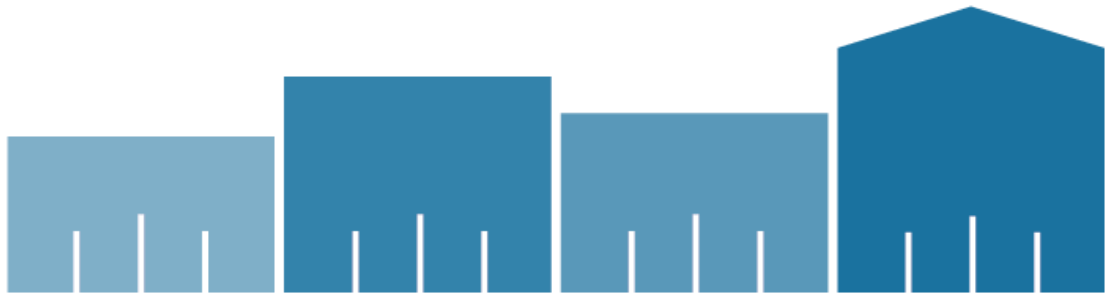


# How to Run & How to Read the APR in HMIS

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Institute for Community Alliances

## Contents

CSV APR REPORT GUIDE .....	3
PURPOSE .....	3
REPORT DESCRIPTION .....	3
HUD /HMIS REPORTS.....	3
ESG CAPER REPORT.....	3
REPORT SETTINGS .....	3
EXPORTING THE REPORT .....	4
DOWNLOADING THE REPORT .....	5
HUD RESOURCES .....	6
HOW TO READ THE ESG CAPER- FOR DATA QUALITY .....	6
Personally Identifiable Information (PII):.....	<b>Error! Bookmark not defined.</b>
Health Insurance:.....	<b>Error! Bookmark not defined.</b>
Timeliness: .....	<b>Error! Bookmark not defined.</b>
Report Validation Table: .....	<b>Error! Bookmark not defined.</b>
Income and Housing Data Quality: .....	<b>Error! Bookmark not defined.</b>
Living Situation:.....	<b>Error! Bookmark not defined.</b>
HOW TO READ THE ESG CAPER- FOR OUTCOMES .....	<b>Error! Bookmark not defined.</b>
Length of Participation:.....	<b>Error! Bookmark not defined.</b>
Exit Destination:.....	<b>Error! Bookmark not defined.</b>
RRH Length of Time between Project Start Date and Housing Move-in Date:...	<b>Error! Bookmark not defined.</b>
Homeless Prevention Assessment at Exit:.....	<b>Error! Bookmark not defined.</b>
SAGE UPLOAD .....	7
New Sage User: .....	7

## CSV APR REPORT GUIDE

### PURPOSE

This guide serves as a manual on how to run the Annual Performance Report in ClientTrack and how to interpret the report and its findings.

### REPORT DESCRIPTION

- This Compliance Report is specifically designed for HUD submission and intended for seamless integration into Sage.
- The report is configured to display only client records with data errors, including missing data and incongruent information, such as household inconsistencies, multiple heads of household, or minors incorrectly listed as heads of household.
- This comprehensive report is designed to present data quality and information for Universal Data Elements (UDEs 3.01-3.917) and Project Descriptor Elements (PSDEs 4.02-4.20) across all clients, with a specific breakout for the sub-population of Chronically Homeless individuals.

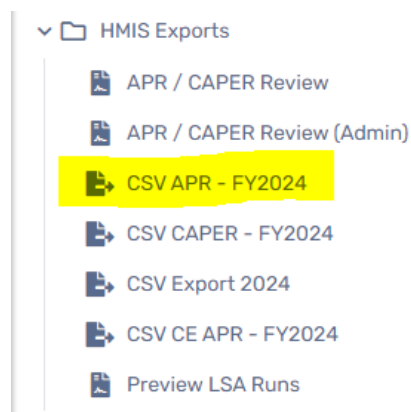
### HUD /HMIS REPORTS

To login, use the Workgroup “GA HMIS: HMIS Programs” and Organization users “HOME Organization”.

Go to “Reports” workspace



## ESG CAPER REPORT



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## REPORT SETTINGS


- 1) You can save report settings to run later. Select “Save Settings” and input a name for your saved parameters. They will appear after the report run.
- 2) Enter the Date Range or select from the “Date Range List”
- 3) The organization will auto-fill based on the organization the user is logged in as.
- 4) Filter by Grant Program if report results should reflect specific grants
- 5) Filter by grants (if applicable).
- 6) Filter by Program Type or select the program(s) to include in the report, using the scroll option.
- 7) Run Export

**Saved Report Settings**  
To use previously saved report settings, select the desired settings description. To save the current report settings, select Save Settings, type a description of the settings in the Save As field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: Save Settings  
Save As \*  
Training Org APR\_2.25.24

**Date Range**  
Indicate the time period for his report. Only records that fall within the date range you select will be included.


Date Range List: Previous Fiscal Year  
Begin Date: 10/01/2022 to 09/30/2023

**Organization**  
Indicate which organizations should be included in the report by selecting each organization separately, or click the  icon to select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the export.


Organization: ATL  
City of Atlanta CoC  
 My Training Organization  
Non-Congregate Coordinated Response  
188 Healthcare Action Plan/Healthcare & Professional Practice (HAPPP)

**Grant Program**  
Use the Grant Program and Grant Component drop down selections to narrow down the list of Grants

Grant Program: -- SELECT --  
Grant Component: -- SELECT --

**Grant(s)**  
This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the  icon to select all. Use the Grants filter to narrow down the list of projects for your report.

Grant(s):  Filter by Grant(s)

**Project**  
The list displays projects that belong to the organizations you selected above. Indicate which projects should be included in the report by selecting each project type and/or project separately or click the  icon to select all. Unchecking the HMIS Projects Only checkbox will allow the APR to be run on any project in the system. If running an APR for a non-HMIS project, please be aware that there may be missing information where information wasn't collected.

Project Type:  Filter by Project Type  
HMIS Projects Only:   
Project(s):  Filter by Project(s)

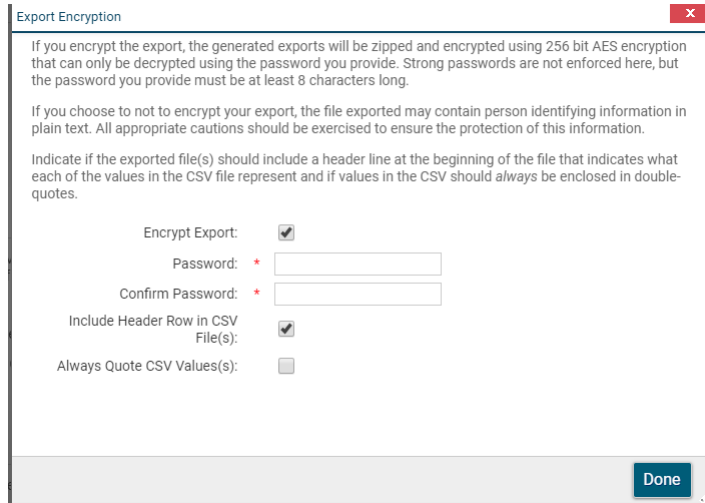
2021 Bugs-Agency B - RRH-(CoC-RRH-501)  
90 Works  
Able Housing Concierge  
Action Min. - Non Fed Services  
AT and Transition

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## EXPORTING THE REPORT

### Option 1: Encrypt Export

Choose a password that is NOT your HMIS Password (this may be exposed in the database)

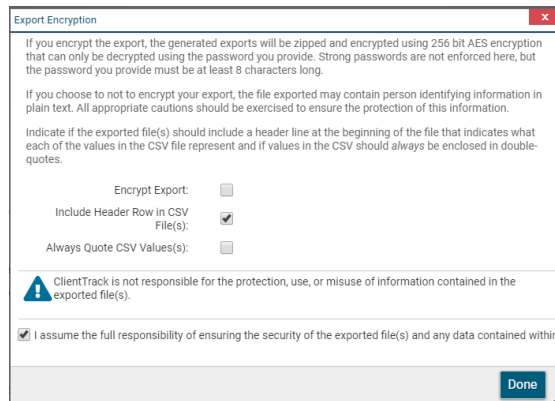


Option 2: Uncheck Encrypt Export

Mask SSN when choosing the Run Export option.

SSN Masking: XXX-XX-XXXX

Select: "I assume the full responsibility of ensuring the security of the exported file(s) and my data contained within". **This means you must make efforts to protect the data on your PC. Never email reports with PII without protecting the data.**



## DOWNLOADING THE REPORT

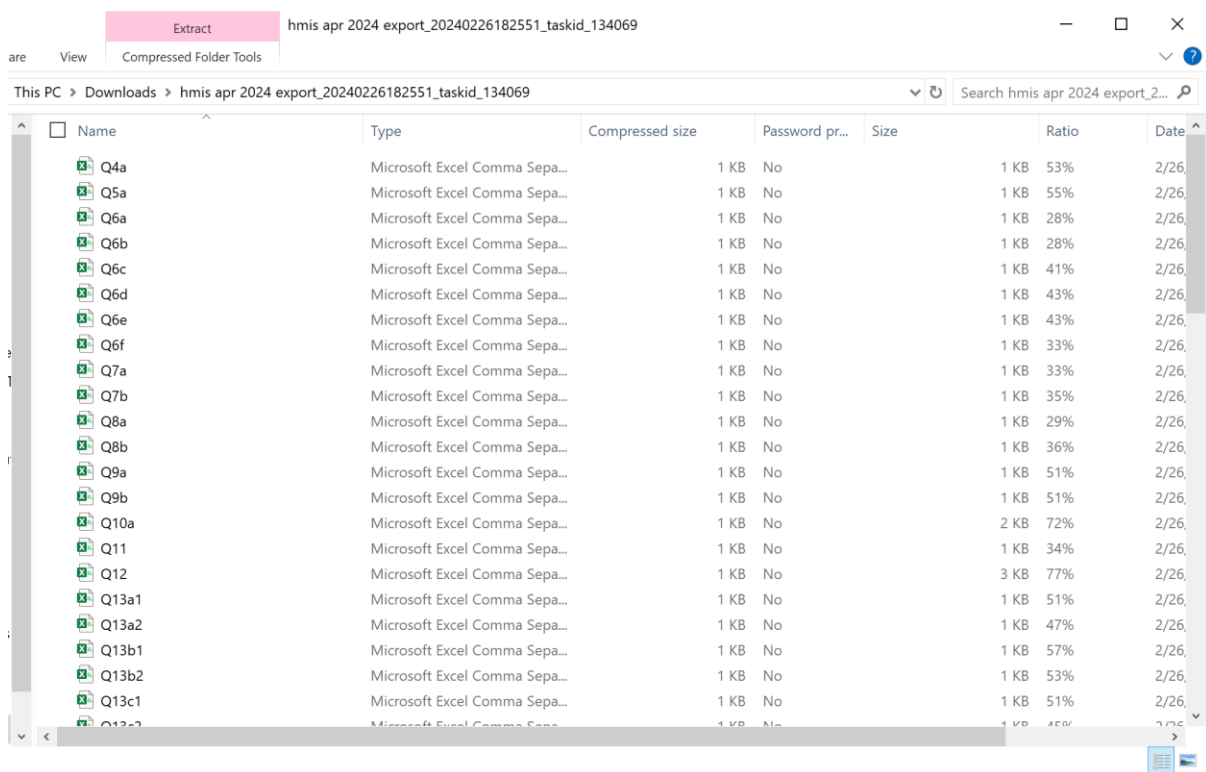
Navigate to "Files on Server"

A list of your report exports will appear. (Use click to view status if you don't see your report)

	Created	Expires	
HMIS_APR_CAPER 2024 Validation_20240226182619_TaskID_154070.zip	Alexandra Ukani 2/26/2024 6:26 PM	2/26/2025 6:26 PM	🗑
HMIS_APR 2024 Export_20240226182651_TaskID_154069.zip	Alexandra Ukani 2/26/2024 6:26 PM	2/26/2025 6:25 PM	🗑
HMIS_APR_CAPER 2024 Pre-Load 2_20240226181534_TaskID_154068.zip	Alexandra Ukani 2/26/2024 6:15 PM	2/26/2025 6:15 PM	🗑
HMIS_APR_CAPER 2024 Pre-Load_20240226180553_TaskID_154067.zip	Alexandra Ukani 2/26/2024 6:05 PM	2/26/2025 6:05 PM	🗑

Choose the report file name from the list once the report run has completed.

The report appears as a "Compressed(zipped)" file in your downloads.



There are 39 report documents included as CSV files for the HMIS ESG CAPER Report. Open (and save a copy of) the folder with the files.

Tip: Include Report Name, Project names and Report Dates to organize your files!

## HUD RESOURCES

[HUD HMIS Reporting Glossary](#)- Contains details on how error messages are calculated.

[HUD Data Quality Report Handout](#)- Contains details on how to run the HUD Data Quality Report in ClientTrack; and how to filter the HUD Data Quality Report in Excel to find and manage data quality issues.

[HMIS Programming Specifications](#)- Contains details on required data to be collected in order to remain within HUD guidelines when submitting ESG – CAPER and CoC – APR to Sage.

[APR Submission Guidance](#)- Contains FAQ's and step by step guide on how to submit ESG CAPER using Sage.

[CoC APR and ESG CAPER HMIS Programming Specifications](#) – detail the business rules required for the CoC APR and ESG CAPER.

## HOW TO READ THE APR- FOR DATA QUALITY

Agencies must review the report for data quality, and update HMIS with accurate information. Corrected data will be reflected immediately in this report.

- ❖ To see the clients related to data errors agencies will have to run their HUD Data Quality Report when running their APR
- ❖ [Full APR Table Guide](#)

## SAGE UPLOAD

Once data quality issues are corrected within ClientTrack, agencies can re-run their ESG CAPER to confirm that corrections were successful.

**New Sage User:** If you are new to Sage you will have to create an account and be authorized to use Sage before viewing or editing information. The only users to gain access are ESG recipients, subrecipients can access Sage via upload links.



The screenshot shows the Sage HMIS Reporting Repository login interface. At the top left is the Sage logo with the text 'Sage HMIS REPORTING REPOSITORY'. Below the logo is a purple login box with the heading 'Log in:'. It contains two input fields: 'User Name (email address)' and 'Password'. To the right of the password field is a 'Go' button. Below the password field is a 'Forgot my password' link. To the right of the login box is a 'New User?' section with a 'Create an account' link and a 'Test run a report' link. Below the 'Test run a report' link is the text 'Upload a CSV-APR or CSV-CAPER to generate a paper report'.

*\*Once a user is approved for a Sage account the 'User Level' is assigned\**