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
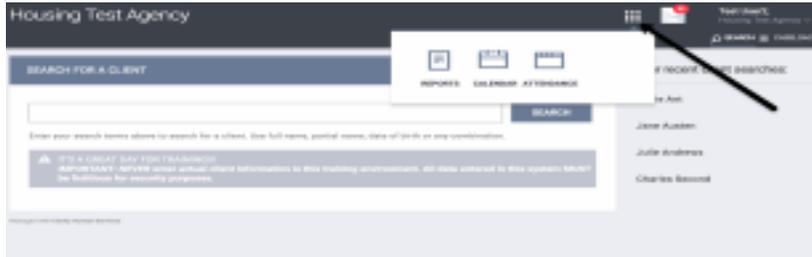https://onesf.clarityhs.help
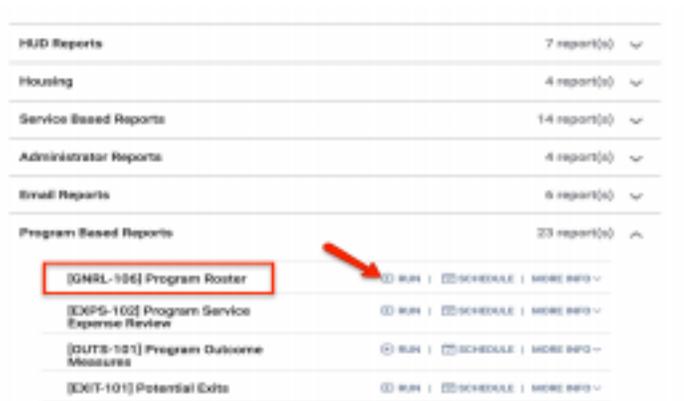onesf@bitfocus.com
(415) 429.4211

I. Program Roster Report

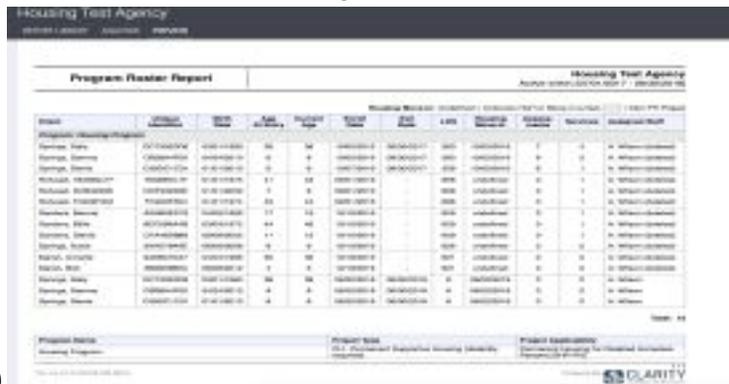1. Click on the launcher and select Reports (see image)

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)

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.
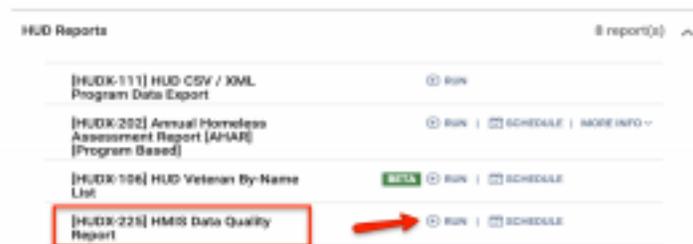
II. Data Quality Report (DQ) Section 1

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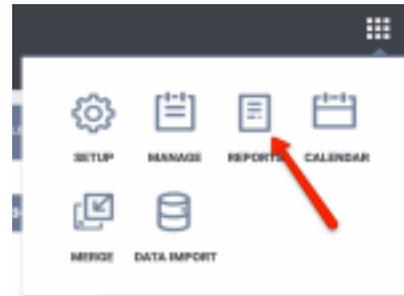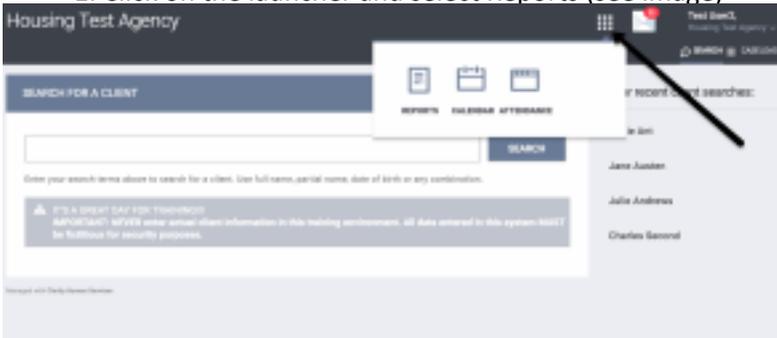
2. From the Report Library select **HUD Reports;** this will roll out the report options under this category-select report number **[HUDX-225] HMIS Data Quality Report** (see image)

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

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

![Bitfocus]

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

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).
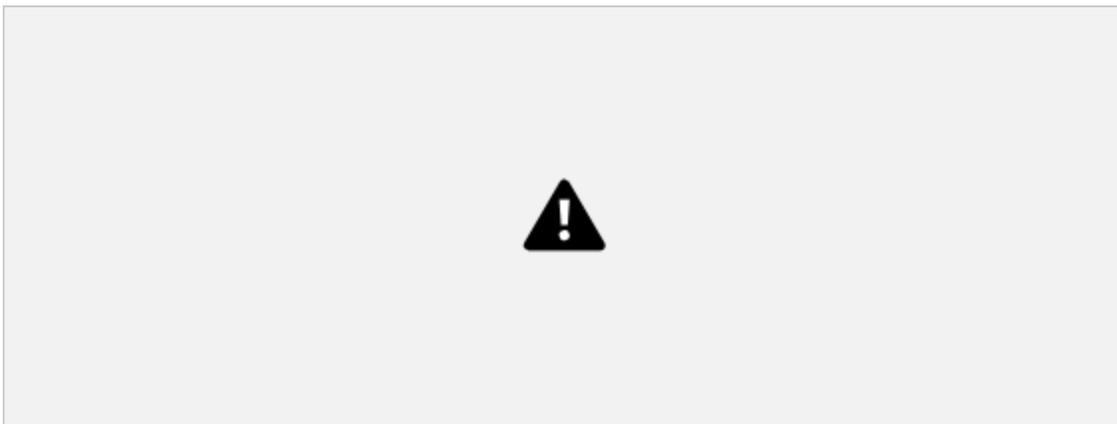

Disabling Conditions

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).
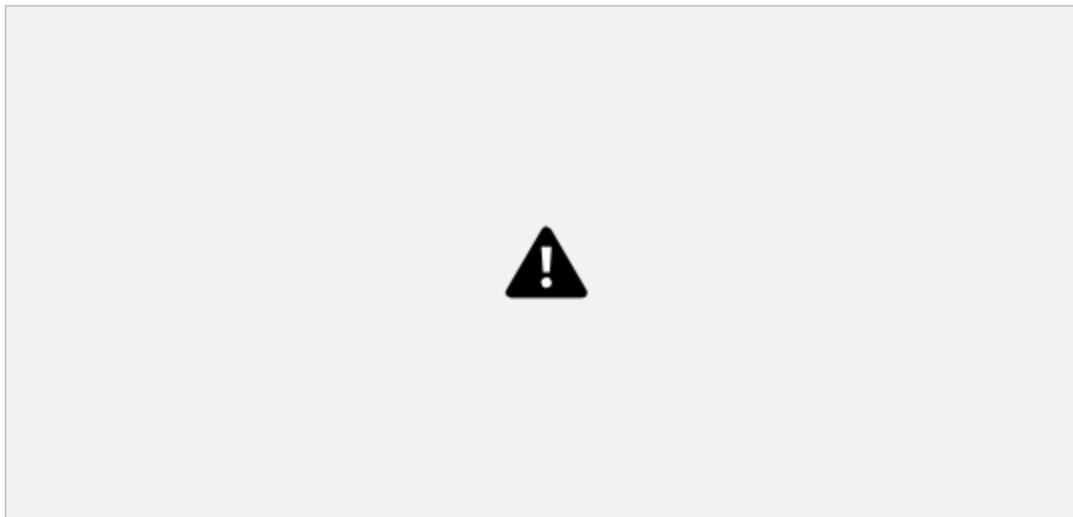
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Data Quality Report (DQ)-Continued

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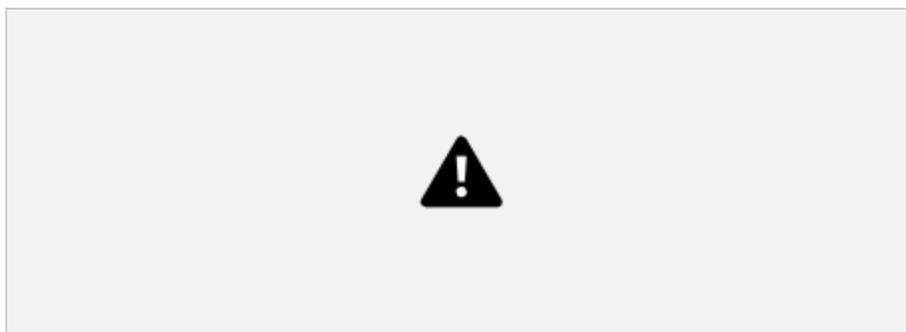- Quality of Name/SSN, Blank, Data Not Collected

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.

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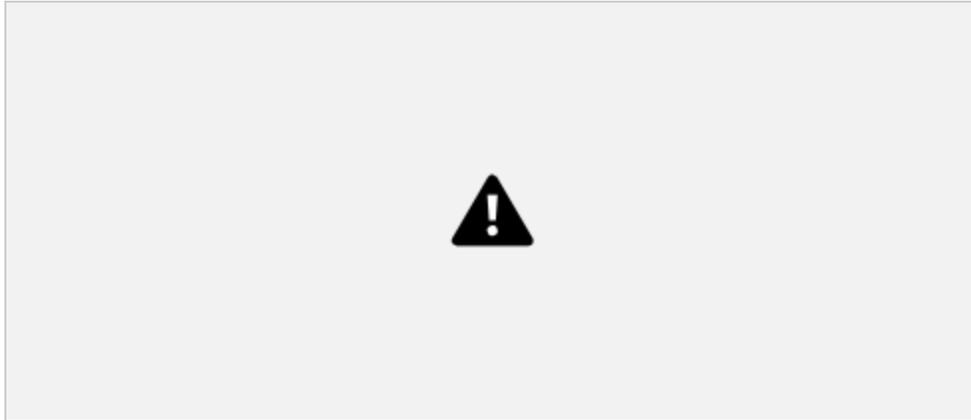
D. DQ Q4/ APR Q6c. Data Quality: Income and Housing Data Quality

To access the **Annual Assessment** steps 1-7 on page 6 of this document. Select the **Assessments** subtab from the options.
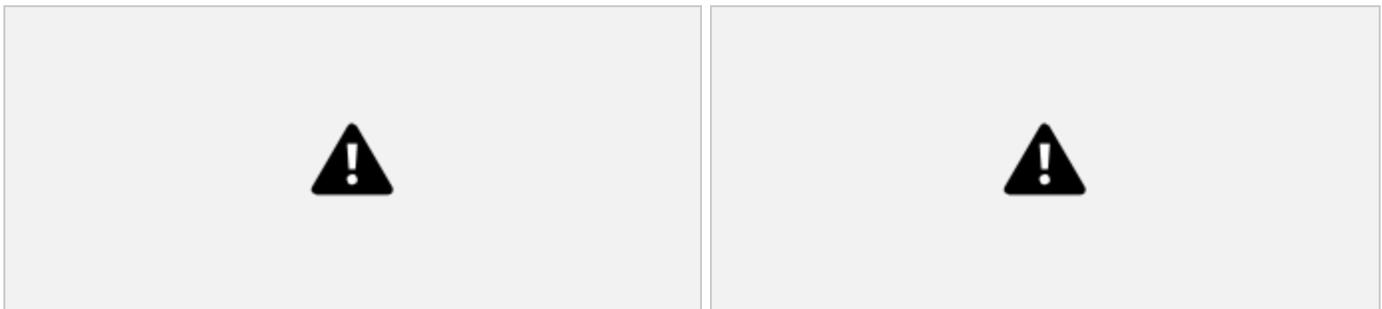
Assessment errors may be related to a client not having an assessment completed within the APR report date range. **(#1) Review the recorded Assessments**. If there is no assessment recorded within the APR date range, complete a new assessment and **(#2) record the Project Status Date within +/- 30 days 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 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.
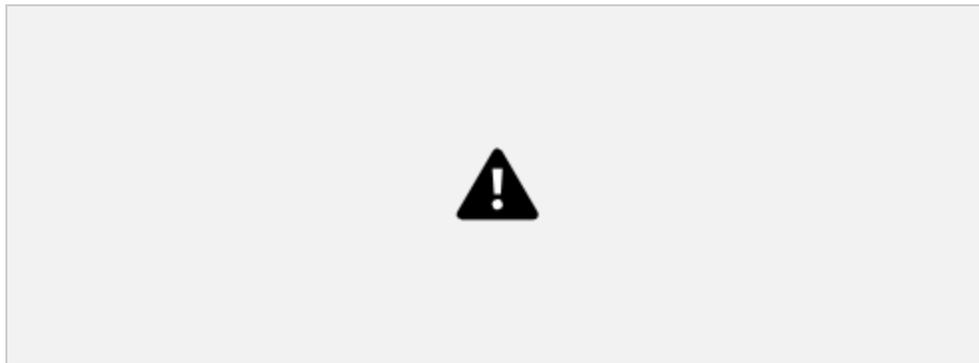
III. Data Quality Report (DQ) Section 2

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
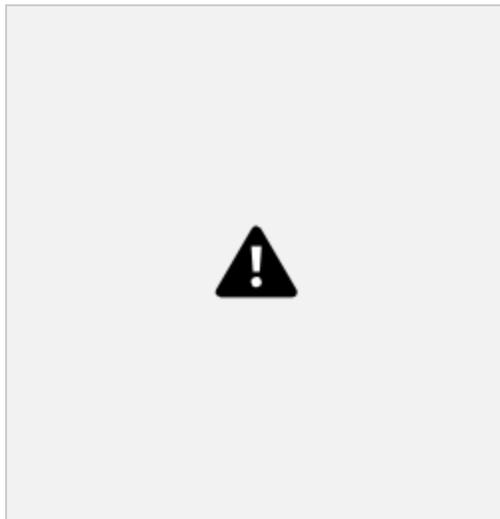
8. You have the ability to download these reports and rename and save to a directory of your choice **Helpful Tip:** *Please note that when downloading as a CSV-Upload file it will be in a folder that will contain each question separately. This is intentional.*
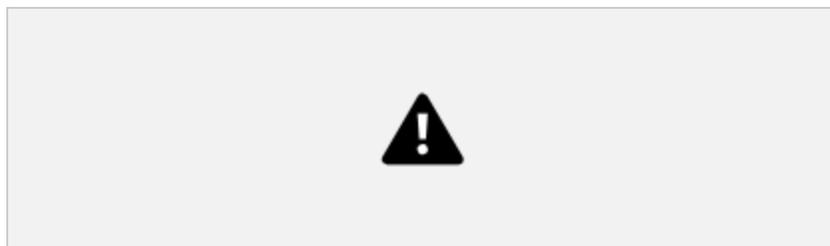
CSV-UPLOAD APR Export in Excel

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]**
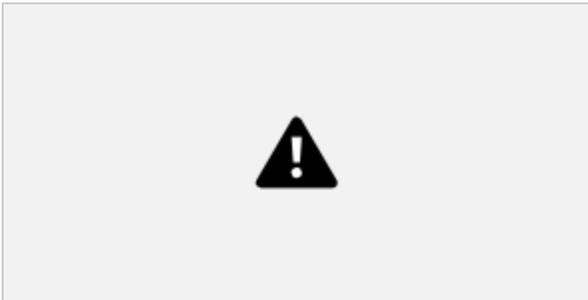

4. Select RUN, this will populate a new screen from the Report Library
5. Enter the filters you will use to run the report(s)
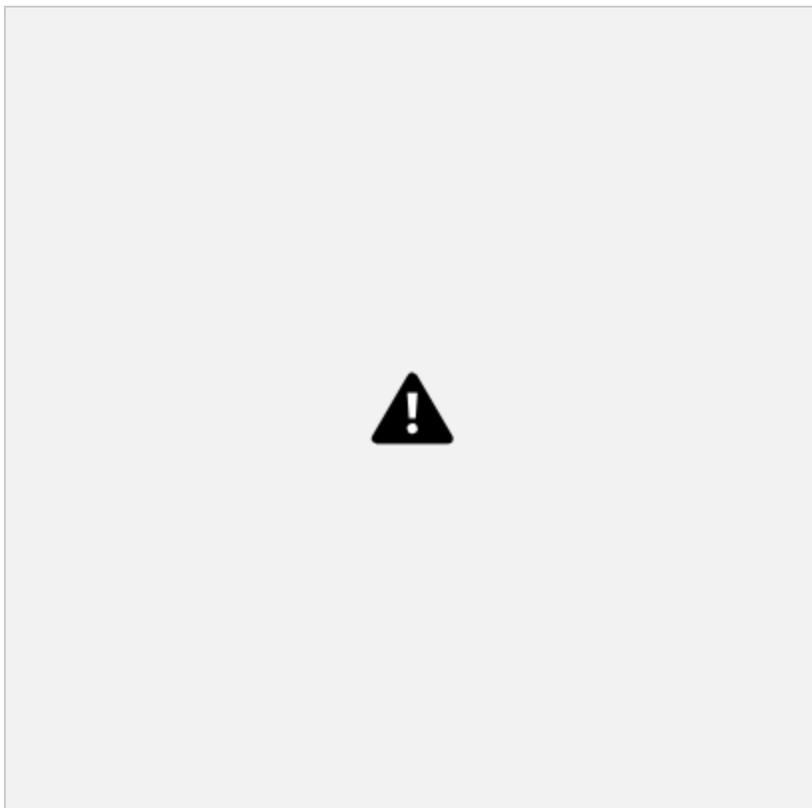
6. Select the **SUBMIT** button

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)

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