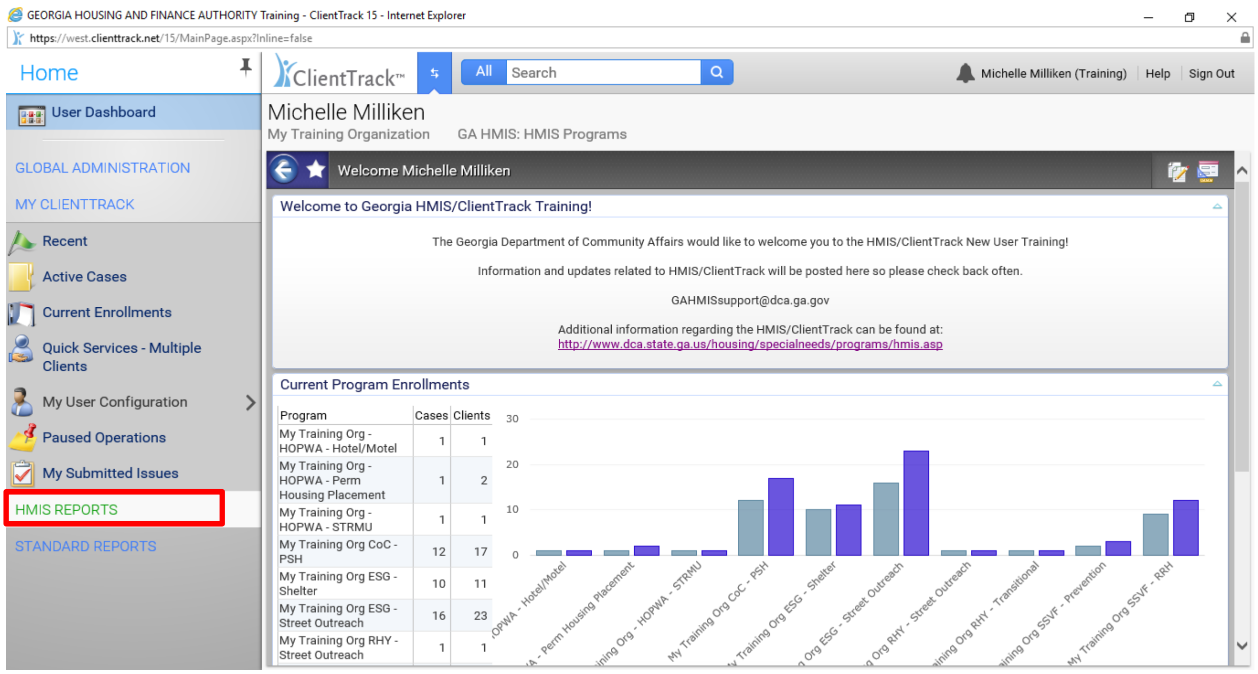
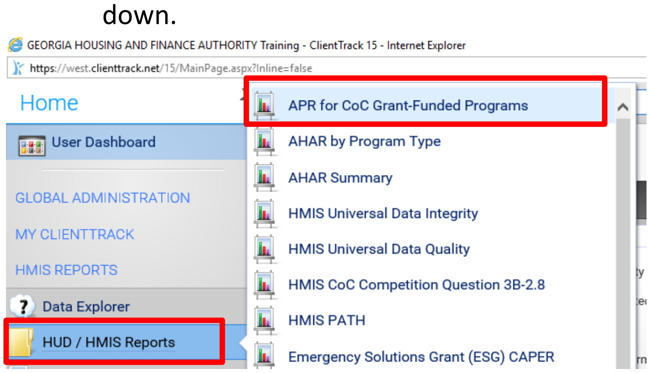
Quick Reference Guide for the Annual Performance Report (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

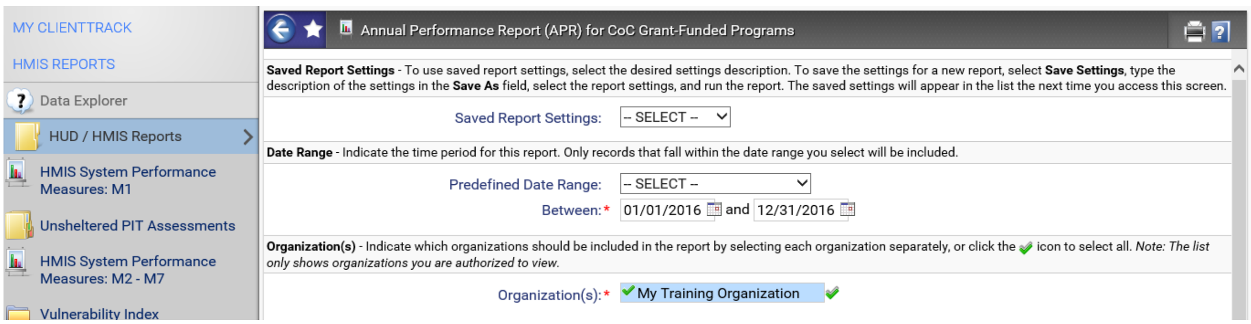
<u>To Generate an APR</u>



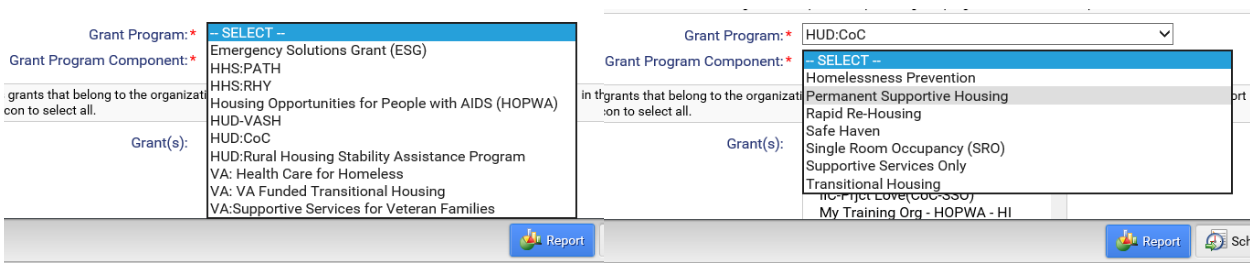
- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your user dashboard.
- Click on **"HMIS Reports"** found in the list of links in the upper left-hand corner of the screen. A list of reports should drop down after clicking on the "HMIS Reports" link.
- Select **"APR for CoC Grant-Funded Programs"** in the list of reports that appear in the drop down.



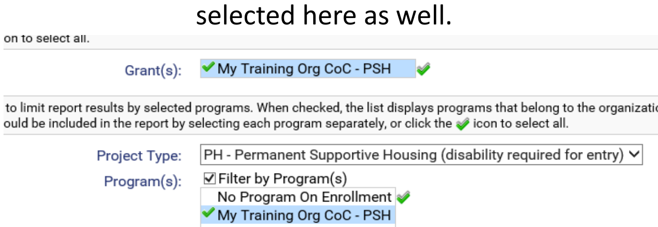
- Set up your report parameters by:
  - **Completing the date range** – There are a couple of options for setting the date range. You can select from the "Predefined Date Range," though this may not provide you the exact dates you need. You can fill in the dates found below this labeled "Between." The first date box is the beginning date and the second date box is the ending date – for example, 01/01/2012 and 12/31/2012. This will give me all of the clients in my program for the entire year of 2012.



  - **Select the appropriate option for "Grant Program" and "Grant Program Component".**

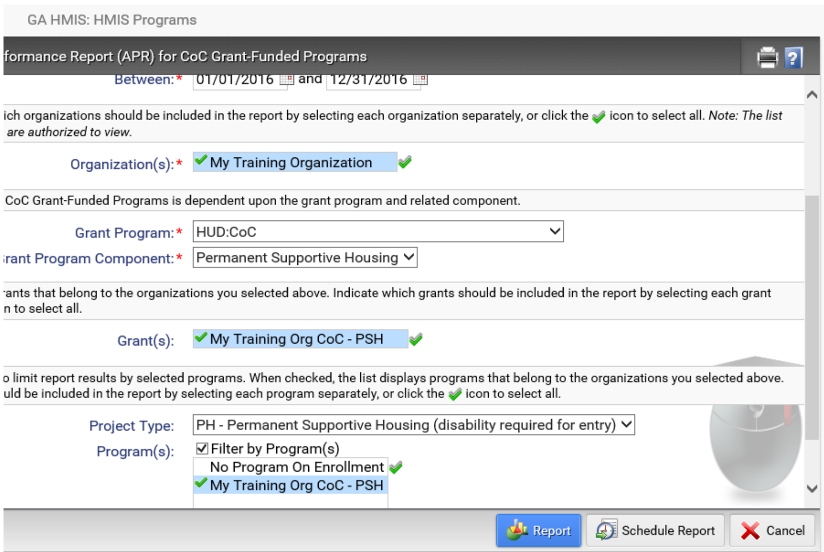


  - **Selecting "Grants"** – You may see several options to choose from after selecting "Grant Program" and "Grant Program Component." Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the "Grant" you want to run the APR for by clicking on the title in the box. A green check mark should appear to show that you have successfully selected a grant. To unselect one, simply click on it again and you will see the green check mark disappear.
  - **Clicking on "Programs: Filter by Programs"** to select your program. Same set up as "Grants." To select a program click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well.



12.26.16

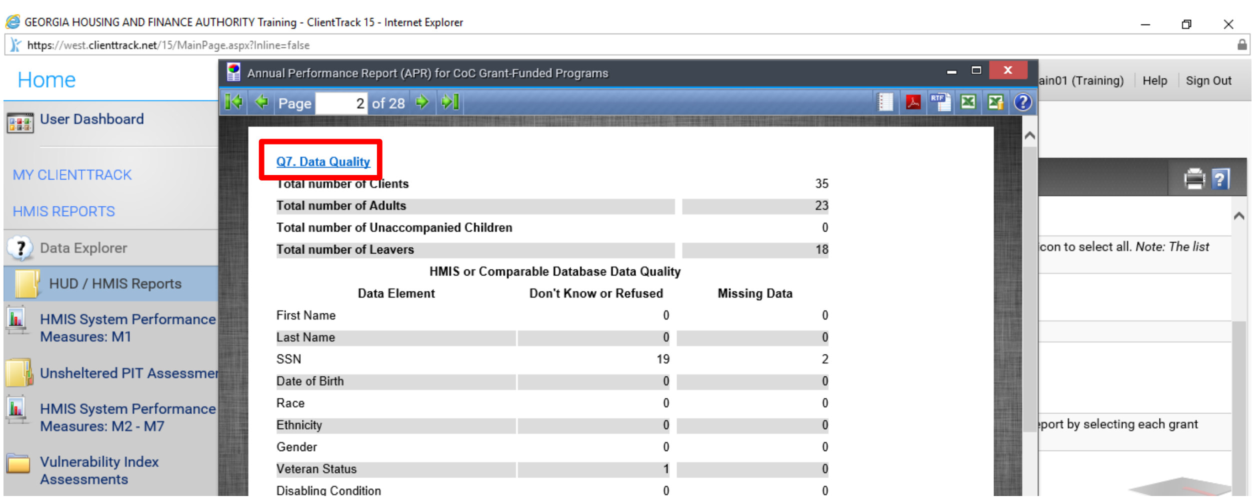
- Click on the **“Report”** button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.



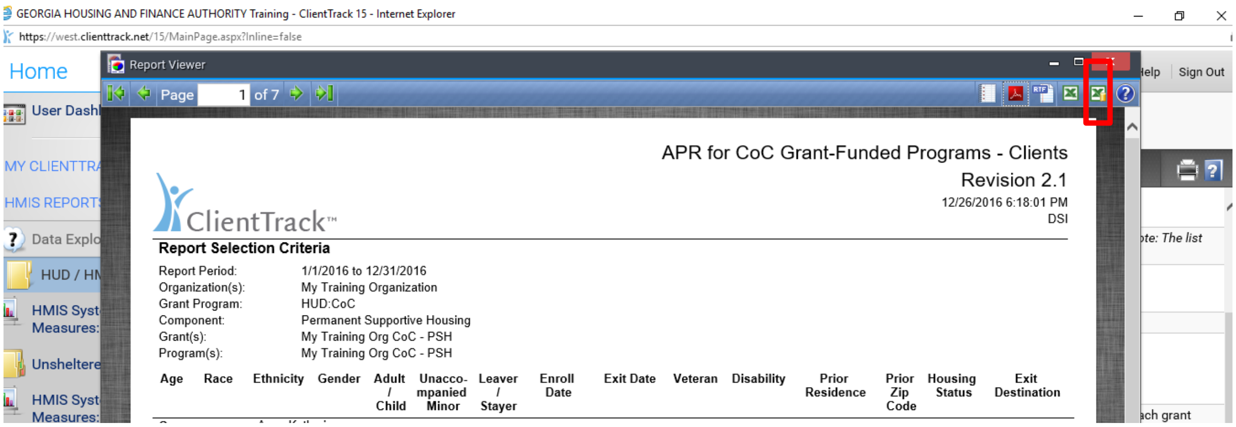
To Drill Down and Find Missing Data

After you have run your report and have it opened in the pop up window, you can click through it and see where you have “Missing” data. To find who has missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data – for example “Q.7 Data Quality.” **Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.*



- Another window should pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to find the missing data.



- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to save the spreadsheet – save it and then open it to review the data.
- You will see the word **"MISSING"** on the spreadsheet where you are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data. (Special Note: There may be some missing categories on the Excel document that do NOT need to be addressed. Children are not required to have a Domestic Violence Assessment, therefore, that field will show as missing but no missing will show on page 2 of the actual report.)

To Complete Missing Data on a Client Record

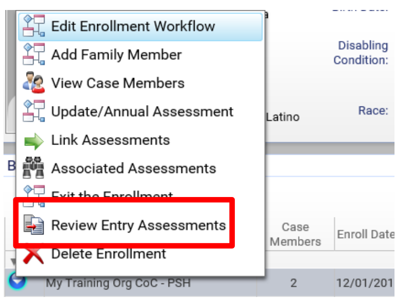
Once you have identified which clients are missing important data on your APR, you can edit the client information using the appropriate steps below.

To Edit Disabling Condition or Veteran Status

- Go to the client record for whom the Disabling Condition or Veteran Status is missing.
- Click on "Edit Client" in the list of case management tools found on the left-hand side of the client record.
- Scroll down to "Disabling Condition" or "Veteran Status" and update the information with the drop down box provided.
- Scroll down and click "Save" to save the changes to the client record.

To Edit and Entry or Exit Assessment (including Living Situation, Time on Streets/Shelter, Domestic Violence and Financial Assessments)

- Go to the client record for whom entry or exit data is missing.
- Click on the blue play button beside your program enrollment located centrally on the client record.
- Select "Review Entry Assessments" or "Review Exit Assessments" in the drop down list that appears after clicking on the blue play button.
- Edit the entry or exit assessments by clicking on the little notepad beside the specific assessment you wish to update.
- Click "Save" to save the changes to the assessment and you will return to the list of entry or exit assessments.



<u>Special consideration to update Project Entry Date, Project Exit Date and/or Exit Destination</u>

Project Entry Date, Engagement Date, Move-in Date or PATH Enrollment Status –

- Click on the blue play button next to the enrollment on the Client Dashboard. You should select the "Edit Enrollment Workflow" and edit information accordingly.

Project Exit Date and/or Exit Destination –

- In order to edit exit related information, you will need to select the "Exit the Enrollment" option from the blue play button and edit the necessary information.

If you need any assistance generating your APR or finding and completing missing data, contact the HMIS Help Desk using the Help option in the upper right hand corner of the ClientTrack application.