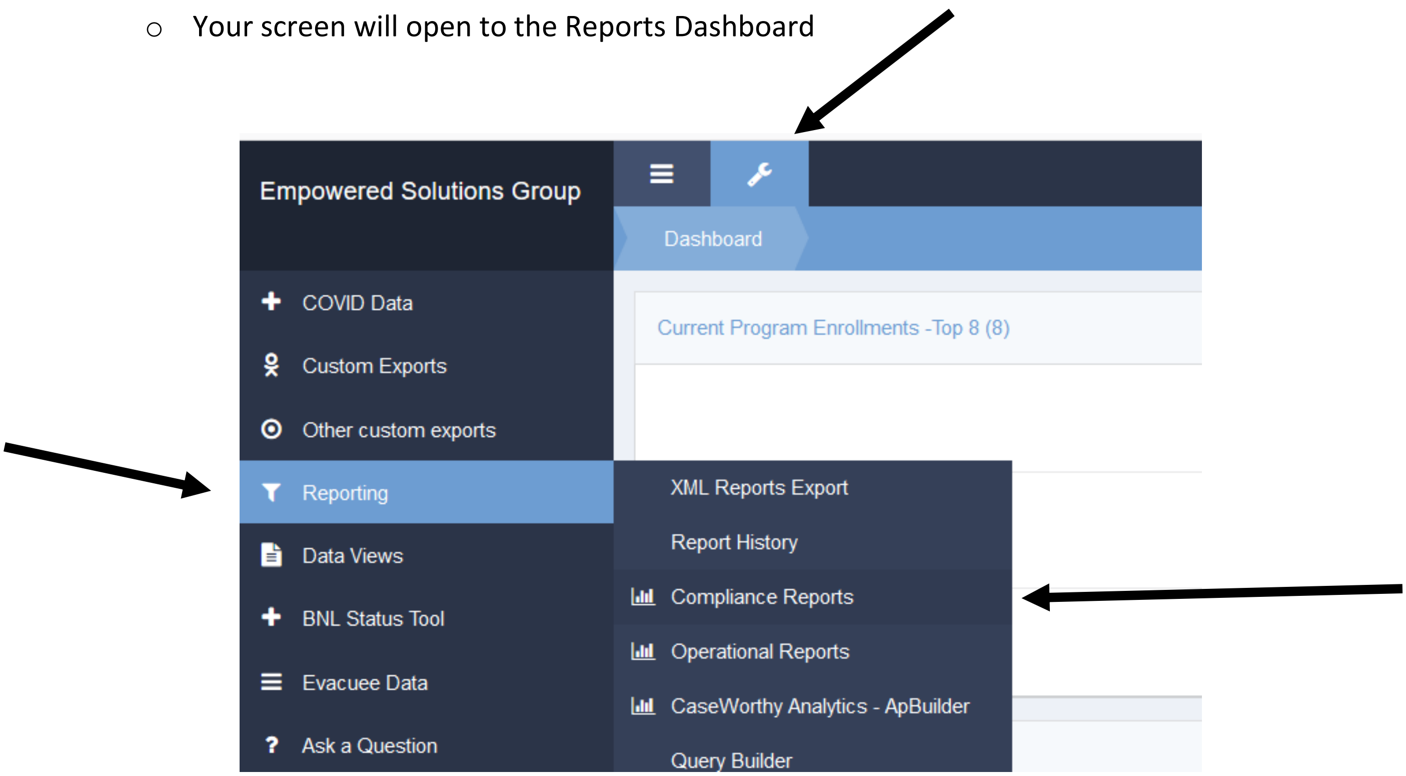
How to Run an Annual Performance Review (APR) Report in HMIS

Last Updated: September 2020

Login to the Reports

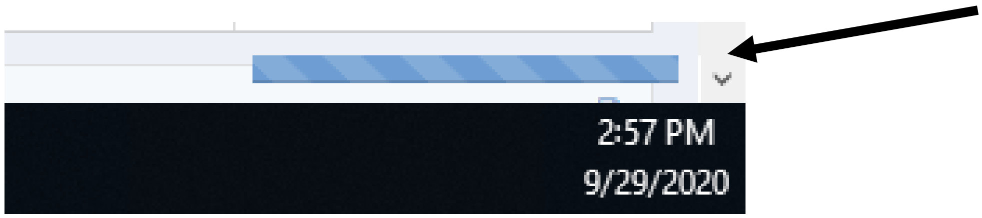
- Be sure you are logged in to your correct Role
- Roles vary by end-user and your supervisor should be able to tell you what Role you should use

- Click on the **wrench icon** on the top left of the screen
- Click on **Reporting** on the left panel
- From the drop down menu click on **Compliance Reports**
  - Your screen will open to the Reports Dashboard

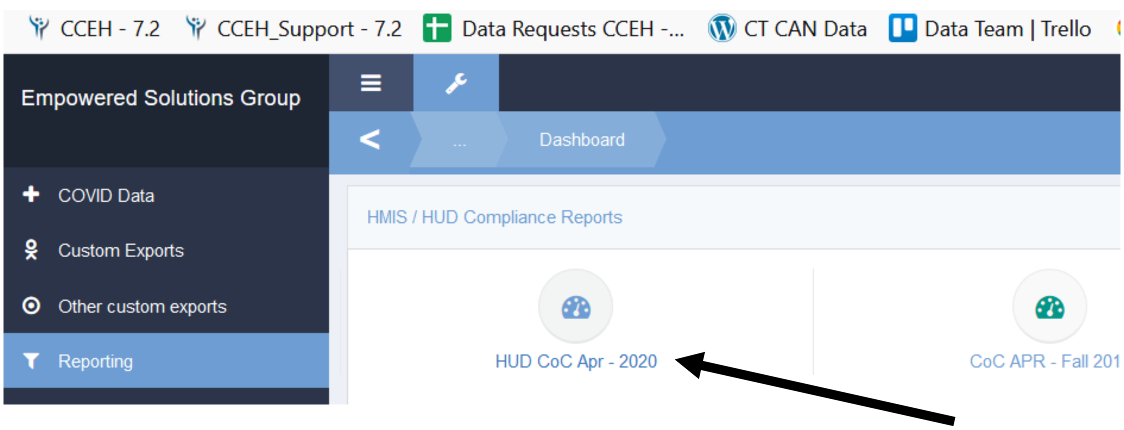


- There is a lag in HMIS so it may take a few seconds for the screens to load as you move through the report process

- You can see a blue or red **processing bar** in the lower right corner of the screen indicating that the screen is not yet fully loaded
  - The bar will disappear when the next screen is loaded



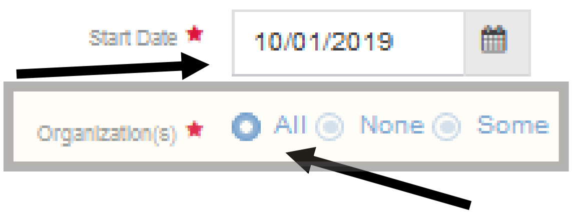
Once the **Reports Dashboard** screen has loaded you'll see the icon for the **HUD CoC Apr - 2020 Report**

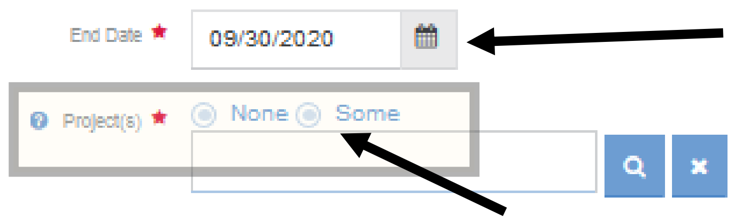


Enter Report Parameters

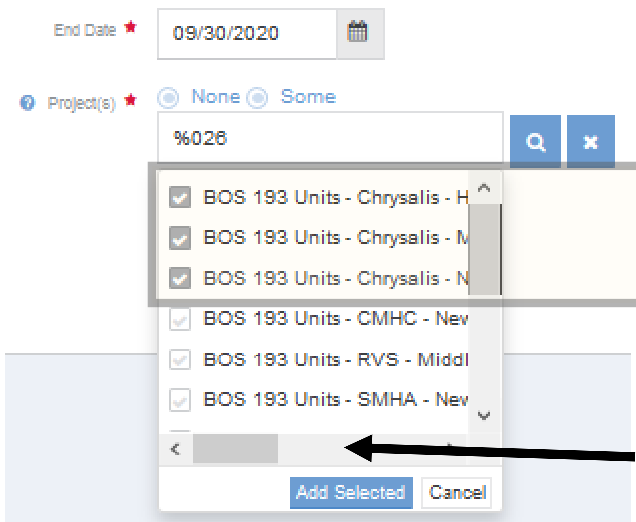
- Enter your **start and end dates**
- Most often you will be reporting for a fiscal year 10/1/YYYY - 9/30/YYYY
  - End users should be sure to enter the desired date range for the specified reporting period
- The **Organization(s)** radio button can be left on **All**
- You can change the radio button to **Some** and enter the name(s) of specific Organizations

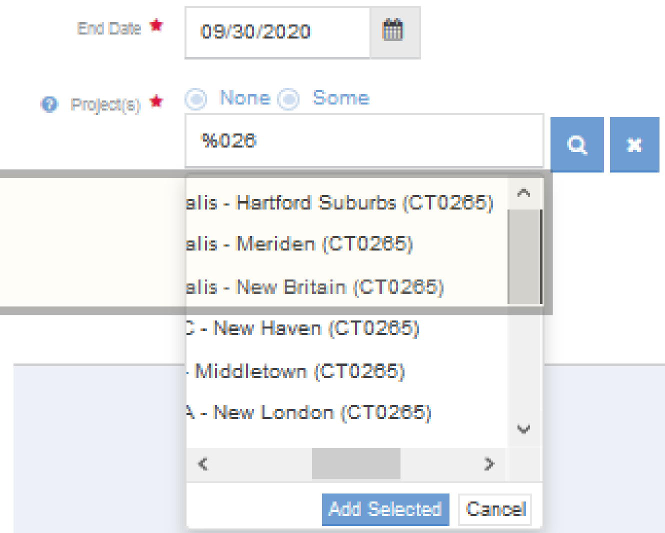
- The process for entering Organization names is exactly the same as entering the Project(s) name(s)
  - For the APR Organization(s) is usually set to All
- You will have to add each **Project name** individually to the report
  - Set the Project(s) radio button to **Some**



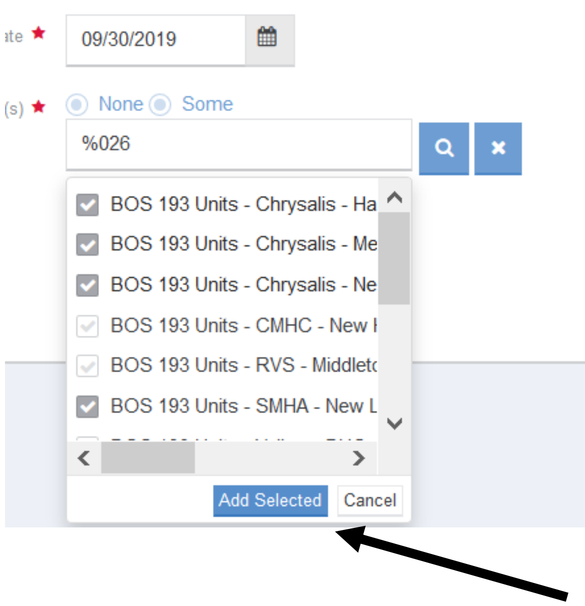


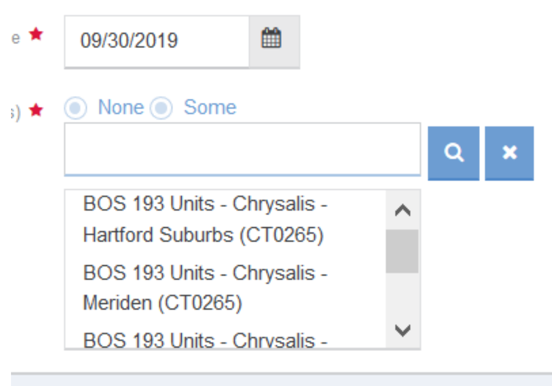
- Use a wildcard search to locate the Project name or number
  - Searching by number is more efficient
- The **wildcard symbol %** and can be used at the start, middle, or end of your text or number search
  - **%Chry** **or** **%Chrysalis** **or** **%0265**
- The screen is very small and you will have to scroll back and forth to see the full Project name
  - The Project name starts on the left but you'll have to scroll to the right to see the rest of the name
  - Once you see the Project you need you can click on it no matter which side of the scroll bar you are on
- Clicking on the Project name will add a check mark on the left



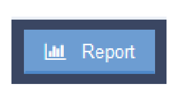


- Click on **Add Selected** to load the checked off Project names into the report
  - You can select the names all at once or a few at a time
- Review all of the Project names before you run the report
  - If you added a Project you do not need you can remove it by clicking on the name



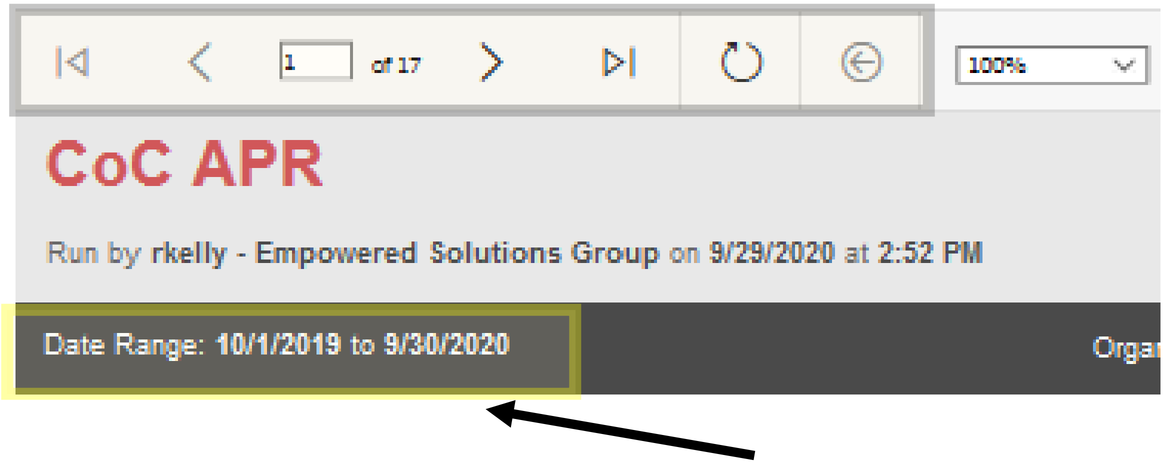


- Use the **Report** icon in the lower right corner of the screen to run the report

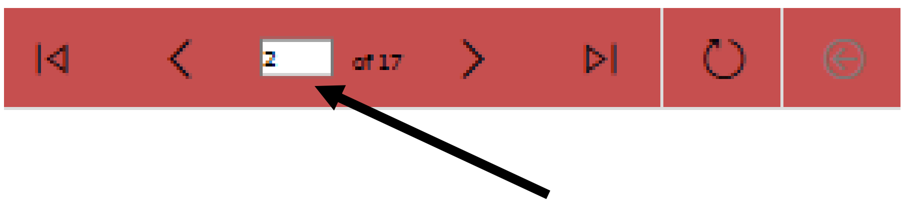


  - It will take a few seconds to a few minutes for the report to load depending on the size

- When the report opens check to be sure the **date range** in the upper left side of the report is correct
- The **navigation arrows and icons** are on the top left side of the screen
    - Use these to navigate through the report pages



- Go to **page 2** of the report where you will see 2 hyperlinks



Client Detail Sub Report

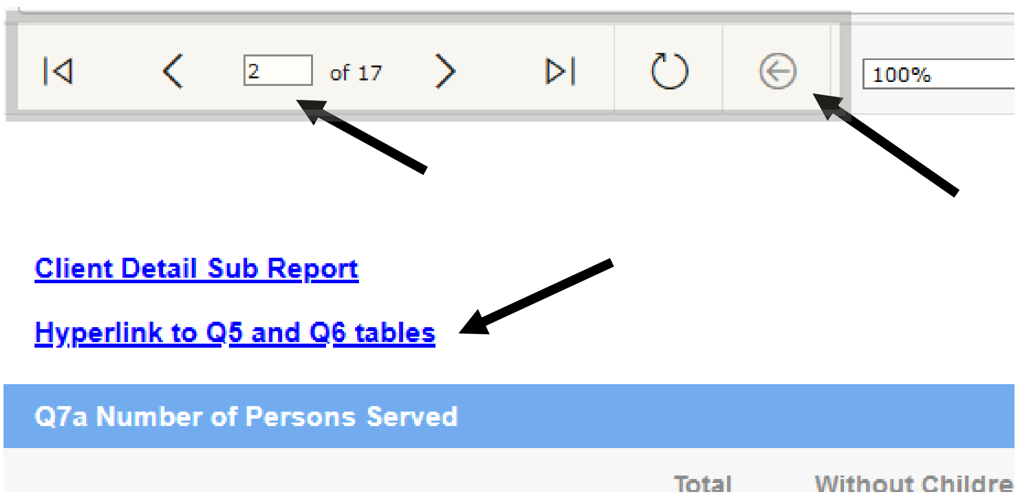
Hyperlink to Q5 and Q6 tables

- The **Client Detail Sub Report** link opens a report for all clients within the parameters
    - This can be used if you want to review aggregate or high-level information for all clients

- The **Hyperlink to Q5 and Q6 tables** will bring you to **only those** clients with data issues
- For the APR we are only going to focus on clients with data issues

- Click on the **Hyperlink to Q5 and Q6 tables**
    - This will bring you to tables Q1 – Q7 data quality tables

- If you have to return to the main report use the **Return to Parent report icon** – the arrow pointing to the left inside of a circle
  - If you use your computer's back button you'll be taken all the way out to the login page



- Once the tables page opens you can **export the report** to Excel or other format
- Use the disk icon drop down to select your export format
- Once the report processes you can open or save it