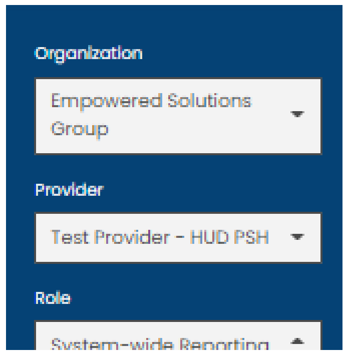
How to Run and Annual Performance Review (APR) Report in HMIS

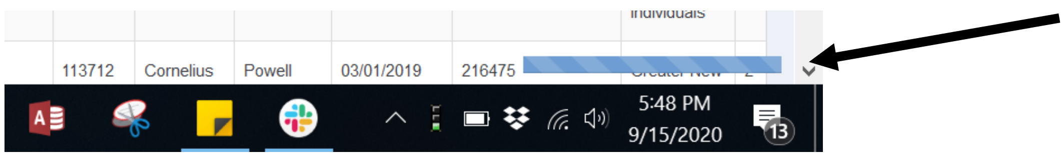
Last Updated: January 2022

Login to HMIS

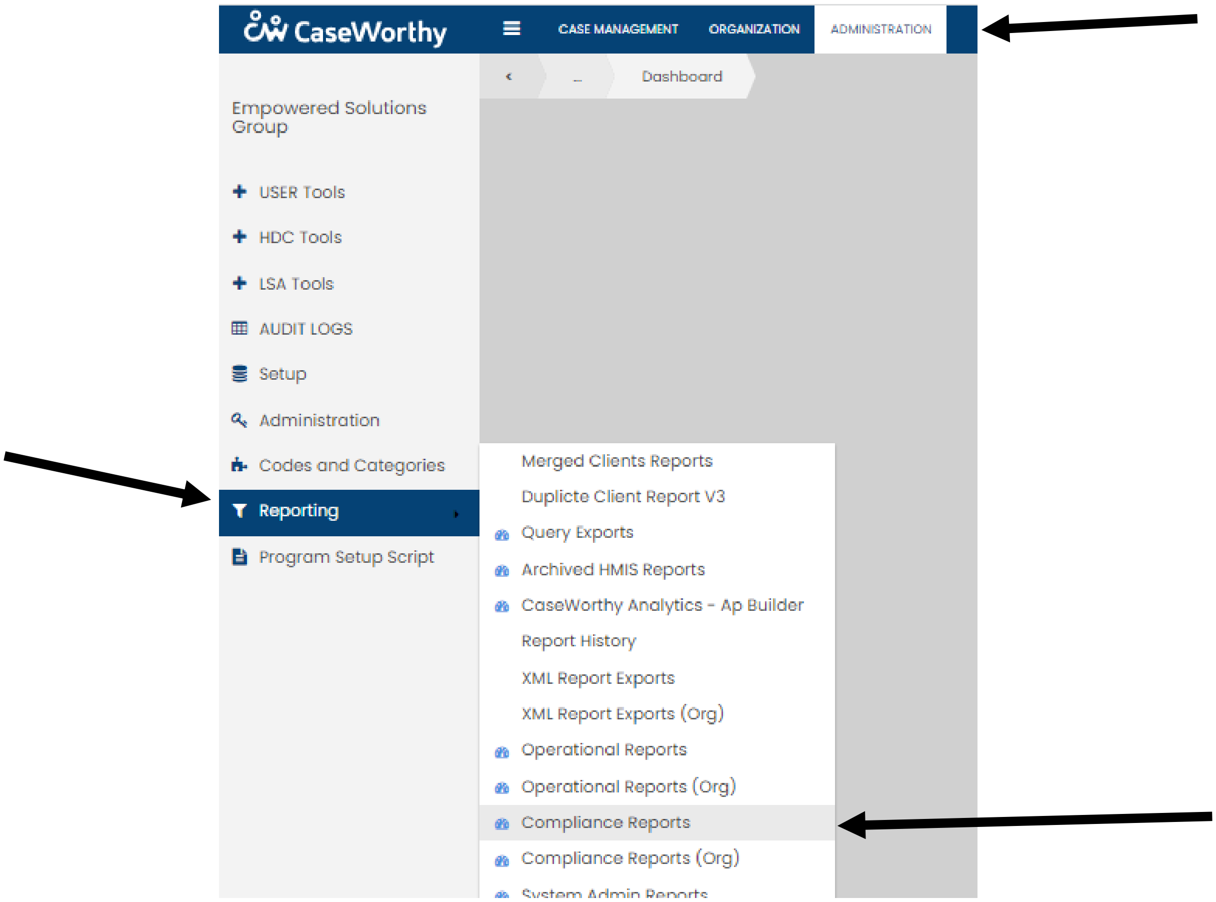
- Be sure you are logged in to your correct Organization, Provider, and Role
- These vary by user and your supervisor can tell you what selections you should use



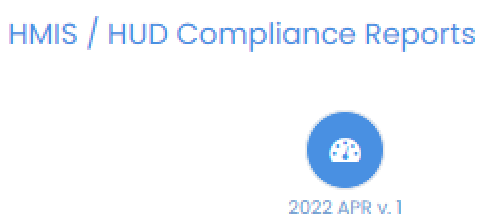
- There is a lag in HMIS so it may take a few seconds for the screens to load as you move through the report process
    - You can see a **processing bar** in the lower right corner of the screen indicating that the screen is not yet fully loaded
    - The bar will disappear when the screen is loaded completely



- Click on **Administration** 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

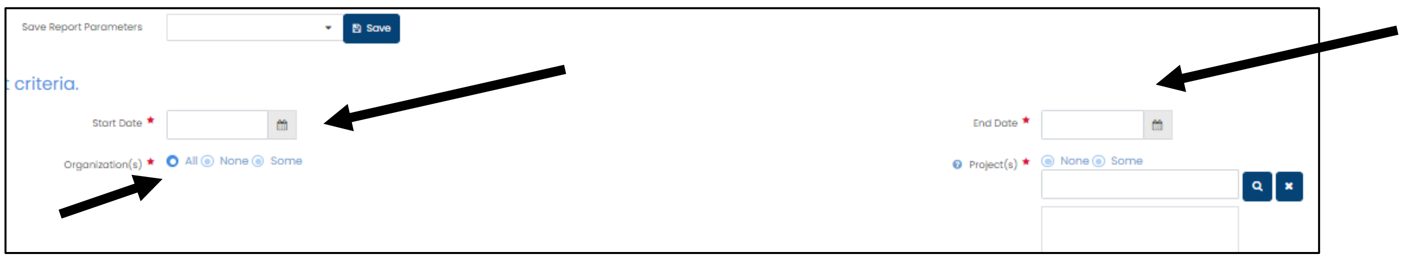


Once the **Reports Dashboard** screen has loaded you will see the icon for the **2022 APR v.1** to open



Enter Report Parameters

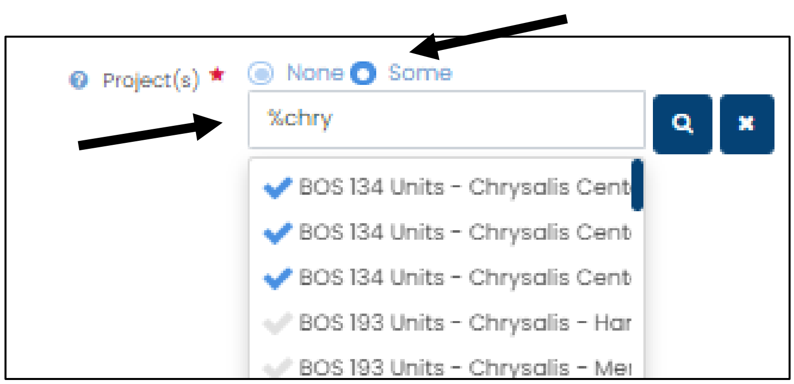
- Enter your **start and end dates**
- Most often you will be reporting for the federal fiscal year 10/1/YYYY - 9/30/YYYY
    - You can use a different date range if you want to look at a specific point in time



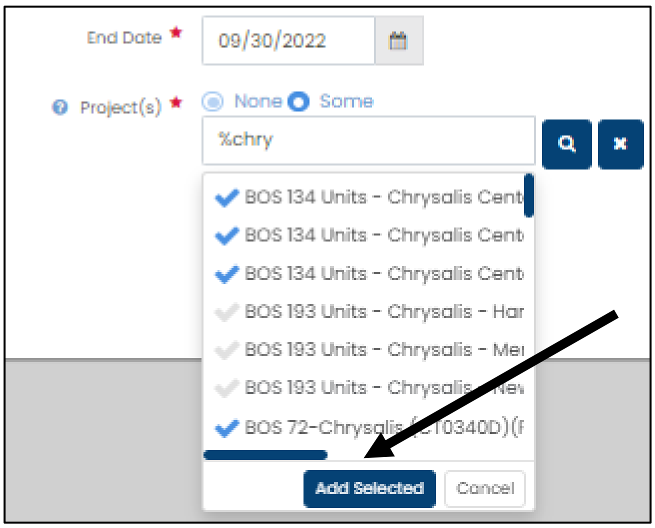
- The **Organization(s)** radio button on the left defaults to **All**
- You can change the radio button to **Some** and enter the name(s) of specific Organizations
    - The process for entering Organization names is exactly the same as entering the Project(s) name(s) in the instructions below if you only want to look at some Organizations
    - The recommendation is to leave it set on All

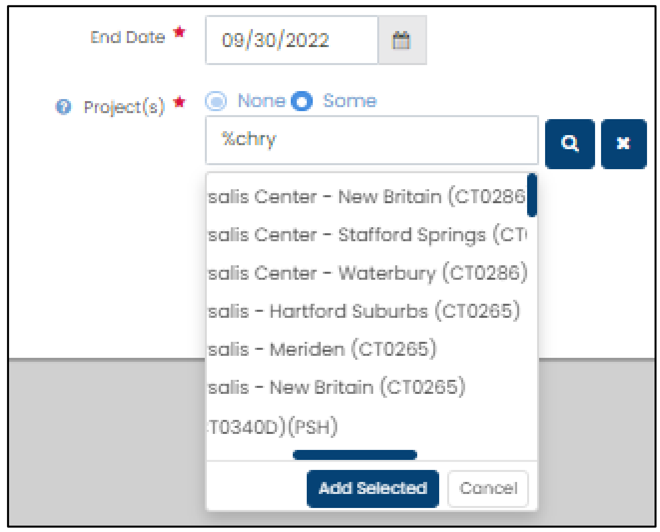
- You will have to add each **Project name** individually to the report
    - Set the Project(s) radio button to **Some**

- 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**



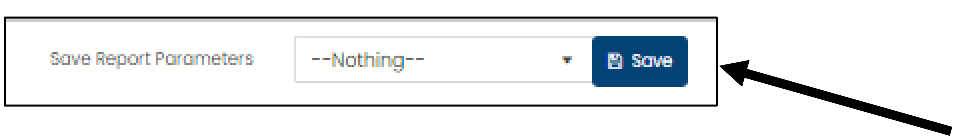
- The screen is very small and you will have to use the scroll bar to see the full Project name
    - The Project name starts on the left but you'll have to scroll to the right to see the rest of the name
    - Once you see the Project you need you can click on it no matter which side of the scroll bar you are on



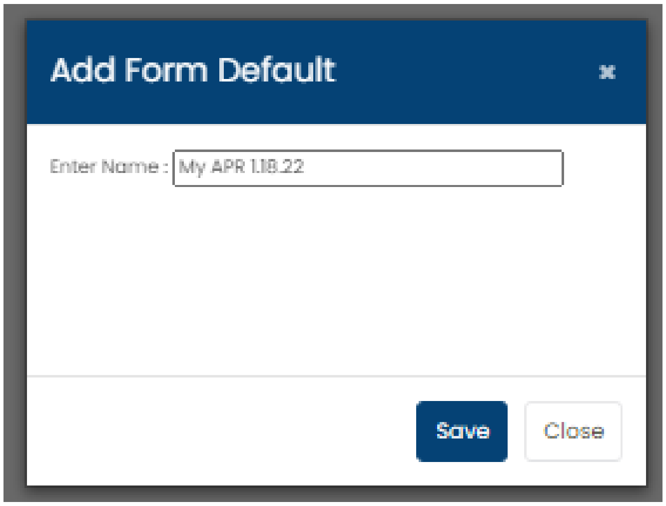


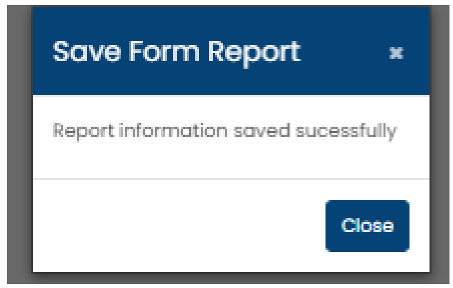
- Clicking on the Project name will add a check mark on the left
- Click on **Add Selected** to load the checked off Project names into the report
    - You can select the names all at once or a few at a time by adding the check mark and then clicking on Add Selected
- Review all of the Project names before you run the report
    - If you added a Project you do not need you can remove it by clicking on the name
        - **You do not get a prompt telling you that you are removing the program** so be careful not to accidently delete a project you have added to the report

- **If you want to save the report parameters so that you don't have to repeat the process:**
    - Once you have loaded the programs and dates, click on the Save button and enter a name in the Add Form Default box for the report and you will get the below popup
        - You may want to include a date in the name so that you know how old the report is over time

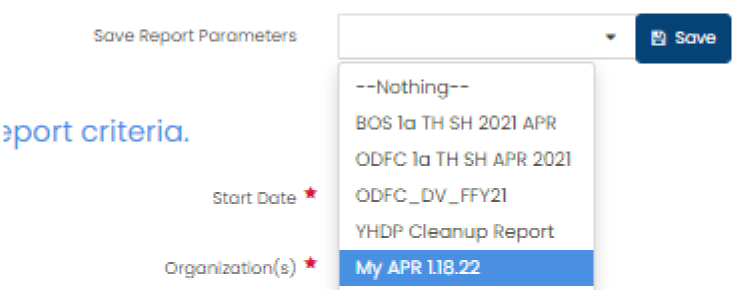


- Click on Save and you'll see a prompt that the report is saved



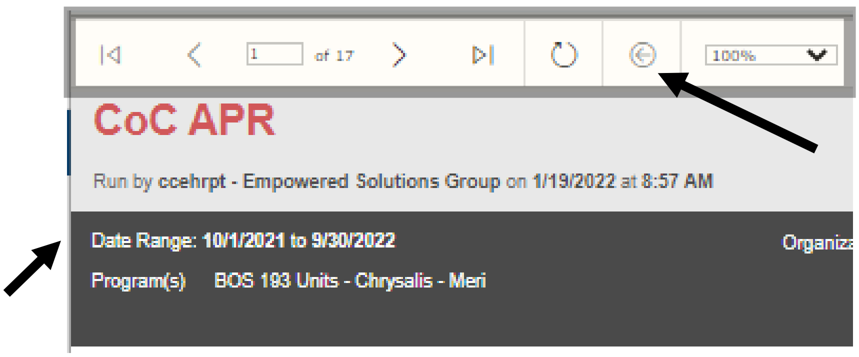


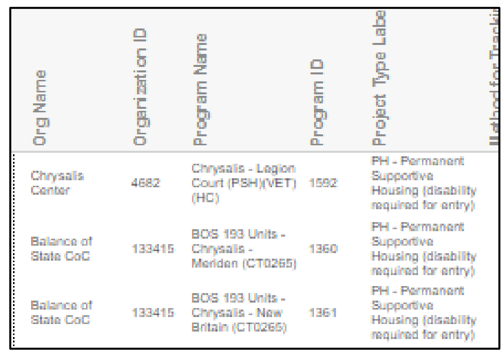
- The next time you need to run the report, go through the steps to open the **2022 APR v.1**
- Once open, click on the down arrow next to the Save button and you will see a list of saved reports
- Select your report and confirm that the criteria is accurate
    - You can change the parameters and click on Save if you need to update the report setup
    - The saved report will always open to the most recent saved changes



- Once the report criteria is confirmed 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
    - You will also see a list of the programs used for the report setup
- Use the **navigation arrows and icons** on the top left side of the screen to navigate through the report pages
- 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 the computer Back button it will take you back to the HMIS login page and you will have to start over**



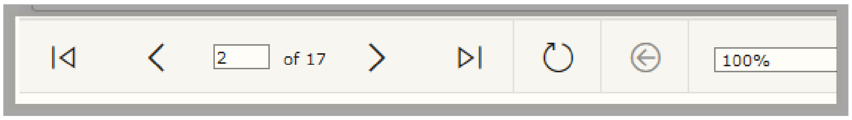


Org Name	Organization ID	Program Name	Program ID	Project Type Labe	Method for Trackii
Chrysalis Center	4682	Chrysalis - Legion Court (PSH)(VET)(HC)	1592	PH - Permanent Supportive Housing (disability required for entry)	
Balance of State CoC	133415	BOS 193 Units - Chrysalis - Meriden (CT0265)	1360	PH - Permanent Supportive Housing (disability required for entry)	
Balance of State CoC	133415	BOS 193 Units - Chrysalis - New Britain (CT0265)	1361	PH - Permanent Supportive Housing (disability required for entry)	

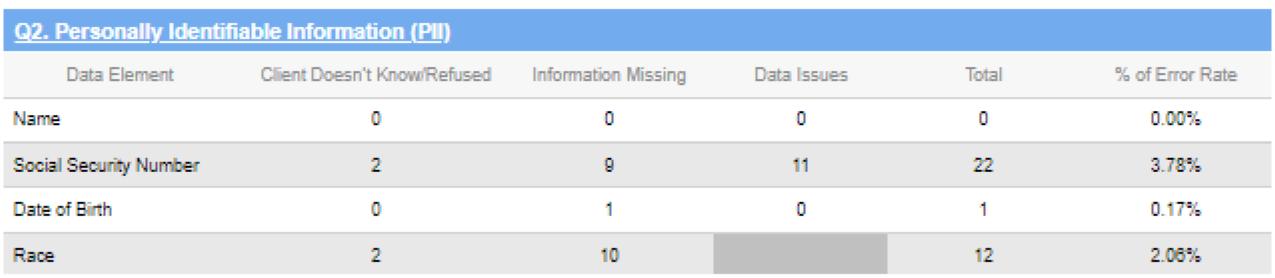
- Navigate to **page 2** of the report using the arrows where you will see 2 hyperlinks

- The **Client Detail Sub Report** link opens a report for all clients within the parameters of the report
    - This can be used if you want to review aggregate or high-level information for all clients
    - **Example:**
        - Enrollment start and end dates
        - Assessment due date range

- Click on the **Hyperlink to Q5 and Q6 tables** to get to the Q1 – Q7 data quality tables



- The titles of the tables are hyperlinks that will open to a client detail report ONLY for the clients with data in the table
  - **Q2. Personally Identifiable Information (PII)** - hyperlink



Q2. Personally Identifiable Information (PII)

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name	0	0	0	0	0.00%
Social Security Number	2	9	11	22	3.78%
Date of Birth	0	1	0	1	0.17%
Race	2	10		12	2.06%

- 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 view or save it