

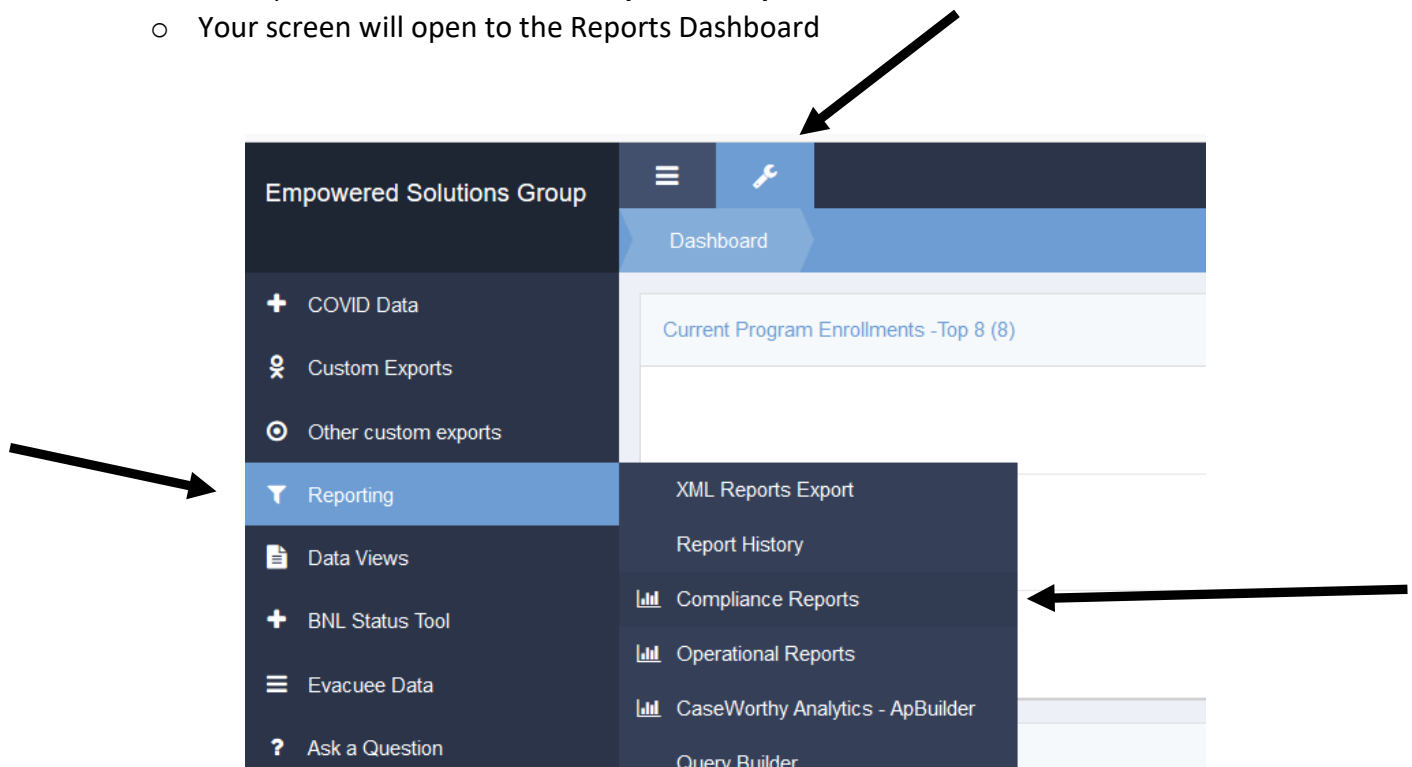
How to Run an Annual Performance Review (APR) Report in HMIS

Last Updated: September 2020

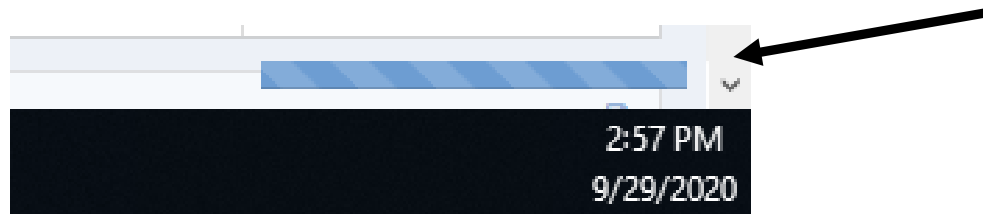
Login to the Reports

- 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

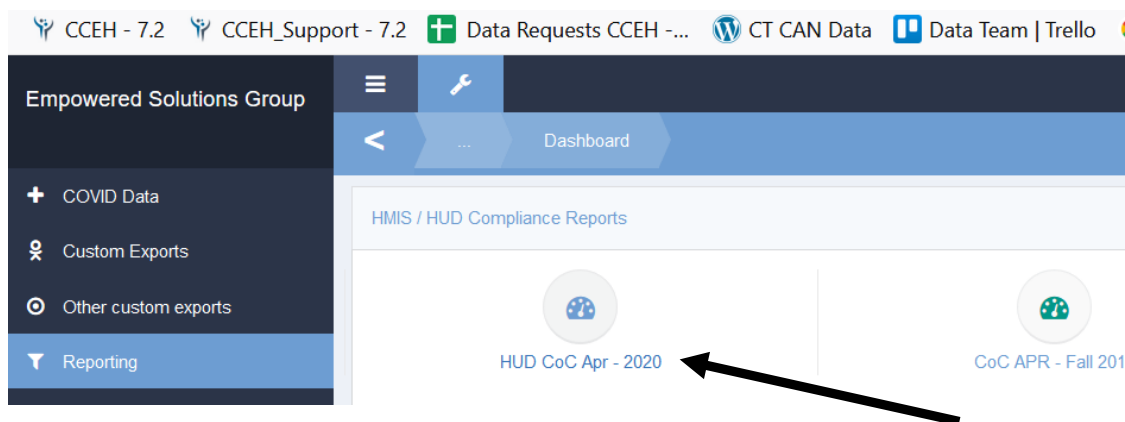
- Click on the **wrench icon** on the top left of the screen
- Click on **Reporting** on the left panel
- From the drop down menu click on **Compliance Reports**
 - Your screen will open to the Reports Dashboard



- 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**



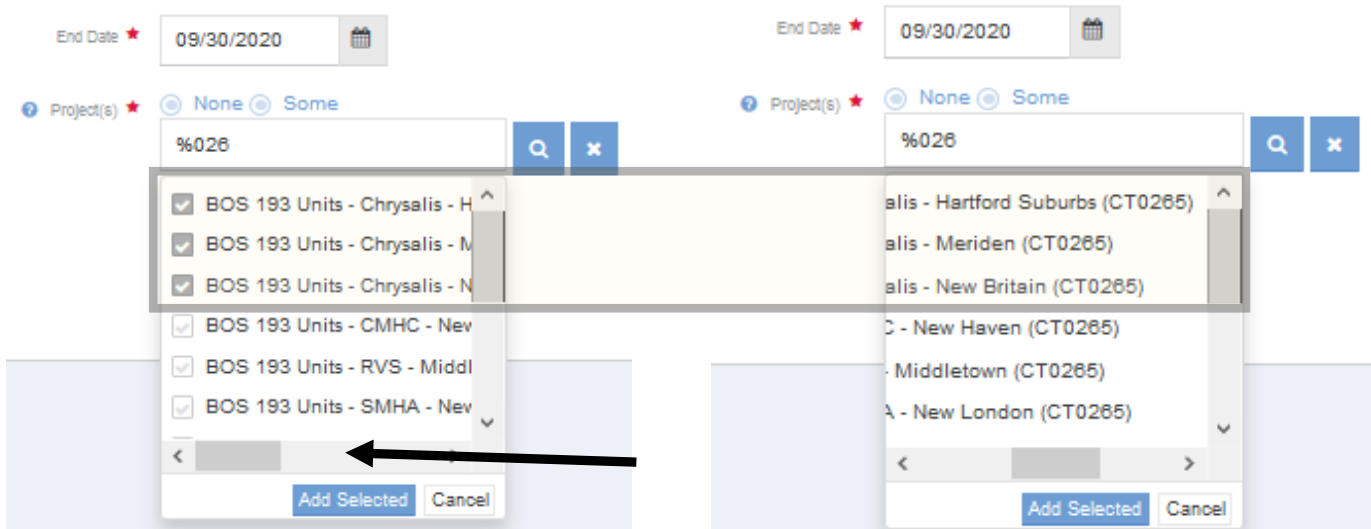
Enter Report Parameters

- 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

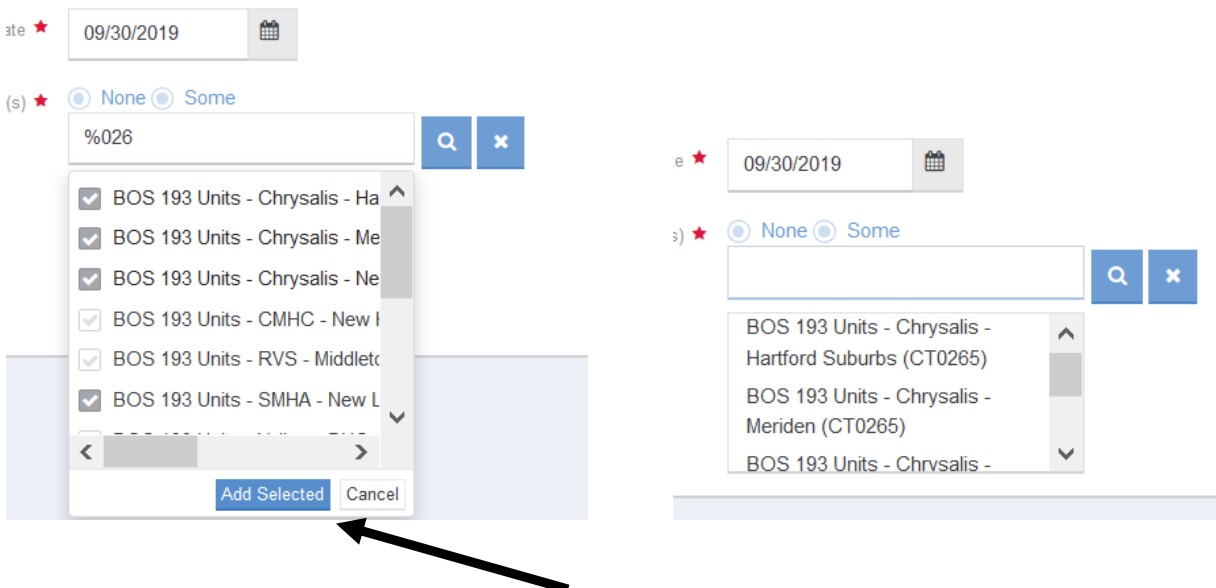
- The process for entering Organization names is exactly the same as entering the Project(s) name(s)
- For the APR Organization(s) is usually set to All
- You will have to add each **Project name** individually to the report
 - Set the Project(s) radio button to **Some**

The image shows two sections of a web form. The left section has a 'Start Date' field with a calendar icon and the date '10/01/2019'. Below it are radio buttons for 'Organization(s)' with options 'All', 'None', and 'Some'. The 'All' option is selected. The right section has an 'End Date' field with a calendar icon and the date '09/30/2020'. Below it are radio buttons for 'Project(s)' with options 'None' and 'Some'. The 'Some' option is selected. A search bar with a magnifying glass icon and a close 'x' icon is visible to the right of the Project(s) options. Black arrows point to the Start Date, End Date, and the 'All' and 'Some' radio buttons.

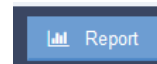
- Use a wildcard search to locate the Project name or number
 - Searching by number is more efficient
- The **wildcard symbol %** and can be used at the start, middle, or end of your text or number search
 - **%Chry** or **%Chrysalis** or **%0265**
- The screen is very small and you will have to scroll 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



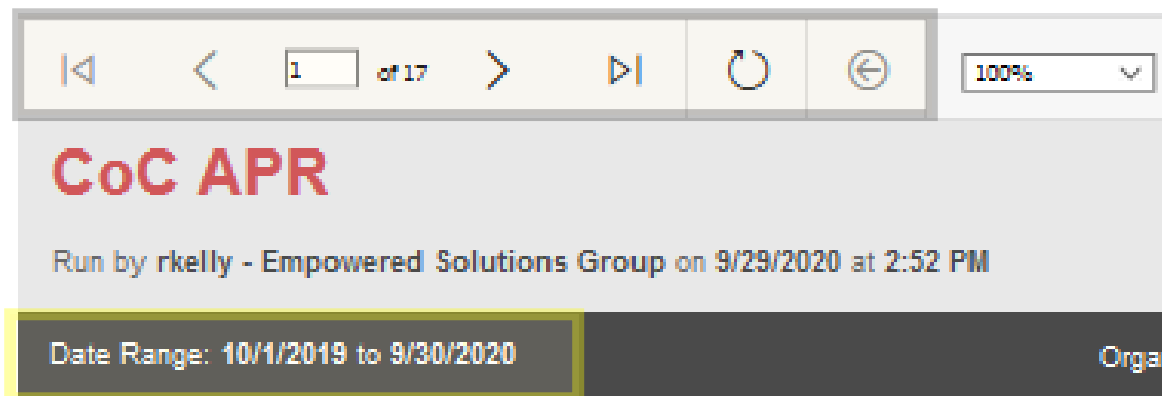
- Click on **Add Selected** to load the checked off Project names into the report
 - You can select the names all at once or a few at a time
- Review all of the Project names before you run the report
 - If you added a Project you do not need you can remove it by clicking on the name



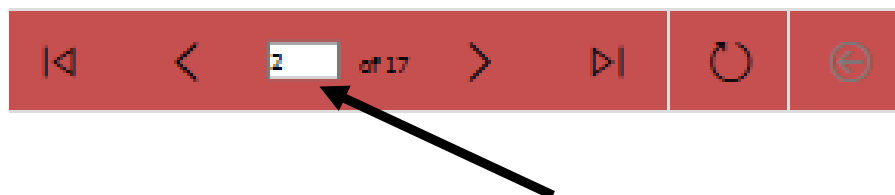
- Use the **Report** icon in the lower right corner of the screen to run the report
 - It will take a few seconds to a few minutes for the report to load depending on the size



- 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

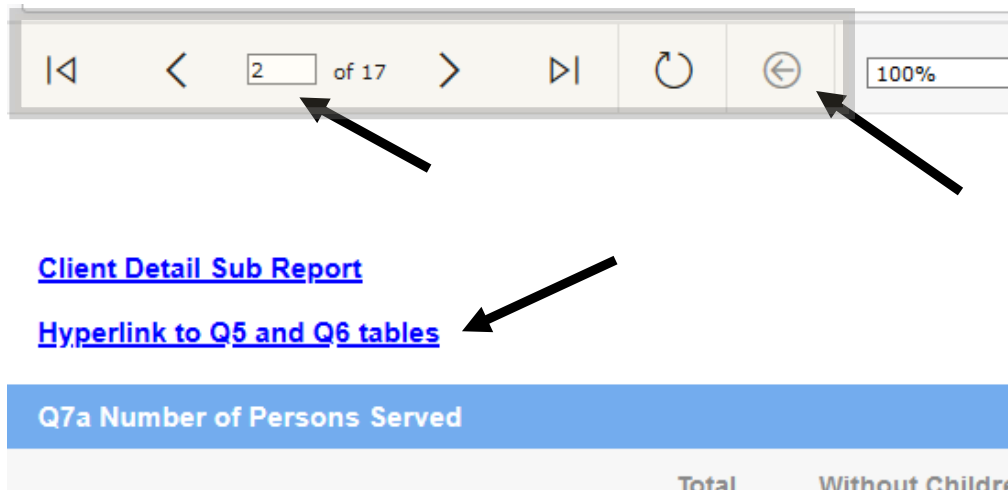


[Client Detail Sub Report](#)

[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

