

APR MANUAL

Please use this manual as a guide on how to prepare, run and upload the APR to SAGE.

The HUD DQ Report and Program roster report can be used to check the accuracy of client numbers.

- I. **Program Roster Report:** Run Program roster report and use to ensure Households are configured correctly and there are no duplicate clients.
- II. **Data Quality Report (DQ) Section 1:** Use HUD DQ report and/or APR to check on data quality. The HUD DQ questions are directly comparable with the APR. Question 1 (Q1) of DQ report gives the same information as APR Q5a. Question 2 (Q2) -5 are equivalent to APR Q6a-6d. Please note the Data Quality report is a shorter report and unlike the APR, will not take as long to populate.

HMIS Data Quality Report Categories:

- A. Q1: Number served/ Number of Chronic Homeless
 - B. Q2: Personal Identifying Information
 - C. Q3: Universal Data Elements - veteran status, disabling condition
 - D. Q4: Income and Housing Data Quality
- III. **Data Quality Report (DQ) Section 2:** Run APR as a web page for further verification (drill down).
 - IV. **Running Reports for Combined Projects & Upload to SAGE:** Run APR in “CSV-Upload” report format and prepare for upload to SAGE

For Further Assistance:

Clarity Human Services Help Center

<https://get.clarityhs.help/>

Bitfocus OneSF HMIS Helpdesk

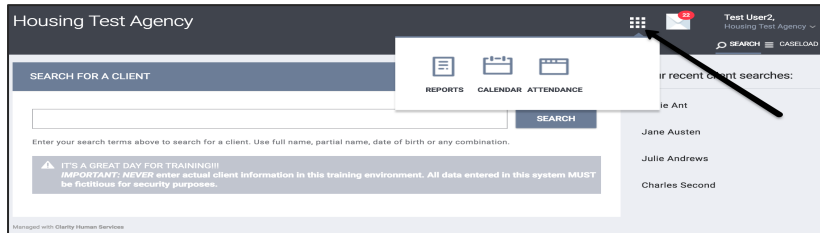
<https://onesf.clarityhs.help>

onesf@bitfocus.com

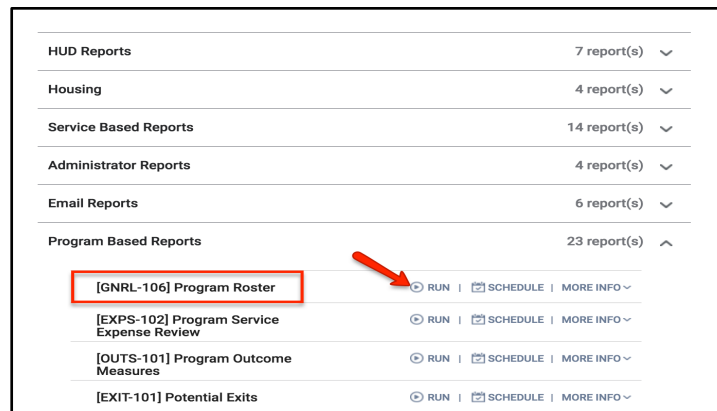
(415) 429.4211

I. Program Roster Report

1. Click on the launcher and select Reports (see image)



2. From the Report Library select **Program Based Reports**; this will roll out the report options under this category- select report number **[GNRL-106] Program Roster**
3. Select Run (see image below)



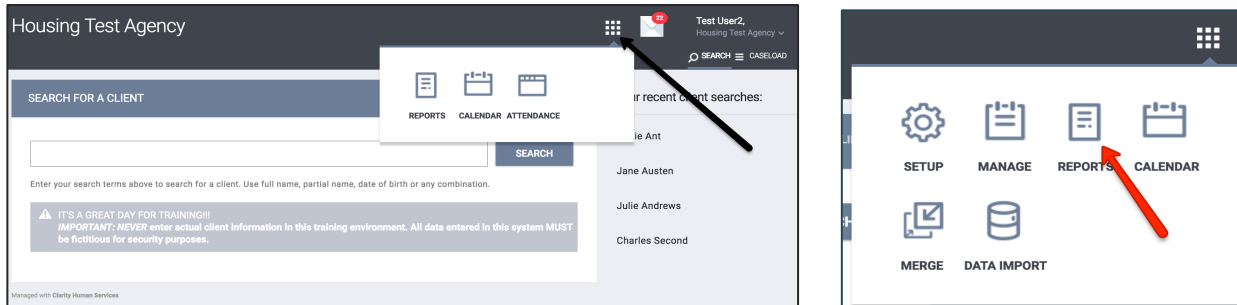
4. Select the filters you want the report to pull:
 - a. **Programs**-choose the name of the program or select ALL
 - b. **Status**-from the drop-down menu select active, enrolled, or exited
 - c. **Report Date Range**-enter the dates range for the report
 - d. **Report Output Format**-Select the format as either Web Page, PDF or Excel
5. **Submit**-will run the report (see image)

Program Roster Report											Housing Test Agency	
											Active within 07/01/2017 - 06/30/2018	
Housing Move-in: Undefined = Unknown Start or Move-in is Null, <input type="checkbox"/> = Non PH Project												
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assessments	Services	Assigned Staff	
Program: Housing Program												
Spring, Sally	DC7305D06	03/01/1980	36	38	10/05/2016	09/30/2017	360	10/05/2016	7	4	A. Wilson (deleted)	
Spring, Sammy	DB38A4F00	04/24/2010	6	8	10/05/2016	09/30/2017	360	10/05/2016	6	2	A. Wilson (deleted)	
Spring, Stevie	C38DC1C31	01/01/2010	6	8	10/07/2016	09/30/2017	358	10/05/2016	6	1	A. Wilson (deleted)	
Refused, 70338e1f	70338e1f	01/01/1975	41	43	09/01/2016	-	698	undefined	0	1	A. Wilson (deleted)	
Refused, D023229E	DDF3229E	01/01/2009	7	9	09/01/2016	-	668	undefined	0	1	A. Wilson (deleted)	
Refused, Fc849f304	FC849f304	01/01/1974	42	44	09/01/2016	-	658	undefined	0	1	A. Wilson (deleted)	
Sanders, Bernice	A0AB8E3F3	04/05/1969	17	19	10/1/2016	-	629	undefined	0	1	A. Wilson (deleted)	
Sanders, Billie	REC09A48	03/03/1972	44	46	10/1/2016	-	629	undefined	0	1	A. Wilson (deleted)	
Sanders, Stevie	07A48D88	08/08/2005	11	12	10/1/2016	-	629	undefined	0	1	A. Wilson (deleted)	
Spring, Suele	3AA7949E	08/05/2008	8	9	10/1/2016	-	629	undefined	0	0	A. Wilson (deleted)	
Marsh, Annette	8AB8A70A7	04/04/1986	30	32	10/1/2016	-	621	undefined	0	0	A. Wilson (deleted)	
Marsh, Bob	5B8BDB8A	08/08/2012	4	5	10/1/2016	-	621	undefined	0	0	A. Wilson (deleted)	
Spring, Sally	DC7305D06	03/01/1980	38	38	06/02/2018	06/02/2018	8	06/02/2018	0	0	A. Wilson	
Spring, Sammy	DB38A4F00	04/24/2010	8	8	06/02/2018	06/02/2018	8	06/02/2018	0	0	A. Wilson	
Spring, Stevie	C38DC1C31	01/01/2010	8	8	06/02/2018	06/02/2018	8	06/02/2018	0	0	A. Wilson	
Total: 19												
Program Name				Project Type				Project Applicability				
Housing Program				PH - Permanent Supportive Housing (disability required)				Permanent Housing for Disabled Homeless Persons (PH-PH)				
Thu Jul 12 01:23:02 PM 2018												
Powered by CLARITY												

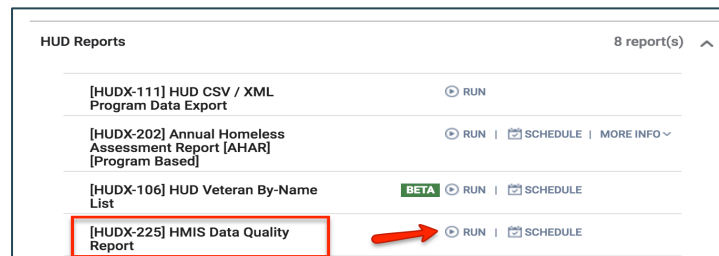
Useful Tip: This report identifies who is enrolled in the program, can be run for active or exited clients and allows you to identify group enrollments as well as duplicates.

II. Data Quality Report (DQ) Section 1

1. Click on the launcher and select Reports (see image)



2. From the Report Library select **HUD Reports**; this will roll out the report options under this category-select report number **[HUDX-225] HMIS Data Quality Report** (see image)



3. Select Run (see image below)
4. Select the filters you want the report to pull:
 - a. **Program Type(s)**-choose the name of the program or select ALL
 - b. **Program Status**-from the drop-down menu select all programs, active programs or inactive programs
 - c. **Program(s)**-Choose ALL or the specific program
 - d. **Report Date Range**-enter the dates range for the report
 - e. **Report Output Format**-Select the format as either Web Page, PDF or Excel
 - f. **Drilldown Output Format**- Select the format as either Web Page, PDF or Excel
 - g. **Submit**-will run the report

HUD Reports > [HUDX-225] HMIS Data Quality Report

Program Type(s)

Program Status

Program(s)

Report Date Range -

Report Output Mode

Report Output Format ☒ Web Page ☐ PDF ☐ Excel ☐ Zip with XLSX

Drilldown Output Format ☒ Web Page ☐ PDF ☐ CSV

SUBMIT

**Please note selecting Web Page format will make the drilldown option accessible.*

5. The report may take a few minutes to process; select OPEN from the pop-up to view

Data Quality Report (DQ)-Continued

Use HUD DQ report or APR to check on data quality issues listed below. The report sections are identified with a sub header (e.g., **Q5a. Report Validation Table** etc.)

A. APR Q5a or DQ Q1: Number served/ Number of Chronic Homeless

1. If the program serves only clients experiencing chronic homelessness, review the **Total number of persons served** and the **Number of chronically homeless persons** to see if these numbers match (see image).

Q5a. Report Validations Table	
Program Applicability: All Projects	
Total number of persons served	19
Number of adults (age 18 or over)	19
Number of children (under age 18)	0
Number of persons with unknown age	0
Number of leavers	1
Number of adult leavers	1
Number of adult and head of household leavers	1
Number of stayers	18
Number of adult stayers	18
Number of veterans	2
Number of chronically homeless persons	2
Number of youth under age 25	0
Number of parenting youth under age 25 with children	0
Number of adult heads of household	19
Number of child and unknown-age heads of household	0
Heads of households and adult stayers in the project 365 days or more	17

Compare the lists of Total number of persons served and Number of chronically homeless persons. The list of clients will appear by clicking on the number on the row. If clients are not showing as chronically homeless, review the client's enrollment screen to ensure the client's Living Situation and the Disabling Condition on the enrollment meet the HUD definition of Chronic Homelessness.

**Please note below the HUD definition of Chronic Homelessness, highlighted with key indicators.*

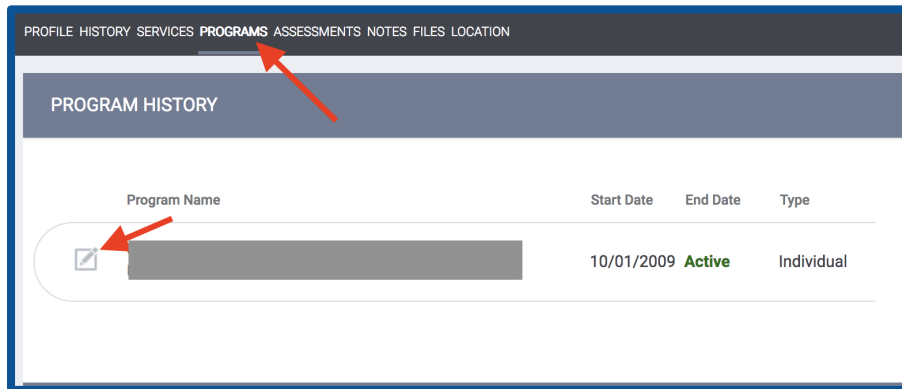
HUD Definition of Chronic Homelessness

“The following is a summary of the most significant changes between the definitions of chronically homeless previously in effect and the definition included in the [CoC Program interim rule](#) as amended by the [Final Rule Defining “Chronically Homeless”](#)”:

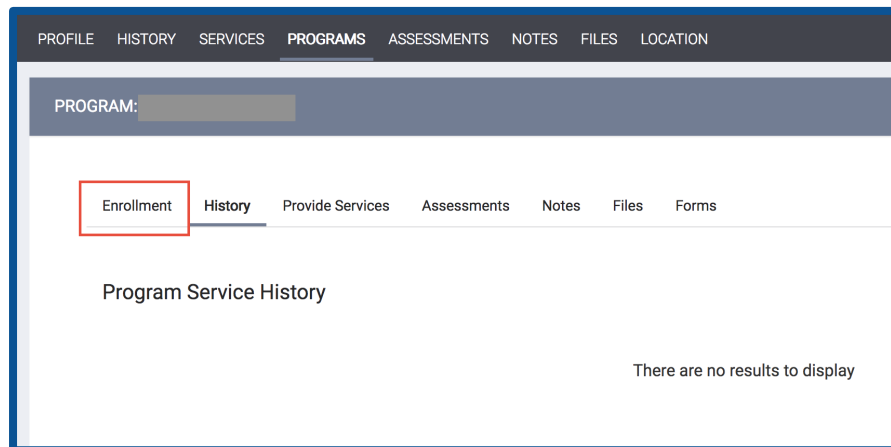
- To be considered chronically homeless, an individual or head of household must meet the definition of “homeless individual with a disability” from the [McKinney-Vento Act, as amended by the HEARTH Act](#) and have been living in a place not meant for human habitation, in an emergency shelter, or in a safe haven for the last 12 months continuously or on at least four occasions in the last three years **where those occasions cumulatively total at least 12 months;**
- The term “disabling condition” was replaced with “homeless individual with a disability” from the Act. While the types of conditions that can be considered are the same, the definition of “homeless individual with a disability” also requires that the condition be of long and continuing duration; substantially impedes the individual’s ability to live independently; and, is expected to improve with the provision of housing. To be eligible for permanent supportive housing generally, an individual or family member must be considered a “homeless individual with a disability”, therefore, HUD adopted this term into the definition of chronically homeless to ensure consistency;
- Occasions are defined by a break of at least **seven nights** not residing in an emergency shelter, safe haven, or residing in a place meant for human habitation (e.g., with a friend or family). Stays of fewer than seven nights residing in a place meant for human habitation, or not in an emergency shelter or safe haven do not constitute a break and count toward total time homeless; and
- Stays in institutions of fewer than 90 days where they were residing in a place not meant for human habitation, in an emergency shelter, or in a safe haven immediately prior to entering the institution, **do not constitute as a break** and the time in the institution counts towards the total time homeless. Where a stay in an institution is 90 days or longer, the entire time is counted as a break and none of the time in the institution can count as a break and **none of the time in the institution can count towards a person’s total time homeless.”**

Access the Enrollment Screen

1. Search and find the client
2. From the main tabs, select **PROGRAMS** (see image below)
3. From Program History select the appropriate program for the client
4. Once you have identified the program, hover with your mouse on the left-hand side of the program name and select the square with the pencil-this is the edit option, upon selection it will take you to the next screen



5. Next, select enrollment from the subtabs (see image below)
6. The enrollment screen will then populate
7. Proceed to enter and/or update any questions as necessary




Living Situation

Scroll down to the Living Situation section of the enrollment screen. In the example below, the client is living in a Place not meant for habitation for 90 days or more, but less than one year. Also, the client was on the street One Time in the past three years.

According to the first bullet point in the HUD definition: “living in a place not meant for human habitation, in an emergency shelter, or in a safe haven for the last 12 months continuously or on at least four occasions in the last three years where those occasions cumulatively total at least 12 months”

This client would not appear on the list of chronically homeless clients on Q5a since the client lived in a place not meant for habitation for 90 days or more, but less than one year; One Time. According to the responses, this client did not have at least four occasions in the last three years where those occasions cumulatively total at least 12 months (see image below).

LIVING SITUATION	
Type of Residence	Place not meant for habitation
Length of Stay in Prior Living Situation	90 days or more, but less than one year
Approximate Date Homelessness Started	05/11/1997 
Number of times on the streets, in ES, or Safe Haven in the past three years	One Time
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Three Months

Disabling Conditions

Scroll down to the Disabling Conditions and Barriers section of the enrollment screen (see image below). In the example below, **Physical Disability**, **Developmental Disability**, and **Chronic Health Condition**, and **Mental Health Problem** are marked yes, while the first question, **Disabling Condition** is marked **Data not collected**. Make sure the first disabling condition question is marked yes if the client has a disabling condition.

According to the second bullet point in the HUD definition: “While the types of conditions that can be considered are the same, the definition of “homeless individual with a disability” also requires that the condition be of long and continuing duration; substantially impedes the individual’s ability to live independently.” These questions are asked on the enrollment screen after “Yes” is selected to a disability type question. In the example below, Physical Disability and Developmental Disability are marked yes, making additional questions populate (see image).

DISABLING CONDITIONS AND BARRIERS			
Disabling Condition	Data not collected		
Physical Disability	Yes	Long Term	Select
Developmental Disability	Yes	Substantially Impairs Independence	Select
Chronic Health Condition	Yes	Long Term	Select
HIV - AIDS	No		
Mental Health Problem	Yes	Long Term	Yes
Substance Abuse Problem	No		
Domestic Violence Victim/Survivor	No		

Data Quality Report (DQ)-Continued

Use HUD DQ report or APR to check on data quality issues listed below. The report sections are identified with a sub header.

B. DQ Q2/ APR Q6a: Personal Identifying Information

Information Missing Column

- Quality of Name/SSN, Blank, Data Not Collected

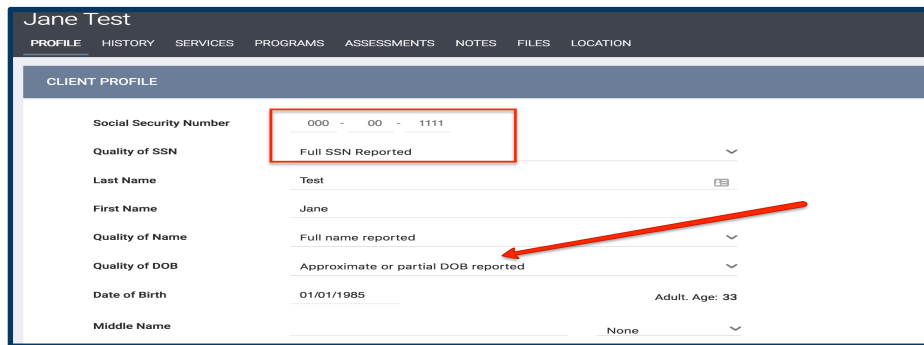
Data Issues

- Quality of SSN Full SSN Reported, but all 0s (zeros) or partial social in the numbers

Quality of DOB

- Full DOB reported, but Quality of DOB listed as approximate or partial DOB reported

Useful Tip: These errors can be fixed on the profile screen.



Jane Test

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION

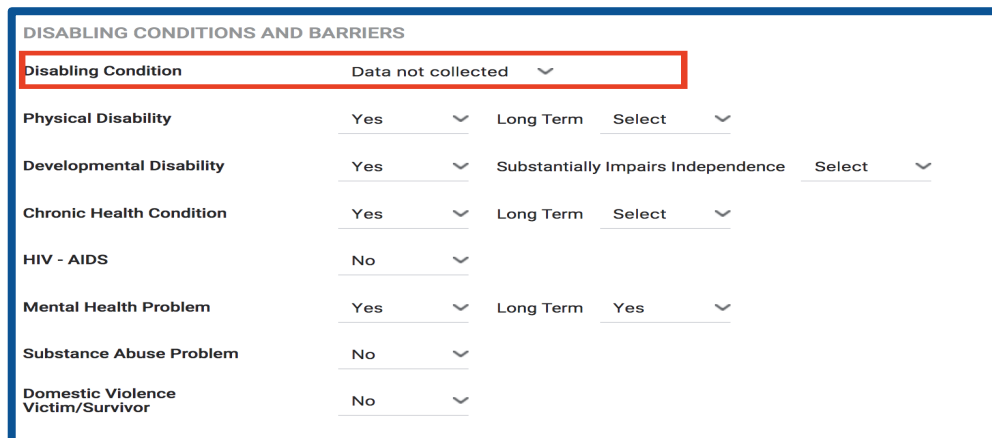
CLIENT PROFILE

Social Security Number	000 - 00 - 1111
Quality of SSN	Full SSN Reported
Last Name	Test
First Name	Jane
Quality of Name	Full name reported
Quality of DOB	Approximate or partial DOB reported
Date of Birth	01/01/1985
Middle Name	None
Adult Age	33

C. DQ Q3/ APR Q6b. Data Quality: Universal Data Elements

Disabling Condition is located on the Program Enrollment Screen. To access the program enrollment screen, follow steps 1-7 on page 6 of this document.

Scroll down to the Disabling Conditions and Barriers section of the enrollment screen. In the example below, **Physical Disability**, **Developmental Disability**, and **Chronic Health Condition**, and **Mental Health Problem** are marked yes, while the first question, **Disabling Condition** is marked **Data not collected** (see image below). *Selecting yes to disabling conditions when the first Disabling Condition question is marked no, or data not collected will cause an error.*

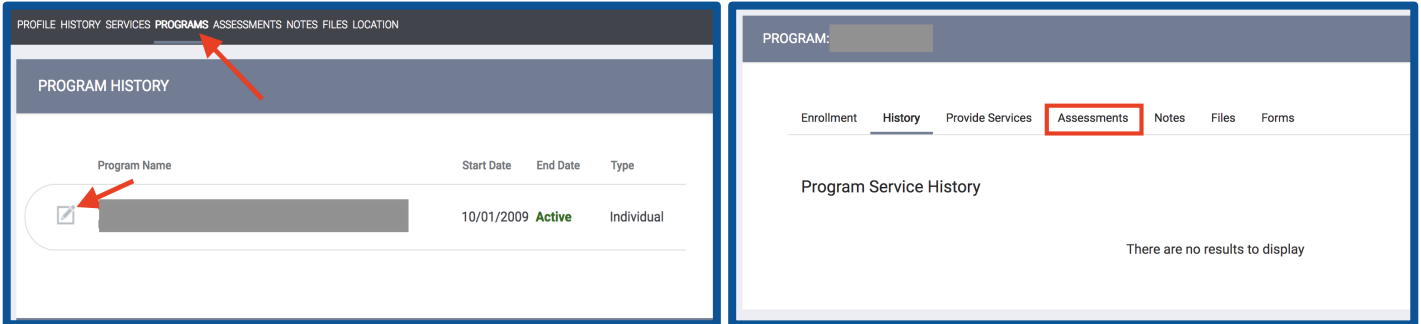


DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Data not collected	
Physical Disability	Yes	Long Term
Developmental Disability	Yes	Substantially Impairs Independence
Chronic Health Condition	Yes	Long Term
HIV - AIDS	No	
Mental Health Problem	Yes	Long Term
Substance Abuse Problem	No	
Domestic Violence Victim/Survivor	No	

D. DQ Q4/ APR Q6c. Data Quality: Income and Housing Data Quality

To access the **Annual Assessment** steps 1-7 on page 6 of this document. Select the **Assessments** subtab from the options.

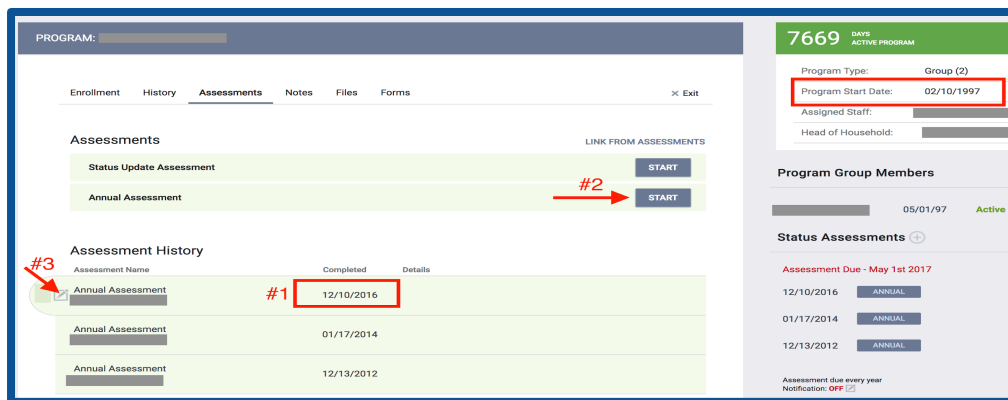


The left screenshot shows the 'PROGRAM HISTORY' tab. A red arrow points to the 'PROGRAMS' tab in the top navigation bar. Another red arrow points to a checkbox in the 'Program Name' column of the table below.

Program Name	Start Date	End Date	Type
[Redacted]	10/01/2009	Active	Individual

The right screenshot shows the 'Assessments' subtab for a specific program. The 'Assessments' tab is highlighted in the top navigation bar. Below the 'Program Service History' section, it states 'There are no results to display'.

Assessment errors may be related to a client not having an assessment completed within the APR report date range. **(#1) Review the recorded Assessments.** If there is no assessment recorded within the APR date range, complete a new assessment and **(#2) record the Project Status Date within +/- 30 days of the Program Start Date** (Project Status Date Screenshot in next paragraph). If an assessment is already recorded within the APR date range, open the assessment and **(#3) scroll down to the Income and Sources and/or Non-Cash benefits section** of the assessment and correct the errors.

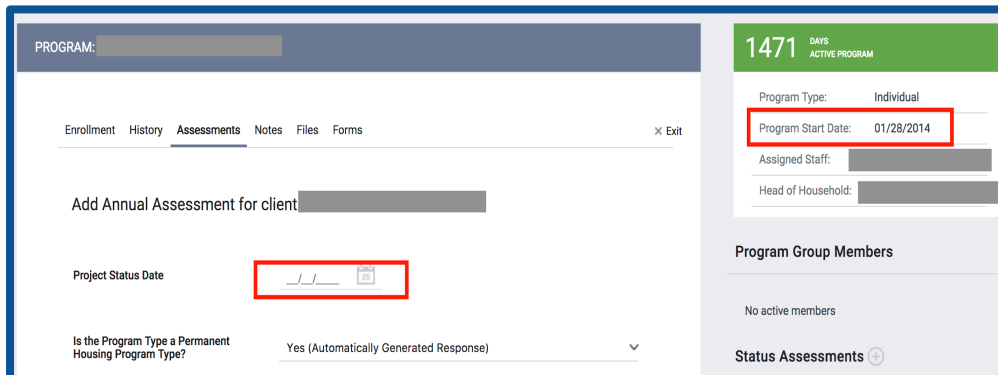


The screenshot shows the 'Assessments' subtab for a specific program. The 'Assessments' tab is highlighted in the top navigation bar. The 'Assessment History' section shows a table of assessments. A red arrow points to the 'Annual Assessment' row, which is highlighted in green. A red box highlights the 'Completed' date '12/10/2016'. A red arrow points to the 'START' button next to the 'Annual Assessment' row. A red arrow points to the 'START' button next to the 'Annual Assessment' row. A red arrow points to the 'START' button next to the 'Annual Assessment' row.

Assessment Name	Completed	Details
Annual Assessment	12/10/2016	
Annual Assessment	01/17/2014	
Annual Assessment	12/13/2012	

The right sidebar shows the 'Program Group Members' section. The 'Program Start Date' is '02/10/1997'. The 'Status Assessments' section shows a table of assessments. A red box highlights the 'Program Start Date' '02/10/1997'.

The Project Status Date must be recorded annually within +/- 30 days of the anniversary of the client's Program Start Date. In the example below, the Program Start Date is 01/28/2014, the Project Status Date should be within +/- 30 days of 01/28, and then the year within the report date range. 01/28/2017 is an example of a Project Status Date recorded within +/- 30 days of the client's Program Start Date and within the APR reporting date range.



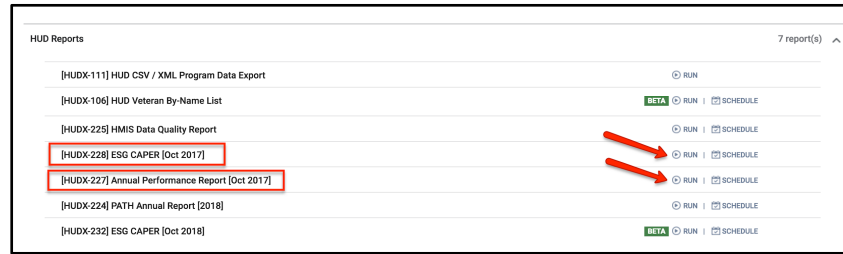
The screenshot shows the 'Assessments' subtab for a specific program. The 'Assessments' tab is highlighted in the top navigation bar. The 'Add Annual Assessment for client' section shows a form. A red box highlights the 'Project Status Date' field, which contains the date '01/28/2017'. A red box highlights the 'Program Start Date' field, which contains the date '01/28/2014'.

The right sidebar shows the 'Program Group Members' section. The 'Program Start Date' is '01/28/2014'. The 'Status Assessments' section shows a table of assessments. A red box highlights the 'Program Start Date' '01/28/2014'.

III. Data Quality Report (DQ) Section 2

Use HUD DQ report or APR to check on data quality issues listed below. The report sections are identified with a sub header. Run the report as a Web Page, which will provide the drill down option (verify data). When ready to upload the report run it as a CSV-Upload file.

1. From the launcher select the **REPORTS** option
2. From the **REPORT LIBRARY** select the HUD Reports
3. Select **[HUDX-228] ESG CAPER [Oct 2018]** and/or **[HUDX-227] Annual Performance Report [Oct 2018]**



4. Select RUN, this will populate a new screen from the Report Library
5. Enter the filters you will use to run the report(s)
6. If checking data use the Web Page Output Format
7. If you have checked your data and are ready to upload, select the CSV-Upload option

HUD Reports > [HUDX-228] ESG CAPER [Oct 2018]

CoC Filter Category: Choose...

CoC: No data to display...

Program Type(s): Choose...

Program Status: Choose...

Program(s): Choose...

Apply Client Location Filter: No

LEGACY FEATURE: SERVICE BASED FUNDING SOURCE

Funding Criteria: Choose...

Funding Status: Choose...

Funding(s): Choose...

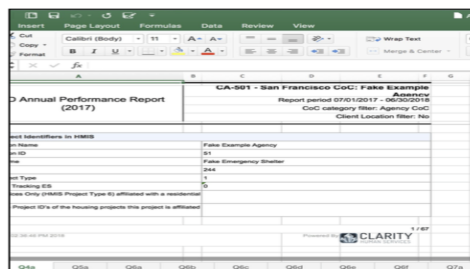
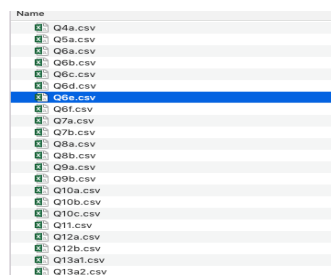
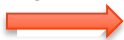
Report Date Range: / / - / /

Report Output Format: ☒ Web Page ☐ PDF ☐ Excel ☐ CSV-Upload

8. You have the ability to download these reports and rename and save to a directory of your choice

Helpful Tip: Please note that when downloading as a CSV-Upload file it will be in a folder that will contain each question separately. This is intentional.

CSV-UPLOAD

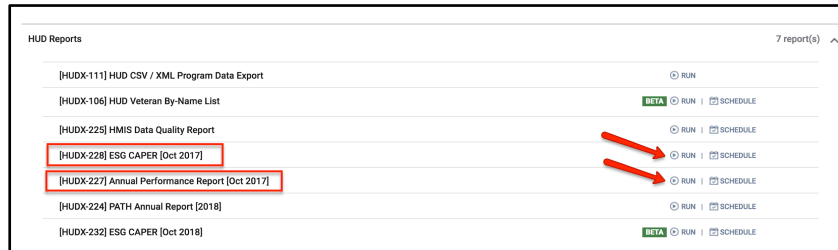


APR Export in Excel



IV. Running Reports for Combined Projects & Upload to SAGE

1. From the launcher select the **REPORTS** option
2. From the **REPORT LIBRARY** select the HUD Reports
3. Select **[HUDX-228] ESG CAPER [Oct 2018]** and/or **[HUDX-227] Annual Performance Report [Oct 2018]**



4. Select RUN, this will populate a new screen from the Report Library
5. Enter the filters you will use to run the report(s)

HUD Reports > [HUDX-228] ESG CAPER [Oct 2018]

CoC Filter Category: Agencies in CoC

CoC: Choose...
CA-501 - San Francisco CoC

Program Type(s): Coordinated Assessment

Program Status: All Programs

Program(s): Choose...
All
Program Name #1
Program Name #2

When selecting multiple programs hold down the command key and with your mouse select the programs you want pulled in the report.

Apply Client Location Filter: No

LEGACY FEATURE: SERVICE BASED FUNDING SOURCE

Funding Criteria: No Funding Source

Funding Status: Choose...

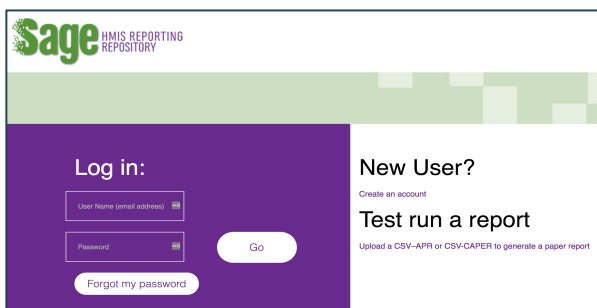
Funding(s): Choose...

Report Date Range: 04/01/2019 - 04/15/2019

Report Output Format: ☐ Web Page ☐ PDF ☐ Excel ☒ CSV-Upload

SUBMIT

6. Select the **SUBMIT** button
7. Upload the file to SAGE- <https://www.sagehmis.info>



Helpful Tip:

You can Test the report without making an account

*To upload the report **you must create an account***

[There is more information here](#) (click on this link)