certification or a certification by the intake worker. • For non-victim service providers: <ul style="list-style-type: none"> ○ Oral statement by the individual or head of household seeking assistance that they are fleeing. This statement is documented by a self-certification or by the caseworker. Where the safety of the individual or family is not jeopardized, the oral statement must be verified; <u>and</u> ○ Certification by the individual or head of household that no subsequent residence has been identified; <u>and</u> ○ Self-certification, or other written documentation, that the individual or family lacks the financial resources and support networks to obtain other permanent housing.



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DEFINING DISABILITY

- ▶ Physical, mental, or emotional impairment which is expected to be of long-continued and indefinite duration, substantially impedes the person's ability to live independently, and is of such nature that such ability could be improved by more suitable housing conditions. Developmental Disability and HIV/AIDS have their own additional defining points

[eCFR :: 24 CFR 582.5 -- Definitions.](#)



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Client file must contain:

- Written verification by a professional who is licensed to diagnose and treat disability. Must include certification that the disabling condition is expected to be long continuing/of indefinite duration, and substantially impedes the individual's ability to live independently; **or**
- Written verification from Social Security Administration **or** receipt of a disability check (SSDI/S, VA); **or**
- Initial observation by intake staff with confirmation by professional no later than 45 days after client is accepted
- If client entered during a waiver period, the file must contain the waiver from HUD.

[eCFR :: 24 CFR 582.301 -- Recordkeeping.](#)

Documenting a Disability



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	Title	DIAGNOSE ADDICTIONS	DIAGNOSE MENTAL HEALTH DISABILITY
Psy.D	Psychiatrist/Psychologist	yes	yes
MD	Medical Doctor	yes	yes
NP	Nurse Practitioner	yes	yes
PA	Physician Assistant	yes	yes
PNP	Psychiatric Nurse Practitioner	yes	yes
PMHN	Psychiatric Mental Health Nurse	yes	yes
APRN	Advance Practice Registered Nurse	yes	yes
RN	Registered Nurse (assignments are directed by MD, etc.)	no	no
LPN	Licensed Practical Nurse (operates under direction of RN, MD, etc.)	no	no
LCSW	Licensed Clinical Social Worker	yes	yes
LMSW	Licensed Master Social Worker (Yes, under supervision of LCSW, MD)	no/yes	no/yes
LMHC	Licensed Mental Health Counselor	yes	yes
BSW	Bachelors Social Worker	no/yes	no
CRC	Certified Rehabilitation Counselor	yes	yes
CASAC	Credentialed Alcohol & Substance Abuse Counselor	yes	no
CATC	Certified Addictions Treatment Counselor	yes	no

Who can sign disability verification:



Disability Verification Form

Tn: _____

RF: _____

_____ SS#: _____ is a HUD (Housing and Urban Development) funded program and therefore requires that each applicant meet established criteria for being disabled. U.S. Departments of Housing and Urban Development (HUD) regulations establish criteria which must be met for an applicant to be determined (based on disabled or handicapped status) eligible.

- Has a disability, as defined in Section 223 of the Social Security Act [42 USC 423] defines disability as (Written verification from the social Security Administration) (1) :
 - o "Inability to engage in any substantial, gainful activity by reason of any medical determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months," or
 - o "In the case of an individual who attained the age of 55 and is blind and unable by reason of such blindness to engage in substantial, gainful activity requiring skills or ability comparable to those of any gainful activity in which he has previously engaged with some regularity and over a substantial period of time."
 - o Receipt of disability check (Social Security disability Insurance check or Veterans Disability Compensation)
- Is determined, pursuant to HUD regulations, to have a physical, mental, or emotional impairment that:
 - o Is expected to be of long-continued and indefinite durations (2);
 - o Substantially impedes his or her ability to live independently; and
 - o Is of such a nature that the ability to live independently could be improved by more suitable housing conditions;(3) or
- Has a developmental disability as defined in 42 U.S.C. 6001. Section 102(7) of the Developmental Disabilities Assistance and Bill of Rights Act [42 U.S.C. 6001(7)] defines developmental disability in functional terms as: "Severe chronic disability that:
 - o Is attributable to a mental or physical impairment or combination of mental and physical impairments;
 - o Is manifested before the person attains age 22;
 - o Is likely to continue indefinitely;
 - o Results in substantial functional limitation in three or more of the following areas of major life activity (1) self-care, (2) receptive and responsive language, (3) learning, (4) mobility, (5) self-direction, (6) capacity for independent living, and (7) economic self-sufficiency; and
 - o Reflects the person's need for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are of lifelong or extended duration and are individually planned and coordinated."
- Intake staff --recorded observation for disability that No later than 45 days of the application for assistance is confirmed and accompanied by evidence. (4)
 - o Intake date _____
- Other: _____

HUD's definition does not exclude persons who have the disease of acquired immunodeficiency syndrome or any conditions arising from the etiologic agent for acquired immunodeficiency syndromes.

I certify that to the best of my knowledge and belief the above information is correct.

(Print Name)

(Date)

(Signature)

(Title of physician or other licensed health professional)

(Address)

(Phone Number)

1. FN - 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (3)
2. FN - 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (1)
3. FN - 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (2)
4. FN - 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (4)

Disability Verification Form



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DOCUMENTATION:

- ▶ Upon intake

- ▶ Homeless Verification
- ▶ Household Composition

- ▶ After the client has been housed (or sooner)

- ▶ Photo ID-Head of Household only
- ▶ Copy of Social Security Card for each household member
- ▶ Birth Certificate for each household member
- ▶ Lease Information-name on lease matches Head of Household
- ▶ Disability Verification (if entered during the HUD waiver period, must have a waiver in folder)



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CASE MANAGER REQUIREMENTS:

- PSH—Per HUD regulations, the CM must provide case management; there is no requirement on the regularity of the service. The community standard is that contact with the client should be at least once a month or more, based on the client's necessity for supportive services, and at least quarterly at the unit.
- RRH—In strict adherence to HUD regulations, the case manager is required to meet with the client at least once per month as long as the client is enrolled in the RRH project. This commitment to regulatory compliance ensures the security and effectiveness of our RRH projects.



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PREPARING FOR MONITORING:

- ▶ As key participants in the CoC program, it's crucial that the recipients and sub-recipients are well-versed in the program's requirements, especially if any areas of improvement have been highlighted in previous monitoring reports.
- ▶ The Monitoring team will review the following before the site visit:
 - APR in SAGE for projects ending in 2026
 - ***This data comes from the PARTICIPANTS DATA THAT CASE MANAGERS IN YOUR PROJECT PUT INTO HMIS!***



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PREPARING FOR MONITORING Continued:

- ▶ The following materials for reviewers will be required **a week before the site visit (so please choose monitor date accordingly):**
- ▶ Current to date active rent roll or program roster
- ▶ List of clients who entered from Coordinated Entry
- ▶ List of clients who exited the program within the program year-ending in 2026
- ▶ List of active HMIS users for your program
- ▶ The following only needs to be sent or given to the team once (can be given before or during the site visit):
 - ▶ A copy of the program's policies that cover requested policies and procedures referenced in the monitoring checklist.
 - ▶ A written copy of finance policies and procedures, as well as a copy of a recent audit statement



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PREPARING FOR MONITORING Continued:

- ▶ The following will be reviewed at the time of the site visit:
- ▶ The file review process is a crucial part of our operations. We will review at least four total, or 10% of the caseload files, from the start of the program to the date of monitoring.
- ▶ **If items on the next slide are not successfully given to the monitoring team during the first site visit, it will result in a “No” for the monitoring question, “Was the Project prepared for the site visit?” This includes the clients’ files requested and timely SAGE Apr Submission.**



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FILE SELECTION AND SAMPLING:

PEH Staff will email the project 24-hours before the site visit (please choose monitor date accordingly) with a list of files we would like to review. Please ensure these files are ready for review during the site visit. (File selection will be made using a random selection)

Reviewers will consider the following factors when determining the specific files that will comprise the review sample:

- A. 10% of files, or a minimum of 4, are chosen randomly from participants enrolled or exited during the project year. If there are not enough eligible files from participants who were enrolled for at least three months during the project year, additional files will be requested from participants enrolled before the project year under review. To ensure random selection, each qualifying file is assigned a unique number (from 1 up to the total number of files). These numbers are then input into a random number picker app. The numbers selected by the app determine which files are chosen-the files corresponding to those selected numbers are the final selections. Files found deficient in the previous monitor are requested again the next year, unless exited prior to the previous year's monitor date.



FILE SELECTION AND SAMPLING Continued:

B. The reviewers will consider adding more files to this selection to include a file or files from each staff person working in the respective program area being monitored. *Expand the sample, if necessary, to include additional files with the same characteristics if indicated by the severity or nature of any problem(s) noted during the initial selection's review such as the same problem category, the same staff person, the same activities, or other characteristics. This expanded sampling aids in determining whether issues are isolated events or represent a systemic concern.*

C. Reviewers will also review subrecipient files.



Monitoring Form Online

[Link here](#)



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Monitor Title Page



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277 Alexander St., Suite 208-210, Rochester, NY 14607 Phone: 585-319-5091 Fax: 585-319-5488

Agency Name:	
Program Name:	
Grant Identification #	
Fiscal Year (FY):	FY 2024
Operating Year:	
The number of HUD Units:	
The number of HUD Beds:	
Program Type:	
Grant Amount Total:	\$0.00
Leasing	\$0.00
Rental Assistance	\$0.00
Operations	\$0.00
Support Services	\$0.00
HMIS	\$0.00
Administration	\$0.00
Agency Representative(s) at review	
Review Date:	
Monitoring team at review:	
Total Score	0

-->No significant changes. Added FY and PEH contact information.



New Tab: References



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References:**CoC Interim Rule:**

[eCFR :: 24 CFR Part 578 -- Continuum of Care Program](#)

HMIS Specific:

[eCFR :: 24 CFR Part 578 -- Continuum of Care Program](#)

<https://www.ecfr.gov/current/title-24/subtitle-B/chapter-V/subchapter-C/part-578?toc=1>

[2004 HMIS Data and Technical Standards Final Notice](#)

[Coordinated Entry Management and Data Guide \(Chapter 2\)](#)

Information and Documentation:

[eCFR :: 24 CFR Part 578 -- Continuum of Care Program](#)

Finances:

[eCFR :: 24 CFR Part 576 -- Emergency Solutions Grants Program](#)

[eCFR :: 24 CFR Part 85 -- Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments](#)

Folder Review:

[eCFR :: 24 CFR Part 5 -- General HUD Program Requirements; Waivers](#)

[eCFR :: 24 CFR Part 576 -- Emergency Solutions Grants Program](#)

[eCFR :: 24 CFR Part 578 -- Continuum of Care Program](#)

Client CM Review:

[eCFR :: 24 CFR 578.37 -- Program components and uses of assistance.](#)

Subpart E High-Performing Communities

§ 578.65 Standards.

§ 578.67 Publication of application.

§ 578.69 Cooperation among entities.

§ 578.71 HPC-eligible activities.

Please note that questions highlighted in red are scored as follows:

- If the answer is "No," a negative score is given, and the specified amount will be deducted from the total score.

- If the answer is "Yes," a zero score is given, and no points will be lost.



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Assessment HMIS



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Homelessness

HMIS Privacy/Security:			Project's Score	Scoring
<i>Questions in Blue are not scored in 2026.</i>				
1	HMIS Participation Consumer Notice is posted in a conspicuous location.			Yes= 0 No=-1
2	Has the program attended a new or refresher HMIS training this past year?			Yes= 2 No= 0
Section Total:			0	Max Score = 2 Min Score = -1
COC Policy Binder :				
1	Agency policy for client privacy in HMIS - Policy should include a description of participant's rights, participant's options, the agency's responsibility to protect PPI/PHI*, and how agency will use and disclose a participant's information. See 2004 HMIS Data and Technical Standards Final Notice and Coordinated Entry Management and Data Guide (Chapter 2) (links below)			Yes= 0 No=-1
2	The agency has a documented process to ensure that first and last names are correctly spelled and that the DOB is accurate. Are all staff informed?			Yes= 0 No=-1
3	Agency procedure with an organized exit process includes proper communication of the discharged destination in the file. [24 CFR 578.91]			Yes= 0 No=-1
4	both physical records and electronic data. Policies should detail safeguards in place to protect the confidentiality of clients' personally identifiable information, record-retention requirements, and			Yes= 0 No=-1
5	Project HMIS user list matches the list in HMIS 100% within 72-hours of site visit.	Yes	0	Yes= 0 No=-1
Section Total:			0	Max Score = 0 Min Score = -4 (-5 in 2027)

--> Changes: A question was added under CoC Policy Binder to ensure we have the most up to date information regarding HMIS Users.

The new question will be answered this year so that you are aware of where you are, but it will not be scored until 2027.

Notice we lightened the green (and red) so that they are easier to read.

Client Consent and Release of Information (ROI)			
1	Is the agency using the current HMIS ROI plus Addendum (dated 4/8/2028 or later) ?		Yes= 0 No=-1
2	The Agency has a written policy for all clients to confirm homelessness. [24 CFR 578.103 (a)(3),(4),(6)]		Yes= 0 No=-3
3	The Agency has a written policy for documenting client disability. [24 CFR 578.23]		Yes= 0 No=-3
4	A policy states: Person(s) with lived experience are on the Board of Directors or involved in other policy-making groups. [24 CFR 578.75 (g)(1)]		Yes= 0 No=-1
5	The program has a formal procedure in place for terminating assistance to participants. [24 CFR 578.91]		Yes= 0 No=-1
6	A policy states that participants are not required to participate in inherently religious activities. [24 CFR 5.109(e)]		Yes= 0 No=-1
7	A policy states that participants cannot be denied benefits/services based on religion. [24 CFR 578.93 (c)]		Yes= 0 No=-1
8	A policy/procedure identifies a staff person designated as an educational liaison that will ensure children are enrolled in school, connected to Head Start, Part C of the Disabilities Act. [24 CFR 578.23(c)(5)]		Yes= 0 No=-1
9	A policy that states the age and gender of a child under age 18 is not used as a basis for denying any family's admission to the program. [24 CFR 578.93(e)]		Yes= 0 No=-1
10	Is there evidence that the recipient has implemented procedures to ensure availability of information on the existence and locations of facilities and services accessible to persons with disabilities?" [24 CFR 578.93(d)]		Yes= 0 No=-1
11	Does the recipient have written policies to comply with non-discrimination, Equal Opportunity & Fair Housing regulations in providing services? [24 CFR (578.93)]		Yes= 0 No=-1
12	The agency has a procedure for file reviews, action plans, and a timeline for correcting file deficiencies.		Yes= 0 No=-1
Section Total:		0	Max Score = 0 Min Score = -16
Page Total		0	Page Max Score = 2 Min Score = -21

-->No changes made to this section.

References:

HMIS Specific:

eCFF :: 24 CFR Part 578 – Continuum of Care Program

<https://www.ecfr.gov/coument/title-24/subtitle-B/chapter-V/subchapter-C/part-578>

2004 HMIS Data and Technical Standards Final Notice

Coordinated Entry Management and Data Guide (Chapter 2)

Notes about this monitor:

-->Changes: Added links to references for this area of the monitor onto the tab.

We also added a box for notes on each tab.



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Assessment HMIS Part 2



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HMIS Data Intake and Exit :			
	<i>Questions in Blue are not scored in 2026.</i>	Project's Score	Scoring
1	Using the paper HMIS intake data collection forms which align with the 2026 Data Standards intake form.		Yes= 0 No=-1
2	The agency is actively monitoring program participation entries of clients. 80% of entries for all household members are completed in HMIS within 72 hours.		Yes= 0 No=-1
	The agency is actively monitoring program participation <i>exits</i> of clients. 80% of <i>exits</i> for all household members are completed in HMIS within 72 hours. * (for 2026 this will be a zero for everyone, but we will mark yes/no and give you your percentage for your reference)	0	Yes= 0 No=-1
3	There is congruity between the case record responses based on the applicable homeless definition. (Is the client homeless? Has housing status and prior living situation been completed appropriately?)		Yes= 0 No=-1
4	Income, non-cash benefits, and health insurance are updated at least annually and at exit.		Yes= 0 No=-1
4A	90% of discharge destination data is appropriately entered into HMIS on the Exit screen with the Notes section completed. You must have a brief note in the "Notes" box summarizing the reason for the client's exit and destination.		Yes= 2 No= 0
5	HMIS active client list matches the Project's active client list 100% (within 72 hours before the site visit)		Yes= 2 No= 0
6	APR 6d Chronic Homelessness (2 pts for all 0's/0% - not including the Count of total records column)		Yes= 2 No= 0
Section Total:		0	Max Score = 6 Min Score = -4 (Min Score=-5 in 2027)

-->Change: As discussed at monthly meetings a question has been added here regarding *exits*. This question will be answered, but not scored for 2026.



APR 6a to 6c (1 pt for each 0%)			
6a DQ Personally Identifiable Information			Scoring
1	Name		Yes= 1 No= 0
2	Social Security Number (At least last 4 digits)		Yes= 1 No= 0
3	Date of Birth		Yes= 1 No= 0
4	Race and Ethnicity		Yes= 1 No= 0
Section Total:			0 Max Score = 4 Min Score = 0
6b Universal Data Elements (5 pts)			
1	Veterans Status		Yes= 1 No= 0
2	Project Start Date		Yes= 1 No= 0
3	Relationship to Head of Household		Yes= 1 No= 0
4	Enrollment CoC (NY-500)		Yes= 1 No= 0
5	Disabling Condition		Yes= 1 No= 0
Section Total:			0 Max Score = 5 Min Score = 0
6c Income & Housing Data Quality (4 pts)			
	Destination		Yes= 1 No= 0
	Income & Sources at Start		Yes= 1 No= 0
	Income & Sources at Annual Assessment		Yes= 1 No= 0
	Income & Sources at Exit		Yes= 1 No= 0
Section Total:			0 Max Score = 4 Min Score = 0

-->No changes made to these questions.



				Min Score = 0
32	13a2, b2, c2 Number of Physical and Mental Health Conditions			
33	1	13a2 - Number of Conditions at Start		
34	1A	Condition Unknown = 0	0	Yes= 1 No= 0
35	1A	Client Doesn't Know/Client Prefers Not to Answer = 0	0	Yes= 1 No= 0
36	1B	Data Not Collected = 0	0	Yes= 1 No= 0
37	13b2 - Number of Conditions at Exit			
38	1	13b2 - Number of Conditions at Exit		
39	1A	Condition Unknown = 0	0	Yes= 1 No= 0
40	1A	Client Doesn't Know/Client Prefers Not to Answer = 0	0	Yes= 1 No= 0
41	1B	Data Not Collected = 0	0	Yes= 1 No= 0
42	13c2 - Number of Conditions for Stayers			
43	1	13c2 - Number of Conditions for Stayers		
44	1A	Condition Unknown = 0	0	Yes= 1 No= 0
45	1A	Client Doesn't Know/Client Prefers Not to Answer = 0	0	Yes= 1 No= 0
46	1B	Data Not Collected = 0	0	Yes= 1 No= 0
47	Section Total:			Max Score = 9 Min Score = 0 in 2027
48	14a, 14b - Domestic Violence, Sexual Assault, Dating Violence, Stalking or Human Trafficking			
49	1	14a - History of Domestic Violence, Sexual Assault, Dating Violence, Stalking, or Human Trafficking		
50	1A	Client Doesn't Know/Client Prefers Not to Answer = 0	0	Yes= 1 No= 0
51	1B	Data Not Collected = 0	0	Yes= 1 No= 0
52	14b - Most recent experience of domestic violence, sexual assault, dating violence, stalking, or human trafficking			
53	1	14b - Most recent experience of domestic violence, sexual assault, dating violence, stalking, or human trafficking		
54	1A	Client Doesn't Know/Client Prefers Not to Answer = 0	0	Yes= 1 No= 0
55	1B	Data Not Collected = 0	0	Yes= 1 No= 0
56	Section Total:			Max Score = 4 Min Score = 0 in 2027
57	Section Total:			

-->Changes: These questions are new to the monitor but have been discussed regularly at monthly meetings. As with other new questions they will not be scored this year, but they will be answered so that you know where you are. .



20b Non-Cash Benefits (4 pts) & 21 Health Insurance (6 pts) 20b & 21 (1 pt for each if the client doesn't know & data not collected = 0)			
1	Non-cash benefit sources - Client doesn't know/Client prefers not to answer		
1A	Start		Yes= 1 No= 0
1B	Exit		Yes= 1 No= 0
1	Non-cash benefit sources - Data not collected		
1A	Start		Yes= 1 No= 0
1B	Exit		Yes= 1 No= 0
2	Health Insurance - Client doesn't know/Client prefers not to answer		
2A	Start		Yes= 1 No= 0
2B	Annual		Yes= 1 No= 0
2C	Exit		Yes= 1 No= 0
3	Health Insurance - Data not collected		
3A	Start		Yes= 1 No= 0
3B	Annual		Yes= 1 No= 0
3B	Exit		Yes= 1 No= 0
Section Total:		0	Max Score = 10 Min Score = 0
Page Total		0	Page Max Score = 29 (42 in 2027) Min Score = -4 (-5 in 2027)

-->No changes made to these questions.

Coordinated Entry (CE)



Partners Ending
Homelessness

CE	Coordinated Entry			Project's Score	Scoring
1	Have 100% of Head of Households have entered the program via the prioritization list?	%			Yes= 0 No=-1
2	Do 75% of clients referred from the prioritization list to the Project have entry dates?	%			Yes= 0 No=-1
3	100% of clients have a prioritization list referral follow-up note in the client's HMIS file within 14 days of referral.	%			Yes= 0 No=-1
4	The average time from referral to project entry is 14 days, regardless of RRH or PSH	Days			Yes= 2 No= 0
5	The average number of days from program entry to housed (PSH within 45 days, RRH within 30 days) *	Days			Yes= 2 No= 0
6	Less than 20% of participants that have entered the project from the prioritization list have been exited without being housed.	%			Yes= 2 No= 0
7	Less than 10% of clients referred from the prioritization list to the Project have rejected this Project.	%			Yes= 3 No= 0
8	Less than 10% of this Project's referrals from the prioritization list have rejected the client.	%			Yes= 3 No= 0
Section Total:				0	Max Score = 12 Min Score = -3
Page Total				0	Page Max Score = 12 Min Score = -3
Possible points (+12 -3) Section Point totals					

-->No changes were made to this section

Information and Documentation



Partners Ending
Homelessness

Information / Documentation				Project's Score	Scoring (Points)
1	Utilization rate of in-project? (Units)	Amount of Units Funded	Average Amount Utilized	Average Unit Utilization Rate to Date	-8 to 5 points
		0	January Households	#DIV/0!	
	100% (5 points)		0		
	99%- 95% (3 points)		April Households		
	94%-90% (1 points)		0		
	89% - 80% (-3 point)		July Households		
	79% and below (- 8 points)		0		
			October Households		
			0		
2	Is a lead-based paint certificate on file for projects working with family files (24 CFR 578.99)				Yes= 0 No=-1
3	Supportive Housing Assessments	Number of Heads of Household	Number of Completed Supportive Housing Assessments		
	Percentage of housing assessment completed during project year (the number of completed assessments divided by the number of clients equals 95%)	0	0	#DIV/0!	Yes= 2 No= 0
3A	All Clients that have been in the Project for over a year have an updated housing assessment completed during the project year (the number of completed assessments divided by the number of clients with a year plus in the projects equals 95%)	0	0	#DIV/0!	Yes= 2 No= 0
4	Acuity Index (24 CFR 578.37)	Number of Heads of Household	Number of Completed Acuity Index		Bonus Points
	Percentage of Acuity Index completed during project year (the number of completed Acuity Index divided by the number of clients equals 95%)	0	0	#DIV/0!	Yes= 2 No= 0
4A	All Clients that have been in the Project for over a year have an updated acuity index completed during the project year (the number of completed assessments divided by the number of clients with a year plus in the projects equals 95%)	0	0	#DIV/0!	Yes= 2 No= 0
	Total:			0	Max Score = 11 Min Score = -9
	Acuity Index Bonus Total:	101%-110%=-1 111%-119%=-2 120%+ =3		0	Max Score = 6 Min Score = -6
Page Total				0	Page Max Score = 11 Min Score = -9

-->No changes were made to this section.

Proposed Bed and Unit Inventory

The number of beds and units shown here come from the grant application as it was submitted in e-shops. This information is not able to be edited by the Recipient or the CPD Representative. These represent the number of beds/units funded under the award unless amended post-award.

Total Number of Year Round Beds/Units from Application

Total Units	27
Total Beds	50
Total Dedicated CH Beds	0
Total Non-Dedicated CH Beds	50



PIT Actual Bed and Unit Utilization

The numbers here are reported by the recipient and are to reflect the number of beds and units that were **occupied and available for occupancy** on the last Wednesday of the appropriate month. The chart is comparing the number of beds and units the recipient proposed to the number the recipient had actually occupied and/or were available.

- Occupied means a unit which has persons residing within the unit. [Count each unit and bed occupied.]
- Available for occupancy means a unit which is "readily available" to be occupied. That is one where 1) in a site-based project the unit included in the grant is vacant AND 2) in a scattered-site project readily available includes all leasing subsidies which are available but which a client has not rented with yet and any units which will be rented with funds available (i.e. those above the number of units awarded in the grant based on funding availability.)

The application number and the occupancy number may legitimately differ for reasons. For example - the project may show fewer beds and units available because the project had a slow start-up or a unit was being rehabilitated, or the project may show more beds and units available by correctly reporting availability based on the amount of leasing funds available on the last Wednesday of any given quarter (scattered-site housing only).

Units from the Point in Time Count

Point-in-Time Utilization on the Last Wednesday (Quarterly)	As Proposed in the Application	Occupied AND Available for Occupancy As Completed in the APR by the Recipient				Average % of Actually Available to Proposed
		January	April	July	October	
Units	27	24	23	25	26	90.74%
Beds	50	57	50	58	61	113.00%



Explanation, as necessary

If the number of beds and units proposed is different from the number actually available on the last Wednesday of each month please explain why:

Being a leasing project, each time a tenant vacates a property the units need to be re-released to new tenants. The program is actively working on developing ways to reduce

Utilization is based on quarterly PIT counts that are reported on your SAGE APR.



Finances



Partners Ending
Homelessness

Finances

Drawdown of Funds	Amount of Funds Requested	Amount of Funds Spent		Project's Score	Point Value
100% (11 points) 99%- 95% (5 points) 94%-90% (-1 points) 89% - 80% (-3 point) 79% and below (- 5 points)	\$0.00	\$0.00		#DIV/0!	Max Score = 11 Min Score = -5

-->No changes were made to this section.



Partners Ending Homelessness

Grant Information

For submission dated

7/1/2024 - 6/30/2025

CoC Number and Name NY-500 Rochester, Irondequoit, Greece/Monroe County CoC
 Field Office HUD Field Office - Buffalo
 Component Type [Redacted]

LOCCS Dates	Grant-specific fields
Operating Period Start Date	7/1/2024
Operating Period End Date	6/30/2025
Year of Reporting	1
Grant Term in Months	12
Date of the transmission of the last change to eLOCCS data for this grant	1/20/2026
LOCCS Latest Disbursement Date	7/31/2025

LOCCS Financial Information	eSNAPS Amount Awarded	
Grant – Total Disbursed by Date Shown Above	233,772.95	Grant – Contracted Award Amount 252,622.00
Renovation/New Construction	0	Renovation/New Construction 0
Services	212,520.86	Services 229,656.00
HMIS	0	HMIS 0
Leasing	0	Leasing 0
Rental assistance	0	Rental assistance 0
Operating	0	Operating 0
VAWA	0	VAWA 0
Rural	0	Rural 0
Admin	21,252.09	Admin 22,966.00

Percentage of funds spent is based on the difference between amount requested and amount drawn down. Your SAGE APR is used for this.



Financial Documentation			Project's Score	Scoring
1	Grantee has written procedures covering the recording of transactions, an accounting manual and a chart of accounts? (If yes, attach a copy to this Exhibit, if feasible) (-1)			Yes= 0 No= -1
2	If the grantee has written policy Manual: does it provide guidelines for controlling expenditures, such as purchasing requirements and travel authorizations? (-1 Point) [24 CFR 576.57 (b); 24 CFR 85.2]			Yes= 0 No= -1
3	Grantee has written procedures regarding the maintenance of accounting records for the required number of years? (-1 Point) [24 CFR 576.57 (b); 24 CFR 85.20]			Yes= 0 No= -1
4	Grantee's fiscal records and valuables are secured in a limited-access area?(-1) [24 CFR 576.57 (b); 24 CFR 85.20]			Yes= 0 No= -1
5	Evidence that staff duties are separated so no one individual has complete authority over an entire financial transaction? (-1 Point) [24 CFR 576.57 (b); 24 CFR 85.20]			Yes= 0 No= -1
6	Grantee has written policies for procurement. (If the Agency has written policies, obtain copy for the files; otherwise, describe the Agency's policy (-1 Point).			Yes= 0 No= -1
7	Has the grantee developed standards for avoiding conflict of interest in carrying out activities funded by federal grants dollars? (-1 Point)			Yes= 0 No= -1
8	Employees are required to sign a statement indicating that they have read the policy and will comply? (If yes, obtain copy for the files, otherwise, describe the Agency's policy.) (-1 Point)			Yes= 0 No= -1
9	A copy of most recent audited financial statement has been reviewed. (-1 Point)			Yes= 0 No= -1
Section Total:			0	Max Score= 0 Min Score= -9
Page Total			0	Max Score = 11 Min Score = -14

-->No changes were made to this section

Project Outcomes



Partners Ending
Homelessness

Project Outcomes

	Project % (APR FY 2024)	Community Benchmarks	All CoC% for Project APR year	All PSH/RRH/TH % For Project APR Year	Total Points
Participants exit to or remain in permanent Housing (2 points for each % reached or at or above)	0%	93%	0%	0%	0
Participants have employment income in the program year (1 point for each % reached or at or above)	0%	20%	0%	0%	0
Participants have non-employment income in the program year (1 point for each % reached or at or above)	0%	40%	0%	0%	0
Participants with no income (2 points for each % reached or at or below)	0%	15%	0%	0%	0
Participants have obtained non-cash benefits (2 points for each % reached or at or above)	0%	85%	0%	0%	0
Participants have health insurance (2 points for each % reached or at or above)	0%	90%	0%	0%	0
Participants increase employment income (1 point for each % reached or at or above)	0%	20%	0%	0%	0
Participants increased non-employment income in the program year (1 point for each % reached or at or above)	0%	45%	0%	0%	0
Participants exited with an increase of non-employment income (1 point for each % reached or at or above) (Full points awarded if there are no exits during the project year.)	0%	50%	0%	0%	0

Section 1 points are based on the associated project outcome being at or above each column to the right (community benchmarks, CoC, and project type). Some questions are worth up to an additional 3 points (1 point per column at or above), while others are worth up to an additional six points (2 points per column at or above) with the exception of outcome 4 which is at or below each column.

Points for Section 1

0

APR 2024 - 20
APR 2024 - 0

-->In this section and year over year section, we updated the explanation of how points are calculated.

*You can find instructions on calculating outcomes here [_____](#). If you have any questions please reach out to us.



Partners Ending Homelessness

	Increase or Decrease from prior year		Community Benchmarks	% increase or decrease	Total Points
	Project % -2023FY	Project % -2024FY			
Participants exit to or remain in permanent Housing.	0%	0%	83%	0%	0
Participants have employment income in the program year.	0%	0%	30%	0%	0
Participants have non-employment income in the program year.	0%	0%	40%	0%	0
Participants with no income	0%	0%	15%	0%	0
Participants have obtained non-cash benefits.	0%	0%	85%	0%	0
Participants have health insurance.	0%	0%	90%	0%	0
Participants increase employment income.	0%	0%	30%	0%	0
Participants' non-employment income increased in the program year.	0%	0%	45%	0%	0
Participants exited with an increase of non-employment income (1 point for each % reached or at or above) (Full points awarded if there are no exits during the project year.)	0%	0%	50%	0%	0
Projects will get 1 point for every 1% increase, with a maximum of 5 points under the community benchmark.					Points for Section 2
Projects will get 1 point taken off for every 1% decrease under the community benchmark, with a maximum of 5 points taken off under the community benchmark.					0
Projects at or above the community benchmark for FY24 will receive 5 points, and projects at or above the community benchmark for FY24 and FY23 will receive two bonus points.					Max Score = 45 Min Score = 10
					Total Points for sections 1 and 2
Page Total					0 Max Score = 100 Min Score = 45

-->Same as above.



Community benchmarks are based on HUD benchmarks along with community achievement. The average for each benchmark has increased incrementally based on where the community has been with the goal of achieving the HUD benchmark. As HUD priorities change the community benchmark changes.

In accordance with HUD's priority of self-sufficiency, for the 2027 monitor year projects will see an increase in expectation for percentage of participants who have employment income to 25%. For the 2028 monitor year projects will see an increase in expectation for the same benchmark to 30%. This will continue until the community can meet the HUD benchmark. In addition, starting in 2027 this benchmark will be weighted more heavily at 2 points per column that the project is at or above. Finally, we will also score increase in employment at annual and exit, as well.

In accordance with HUD's priority of self-sufficiency, for the 2027 monitor year projects will see a decrease in the percentage of participants with no income to 10% and a decrease in non-cash benefits to 80%.

The CoC will continue to monitor community outcomes and make adjustments according to community need and HUD priorities. Providers should be prepared for such changes.

-->Future changes to be aware of.

PIT Participation



Partners Ending
Homelessness

1. What is the percentage of staff at the point in time count? (at minimum)	100% = 5 Points	Percentage of HUD CoC Funding for Program =
o 20% to 30% of total funding = 6 people	90% to 99% = 4 Points	
o 15% to 19% of total funding = 5 people	80% to 89% = 3 Points	
o 10% to 14% of total funding = 4 people	50% to 79% = 0 Points	
o 5% to 9% of total funding = 3 people	0% to 49% = -3 points	
o 2% to 4% of total funding = 2 People		
	Bonus points for over 100% = 3 Points	
		Number of Staff participated in PIT Count =
Participation Percentage		
Participation Points		

-->No changes were made to this section.

Folder Review



Partners Ending
Homelessness

HUD CoC File review Eligibility and Documentation

Number of Case Files Reviewed:

5

Active Clients	Homeless Doc (24 CFR 578.103 & 24 CFR 576.500(b))	Disability Doc (PSH only) (24 CFR 582.301)	Head of Household has received a copy of the Emergency Transfer Policy and VAWA (24 CFR 578.99 & 24 CFR 5.2005(e))	The Client's Name matches the lease	Household composition	Photo ID (head of Household)	SSA Card (for all family members)	Birth Certificate (for all family members) (request receipt will be accepted for the project year of enrollment only)	School Attendance Record (for all school age family members) (24 CFR 578.23(c)(5))	Annual Assessment Income Certification *** (24 CFR 578.77)	Tenant Rent Calculation signed by client (2027 start)***	Annual Lease *** (24 CFR 578.99)	Annual Inspection *** (24 CFR 578.85 (b))
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													

-->Please start collecting head of household signatures on rent calcs.



Partners Ending Homelessness

Number of Case Files Reviewed:		0												
Exited Clients	Homeless Doc (24 CFR 578.103 & 24 CFR 576.500(b))	Disability Doc (PSH only) (24 CFR 578.103)	Head of Household has received a copy of the Emergency Transfer Policy and VAWA (24 CFR 578.99 & 24 CFR 5.2005(e))	The Client's Name matches the lease	Household composition	Photo ID (head of Household)	SSA Card (for all family members)	Birth Certificate (for all family members) (request receipt will be accepted for the project year of enrollment only)	School Attendance Record (for all school age family members) (24 CFR 578.23(c)(5))	Annual Assessment Income Certification *** (24 CFR 578.77)	Tenant Rent Calculation signed by client (2027 start)***	Annual Lease *** (24 CFR 578.99)	Annual Inspection *** (24 CFR 578.85 (b))	For Exited Clients does a review of these client files show that minimum due process requirements were followed for termination? (24 CFR 578.91)
1														
2														
3														
4														

Number of Case Files Reviewed:		0												
Clients with missing documentation from previous year's monitoring check to see if documentation was corrected?	Missing: Homeless Doc (24 CFR 578.103 & 24 CFR 576.500(b))	Missing: Disability Doc (PSH only) (24 CFR 578.103)	Missing: Head of Household has received a copy of the Emergency Transfer Policy and VAWA (24 CFR 578.99 & 24 CFR 5.2005(e))	Missing: The Client's Name matches the lease	Missing: Household Composition	Missing: Photo ID (head of Household)	Missing: SSA Card (for all family members)	Missing: Birth Certificate (for all family members) (request receipt will be accepted for the project year of enrollment only)	Missing: School Attendance Record (for all school age family members) (24 CFR 578.23(c)(5))	Missing: Annual Assessment Income Certification *** (24 CFR 578.77)	Missing: Tenant Rent Calculation signed by client (2027 start)***	Missing: Annual Lease *** (24 CFR 578.99)	Missing: Annual Inspection *** (24 CFR 578.85 (b))	
1														
2														
3														
4														

-->Please start collecting head of household signatures on rent calcs.



Notes about Files

Points for File review		Percentage of Documents Present	0.00%
Page Total	0		

*** For total points, you must have the document for every year the client is housed in the Project. This includes the first year of the client being housed in the Project.

** The file review section will be scored using a sliding scale rubric.

Points will be awarded according to the overall percentage of required documents that were present in the audited files:

100% of documents present	15	points
90-99% of documents present	13	points
80-89% of documents present	11	points
70-79% of documents present	9	points
60-69% of documents present	7	points
50-59% of documents present	5	points
40-49% of documents present	3	points
30-39% of documents present	1	points
29-0% of documents present	0	points

-->No changes were made here.

Client CM (Case Manager) Review



Partners Ending
Homelessness

HUD CoC review of Case Management

Number of Case Files Reviewed:

Active Clients	Has the program participant created or updated a Service Plan within the past 12 months?	Are notes in the Case Notes in the case plan tab?	Are notes in the Case Plan tab broken down by goal?	Does the program participant's Service Plan contain specific Goals that will assist them with obtaining and maintaining Housing?	Is there evidence in the program participant's previous 12 months of case/progress notes that program staff is providing services, making referrals, or having conversations about behaviors or actions that will assist the program participant with achieving their Goals?	Do the notes demonstrate regular monthly contact between case management and the client?	Are client issues/concerns followed up on and addressed in a timely and appropriate manner?	Supportive Housing Assessment	Acuity index
1	0								
2	0								
3	0								
4	0								
5	0								
6	0								
7	0								
8	0								
9	0								

- >Changes made:
- Column 6: Regular monthly contact
- Column 7: Follow up on concerns
- Columns 8-9: One point instead of two.

Actual expectations have not changed but the rubric has changed to more accurately reflect what we have always been looking for and discuss monthly in the case note audits.



Number of Case Files Reviewed:									
Exited Clients	Has the program participant created or updated a Service Plan within the past 12 months?	Are notes in the Case Notes in the case plan tab?	Are notes in the Case Plan tab broken down by goal?	Does the program participant's Service Plan contain specific Goals that will assist them with obtaining and maintaining Housing?	Is there evidence in the program participant's previous 12 months of case/progress notes that program staff is providing services, making referrals, or having conversations about behaviors or actions that will assist the program participant with achieving their Goals?	Do the notes demonstrate regular monthly contact between case management and the client?	Are client issues/concerns followed up on and addressed in a timely and appropriate manner?	Supportive Housing Assessment	Acuity Index
1	0								
2	0								
3	0								
4	0								
5	0								
6	0								
7	0								

Number of Case Files Reviewed:									
Clients with missing documentation from previous year's monitoring was documentation corrected?	Missing-Has the program participant created or updated a Service Plan within the past 12 months?	Missing-Are notes in the Case Notes in the case plan tab?	Missing-Are notes in the Case Plan tab broken down by goal?	Missing-Does the program participant's Service Plan contain specific Goals that will assist them with obtaining and maintaining Housing?	Missing-Is there evidence in the program participant's previous 12 months of case/progress notes that program staff is providing services, making referrals, or having conversations about behaviors or actions that will assist the program participant with achieving their Goals?	Missing-Do the notes demonstrate regular monthly contact between case management and the client?	Missing-Are client issues/concerns followed up on and addressed in a timely and appropriate manner?	Missing-Supportive Housing Assessment	Missing-Acuity Index
1	0								
2	0								
3	0								
4	0								

-->Same changes as above

Points for File review		Percentage of Documents Present			
** The Client CM review section will be scored using a sliding scale rubric.					
Points will be awarded according to the overall percentage of required documents that were present in the audited files:					
100% of documents present	15	points			
90-99% of documents present	13	points			
80-89% of documents present	11	points			
70-79% of documents present	9	points			
60-69% of documents present	7	points			
50-59% of documents present	5	points			
40-49% of documents present	3	points			
30-39% of documents present	1	points			
29-0% of documents present	0	points			
Unit Visit	Number of Units Visited				
Visual inspection of 10% of housing. Are the habitability standards being met? (3 points) *Project staff will choose 10% with a minimum of 2 for smaller projects and maximum of 4 for larger projects.					Yes=3 No=0
Page Total	0	Max=18 Min=0			

-->Change made:
Unit Visit

Visit
rochesterhousing.org/hqs-inspections for guidance on habitability standards.



Monitor Preparation



Partners Ending
Homelessness

Did the program attend the monitoring training?				0	
Was the project APR submitted on time? (2027)				0	
Have all APRs been accepted in SAGE? (present and past)(2027)				0	
Was the Project prepared for the site visit?				0	
			Points for Section	0	Max=2 Min=-1

-->Changes made:
Timely APR and Accepted SAGE Reports
These new questions will be answered for 2026 so that you know where you are, but they will not be scored until 2027

Monitor Scoring



Partners Ending
Homelessness

Section Point totals				
Section	Possible Positive Points	Possible Negative Points		Section Total
HMIS Privacy/Security & CoC Policy Binder	2	21		0
HMIS Data Intake and Exit	29	4		0
Coordinated Entry	12	3		0
Information/Documentation	19	9		0
Finances	11	14		0
Project Outcomes	102	45		0
PIT Participation	8	3		0
File Review Section	15	0		0
Client CM Review	18	0		0
Other Scores	2	1		0
Project Totals	218	100	Total Score	0
			Percentage	0%

-->No significant changes. Added percentage in addition to total score



What happens next?



Partners Ending
Homelessness

- Site visits are being scheduled for projects that ended 90 days+ ago.
- Site visits will be scheduled 90 days after your Project has ended
- You will be given three time slot options the week of the visit.
- The other three projects might get the same available time slots
- Please pick the time that works best for you and your staff (first come, first served)
- Anywhere from 2 to 4 monitors will show up to the visit, this is including Jennifer, Josiah and Carolyn (once per Program), and non-conflicted reviewer when available.
- **Recipients are responsible for contacting sub-recipients about the upcoming site visit.**



- A week before, we will request the following (please have it back to us within 24 hours/next business day of request)
- Current to date active rent roll or program roster
- List of clients who entered from Coordinated Entry
- List of clients who exited the program within the program year-end in 2024
- Proof of income for participants over income for non-cash benefits
- 24 hours before we will send out a list of files the team would like to review

***Please remember to take *all* of the above into consideration when choosing your site visit date. For example, please don't choose the day after your team returns from vacation, or the day after a conference. If your agency typically does not have people around on Fridays, don't choose a Monday for your site visit.**



