Approving an ESG User Account in Sage

Only a person with an active account in Sage may approve (or deny) an ESG user. Recipient who have a user with a user level of Data Entry and Account Admin may approve an ESG User. HUD Field Office or the AAQ may approve an ESG user only if there is no Data Entry and Account Admin affiliated with the recipient to do so.

ESG users are generally ESG recipient staff and are set at a Data Entry user level. The ESG recipient may elect to provide other support staff access to Sage for purposes of assisting with CAPER submission, but only the recipient’s Data Entry and Account Admin may authorize someone other than the recipient staff to use Sage. It is the responsibility of the Data Entry and Account Admin to determine the appropriateness of the request for access to Sage.

Every recipient must have at least one Data Entry and Account Admin user. This person must be a recipient staff person and will have the ability/authority to submit the report to HUD.

Subrecipients do not have an account in Sage affiliated with the ESG recipient to submit their CAPERs. They receive a link from the recipient for their annual CAPER submission, and do not need to log onto Sage to Submit.

The new user must create an account for themselves at www.sagehmis.info and identify themselves as a Recipient-ESG Grant for their position, and under the entity type in ESG and select the correct recipient from the list.

Once the account is created the Data Entry and Account Admin receives an email to consider approving a new user:

1. Log onto Sage
2. Click on the ADMIN tab in the Navigation Bar
3. Click on Show pending users
4. Find the users on the list you want to approve
5. Set the “level of access”
6. Click √ Approve