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.

To Run an APR

- Click on **"Reports"** found under "My ClientTrack" in the bottom left-hand corner of your user dashboard.
- Click on the **"HMIS Reports" folder** 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" folder.
- 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, 01/01/2013 and 12/31/2013. This will give you all of the clients in your program for the entire year of 2013.
    - **Choosing the "Grant Program" and "Grant Program Component"** - Select the grant your program is under in the drop down for "Grant Program." This will prompt the next selection in "Grant Program Component." If you do not know this information, feel free to try several selections to find the correct options for your program. You won't break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing HMISHelpDesk@ihcdaonline.com.
    - **Selecting "Grants"** – You may see several options to choose from after selecting "Grant Program" and "Grant Program Component." 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 name in the box. A green check mark should appear inside the box to show that you have successfully selected a grant. You can run multiple programs on the same report. Simply select multiple "Grants" by clicking on the name in the box. Again, you will see the green check mark inside the box to indicate you've selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
    - **Selecting "Project Type"** – Click on the drop down box to select your Project Type. What is selecting in Project Type will determine what programs you can select in the next step – "Filter by Programs."
    - **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 inside the box to show that you have successfully selected it. Multiple programs can be selected here as well. To deselect a program, click on it again and the green check mark should disappear indicating the program is no longer selected for the report.

- 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.

<u>To Drill Down and Find Missing Data</u>

After your report populates and opened in the new window, you can click through with the green arrows at the top of the window and see where you have "Missing" data. To find clients who are 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 new window that appears after clicking on the section header. You may be prompted to open the document, click on "Open" to open the Excel spreadsheet with the client data. **If you are prompted to save the spreadsheet before opening it, please change your download settings on your Internet browser to automatically open downloads so no client information is saved to your computer when exporting.*
- 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.

<u>To Complete Missing Data on a Client Record</u>

Once you have identified which clients are missing important data on your APR, you can edit the client information with 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 Entry or Exit Assessments (including Prior Residence Data, Domestic Violence Assessment, Financial Assessment and more)

- 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.

Please note to change the exit destination or exit reason, you will need to exit the client again to access these specific data fields as they are not included in the list of exit assessments when reviewing exit assessments. Once you have started the exit workflow, edit the destination or reason and click on “Save.” When you go to the next screen in the exit workflow, click on the black “X” in the upper right-hand corner of the exit workflow window located in the upper left-hand corner of the client record. This will delete the exit workflow, saving your changes and saving your previous exit assessment information.

If you need any assistance running your APR or finding and completing missing data, contact the HMIS Help Desk at HMISHelpDesk@ihcdaonline.com.