

Annual Performance Report (APR) MANUAL

Please use this manual as a guide on how to prepare, run and upload the APR to SAGE. Sections I - III of this manual outline steps to prepare your data for your APR submission. The [\[HUDX-225\] HMIS Data Quality Report \[FY2020\]](#) and [\[GNRL-106\] Program Roster Report](#) can be used to check the accuracy of client numbers. **Step IV outlines how to submit your APR once it's ready for SAGE upload.**

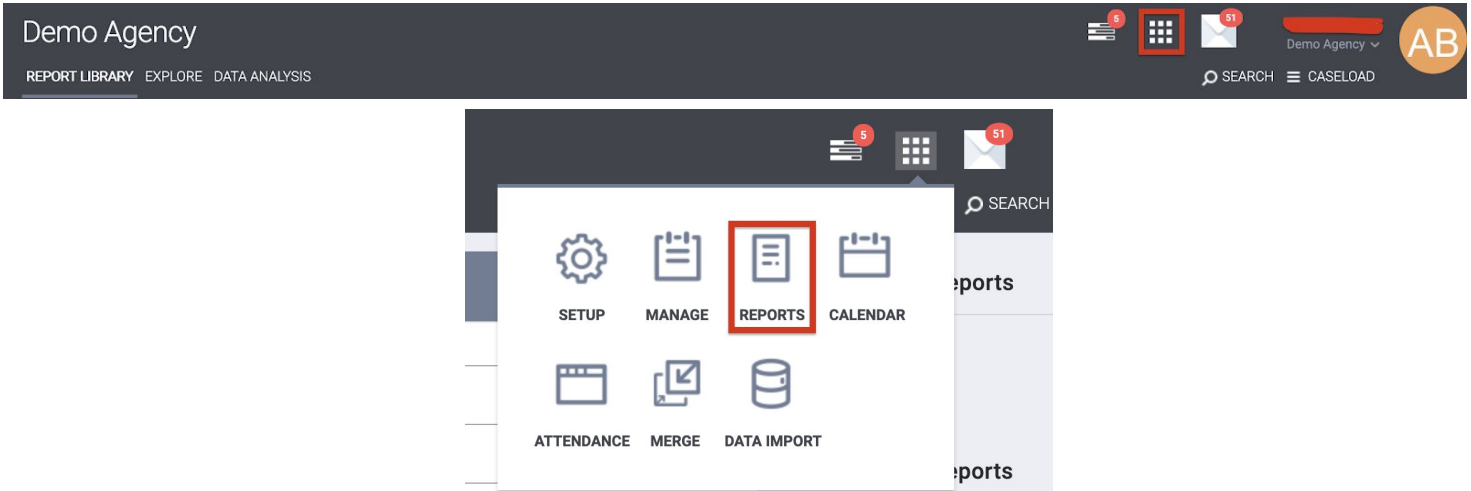
- I. **[GNRL-106] Program Roster Report:** Run the Program roster report and use it to ensure households are configured correctly and there are no duplicate clients.
- II. **[HUDX-225] HMIS Data Quality Report:** Use this report to check data quality based on the HUD Data Standards. The HUD Data Quality questions are directly comparable with the APR. Question 1 (Q1) of this 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 run.

[HUDX-225] HMIS Data Quality Report Categories relevant to the APR submission:

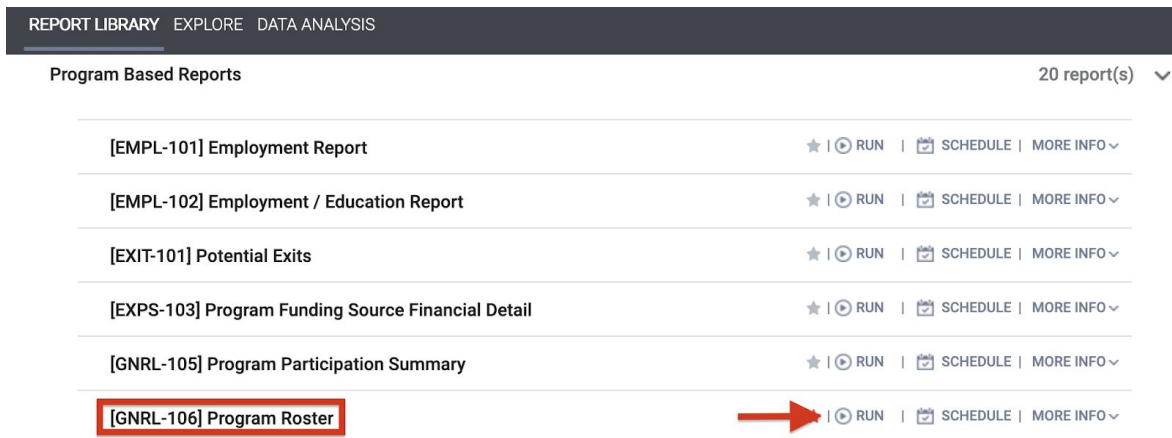
- a. Q1: Number served/ Number of Chronic Homeless
 - b. Q2: Personal Identifying Information
 - c. Q4: Income and Housing Data Quality
 - d. Q5: Chronic Homeless
- III. **[HUDX-227] Annual Performance Report [FY 2020]:** Run APR as a web page for further verification (select number to drill down).
 - IV. **Uploading APR to SAGE:** Run APR in “CSV-Upload” report format and prepare for upload to SAGE

I. Program Roster Report

1. Click on the launcher and select Reports



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 date range for the report
 - d. **Report Output Format** - Select the format as either Web Page (will allow drill down), PDF or Excel (will provide the most details)
5. **Submit**

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 above for instructions)
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**

HUD Reports	9 report(s) ▼
[HUDX-106] HUD Veteran By-Name List	★ <input type="radio"/> RUN <input type="radio"/> SCHEDULE
[HUDX-111] HUD CSV / XML Program Data Export	★ <input type="radio"/> RUN MORE INFO ▼
[HUDX-222] Homeless TAY	★ <input type="radio"/> RUN <input type="radio"/> SCHEDULE MORE INFO ▼
[HUDX-224] PATH Annual Report [Oct 2020 Update]	★ <input type="radio"/> RUN <input type="radio"/> SCHEDULE MORE INFO ▼
[HUDX-225] HMIS Data Quality Report [FY 2020]	★ <input type="radio"/> RUN <input type="radio"/> SCHEDULE MORE INFO ▼

3. Select Run
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 CSV
 - g. **Submit**-will run the report



**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

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.*

II.A. HUD Definition of Chronic Homelessness

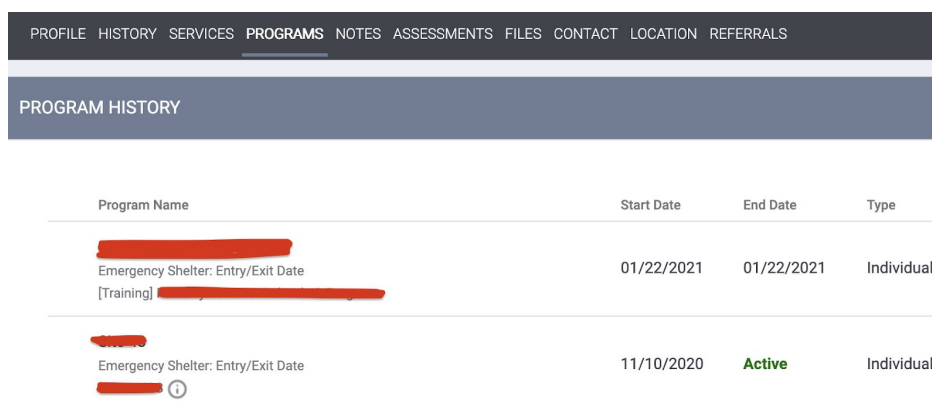
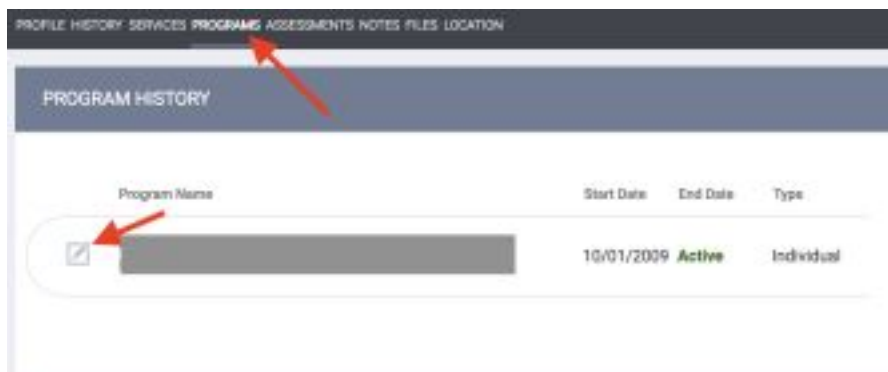
1. A “homeless individual with a disability,” as defined in the Act, who:
 - Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and
 - Has been homeless (as described above) continuously for at least 12 months or on at least 4 separate occasions in the last 3 years where the combined occasions must total at least 12 months
 - Occasions separated by a break of at least seven nights
 - Stays in institution of fewer than 90 days do not constitute a break

2. An individual who has been residing in an institutional care facility for fewer than 90 days and met all of the criteria in paragraph (1) of this definition, before entering that facility; or

3. A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraphs (1) or (2) of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

II.B. 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 edit button. Upon selection it will take you to the next screen.



6. The enrollment screen will then populate.
7. Proceed to enter and/or update any questions as necessary.

II.B.a. 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”

Program Service History

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).

PRIOR LIVING SITUATION

Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu	✓
Length of Stay in Prior Living Situation	One year or longer	▼
Approximate Date Homelessness Started	09/25/2018 	
Number of times on the streets, in ES, or Safe Haven in the past three years	Three Times	▼
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Three Months	▼
Zipcode		
Quality of Zip Code	Full or Partial Zip Code Reported	▼

II.B.b. 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. 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 collect <input type="button" value="v"/>			
Physical Disability	Yes <input type="button" value="v"/>	Long Term	No <input type="button" value="v"/>	
Developmental Disability	No <input type="button" value="v"/>			
Chronic Health Condition	Yes <input type="button" value="v"/>	Long Term	No <input type="button" value="v"/>	
HIV - AIDS	No <input type="button" value="v"/>			
Mental Health Problem	No <input type="button" value="v"/>			
Substance Abuse Problem	Alcohol Abuse <input type="button" value="v"/>	Long Term	Yes <input type="button" value="v"/>	

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.*

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [NOTES](#) [ASSESSMENTS](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

CLIENT PROFILE

Social Security Number	XXX - XX - XXXX <input type="button" value="v"/>	 <div style="background-color: #eee; padding: 5px; font-size: 0.7em; margin-top: 10px;"> UNIQUE IDENTIFIER FD9B61683 </div> <div style="background-color: #eee; padding: 5px; font-size: 0.7em; margin-top: 5px;"> COMMUNITY QUEUE </div>
Quality of SSN	Approximate or partial SSN reported <input type="button" value="v"/>	
Last Name	Shark	
First Name	Christopher	
Quality of Name	Partial, street name, or code name reported <input type="button" value="v"/>	
Quality of DOB	Approximate or partial DOB reported <input type="button" value="v"/>	
Date of Birth	01/01/2000	

Adult Age: 21

C. 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.

Program Name	Start Date	End Date	Type
Emergency Shelter: Entry/Exit Date [Training]	01/22/2021	01/22/2021	Individual
Emergency Shelter: Entry/Exit Date	11/10/2020	Active	Individual

PROFILE HISTORY SERVICES **PROGRAMS** NOTES ASSESSMENTS FILES CONTACT LOCATION REFERRALS

PROGRAM: AWESOME RRH

Enrollment History **Assessments** Notes Files Forms × Exit

Assessments

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 Annual Assessment Date within +/- 30 days of the Program Start Date (Annual Assessment 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 Annual Assessment Date must be recorded annually within +/- 30 days of the anniversary of the client's Program Start Date.

Enrollment History **Assessments** Notes Files Forms × Exit

Assessments

- Status Update Assessment START
- Annual Assessment START

ASSESSMENT HISTORY

Advanced Search Options View

Assessment Name	Completed	Details
Annual Assessment	07/01/2019	

Program Start Date: 07/01/2018

Assigned Staff: [Redacted]

Head of Household: [Redacted]

Program Group Members

No active members

Status Assessments +

Assessment Due - July 1st 2020

07/01/2019 ANNUAL

Assessment due every year
Notification: ON

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 an Annual Assessment Date recorded within +/- 30 days of the client's Program Start Date and within the APR reporting date range.

Enrollment History **Assessments** Notes Files Forms × Exit

Add Annual Assessment for client XXXXXXXXXX

Project Status Date 

Is the Program Type a Permanent Housing Program Type? ▼

DISABLING CONDITIONS AND BARRIERS

Physical Disability ▼ Long Term ▼

Developmental Disability ▼

III. Using [HUDX-227] Annual Performance Report [FY 2020]

Use a test APR to check on data quality issues listed below. The report sections are identified with a subheader. 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-227] Annual Performance Report [FY 2020]**

HUD Reports > [HUDX-227] Annual Performance Report [FY 2020]

Coc Filter Category: Agency CoC

CoC: CA-501 - San Francisco CoC

Program Type(s): Choose...
 All
 Emergency Shelter
 Transitional Housing
 PH - Permanent Supportive Housing (disability required)

Program Status: All Programs

Program(s): Choose...
 All
 Arches Navigation Center
 Big Bend RRH
 Denali Transitional Housing

Apply Client Location filter: No

LEGACY FEATURE: SERVICE BASED FUNDING SOURCE

Funding Criteria: Not Based on Funding Source

Funding Status: Choose...

Funding(s): Choose...

Report Date Range: 11/01/2019 - 10/31/2020

Report Output Format: Web Page PDF Excel CSV-Details CSV-Upload

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)
 - a. If your programs are part of the Integrated Service Network (ISN), you must choose the correct funding sources for the programs you are reporting on
6. If checking data use the Web Page Output Format
7. **If you have checked your data and are ready to upload a test, select the CSV-Upload option**
8. Upload your test APR at <https://demo.sagehmis.info/us/csvtest.aspx>

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

IV. Uploading APR to SAGE

1. From the launcher select the **REPORTS** option
2. From the **REPORT LIBRARY** select the HUD Reports
3. Select **[HUDX-227] Annual Performance Report [FY 2020]**
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-227] Annual Performance Report [FY 2020]

Coc Filter Category Agency CoC

CoC CA-501 - San Francisco CoC

Program Type(s)

Choose...

All

Emergency Shelter

Transitional Housing

PH - Permanent Supportive Housing (disability required)

Program **Hold CTRL or Command to select multiple programs**

Program(s)

Housing Ladder

Problem Solving

Street Outreach Program

Yellowstone Congregate Shelter

Zion Housing

6. Select **CSV-Upload** as the output format

Report Output Format Web Page PDF Excel CSV-Details **CSV-Upload**

7. Select the **SUBMIT** button
8. Download the csv package.
9. Upload the csv package to SAGE- <https://www.sagehmis.info>

Helpful Tip:

You can Test the report without making an account

*If you do not have a SAGE account **connect with your HSH Program Manager to request a new account***

[Click here for more information](#)

For Further Assistance:

Clarity Human Services Help Center - <https://get.clarityhs.help/>

Bitfocus OneSF HMIS Helpdesk - <https://onesf.bitfocus.com/onesf@bitfocus.com>

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