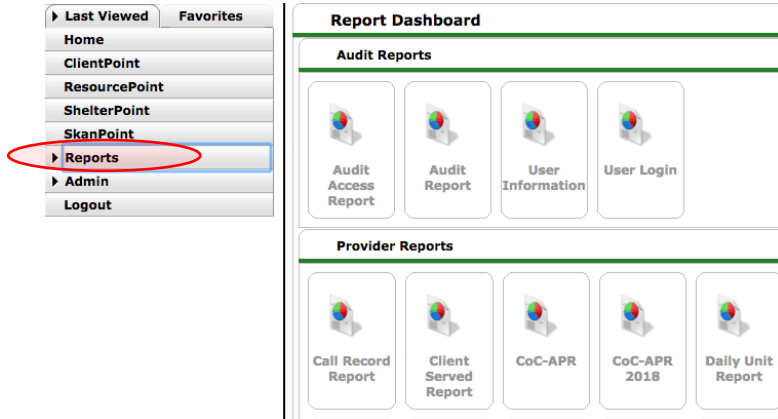


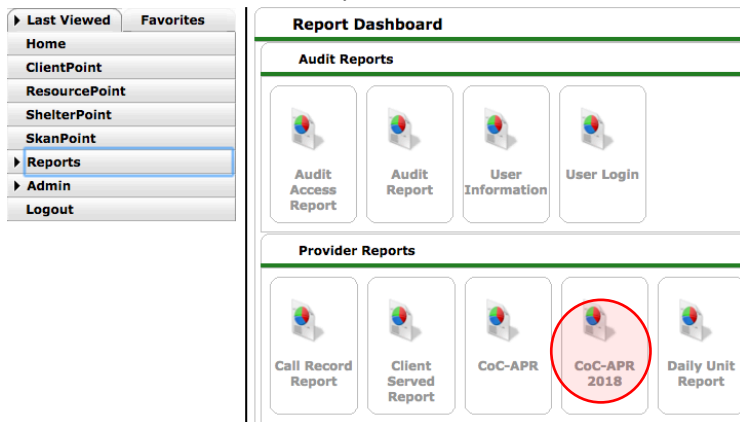
PQI 6 How to Run APR and CAPER Reports in HMIS

Step-by-Step Instructions for APR:

- Using an internet browser like Chrome, log into HMIS at: <https://kyhomeless.servicpt.com>
- In the menu on the left, click “Reports”



- Under the list of Provider Reports, click “CoC-APR-2018”



- The default is to run the report on a single project. Next to “Provider” click “Search” and select your project (you can search by project name or project ID #; see attached list of projects). Click the green + symbol to select your project.

2018

Report Options

Provider Type: Provider Reporting Group

Provider *
 Louisville Continuum of Care (1199) Search My Provider
 This provider AND its suborganizations This provider ONLY

Program Date Range * []/[]/[] to []/[]/[]

Entry/Exit Types * Basic Basic Center Program Entry/Exit HUD PATH Quick Call

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Provider	Level	Phone	Location																			
<input checked="" type="checkbox"/> Access Soup Kitchen and Men's Shelter-BOS (2660)	Level 3	Unknown	Edmonton, KY 42129																			
<input checked="" type="checkbox"/> Access Soup Kitchen and Men's Shelter-ES-BOS (2661)	Level 4	Unknown	Unknown																			
<input type="checkbox"/> The Atlanta Group-BOS (2614)	Level 3	Unknown	Somersett KY 42501																			

- [If you need to run the report on a group of projects, you can move the radio button to “Reporting Group” and then click “search” and it will show you existing groups. If you need a new group created, contact the Grant Compliance Coordinator.]

- Next to program date range, type in the first date and the last date of the period you are trying to capture. Dates need to be entered in the format of 00/00/0000. You can run the report for any date range, from as little as a couple of minutes ago to as much as multiple years. To see who is currently active in your program at the moment, you can set your start and end date to the current date (Example: If today= 12/13/2018, then Start Date = 12/13/2018, End Date = 12/13/2018).
- For Entry/Exit types, most projects should check the box next to “HUD.” For the VA funded projects (example: GPD Service-Intensive Transitional Housing Project), you should also check the box next to “VA.”

Report Options
Use Previous Parameters

Provider Type	<input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group		
Provider *	SVDP- men VA per diem-TH-LOU (1773) <div style="float: right; text-align: right;"> <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> </div>		
	<input type="radio"/> This provider AND its subordinates <input type="radio"/> This provider ONLY		
Program Date Range *	<input type="text" value="12"/> / <input type="text" value="13"/> / <input type="text" value="2018"/> ↺ ↻ ↷ to <input type="text" value="12"/> / <input type="text" value="13"/> / <input type="text" value="2018"/> ↺ ↻ ↷		
Entry/Exit Types *	<input type="checkbox"/> Basic <input type="checkbox"/> Center Program Entry/Exit <input checked="" type="checkbox"/> HUD <input type="checkbox"/> PATH <input type="checkbox"/> Quick Call <input type="checkbox"/> RHY <input type="checkbox"/> Standard <input type="checkbox"/> Transitional Living Program Entry/Exit <input checked="" type="checkbox"/> VA <input type="checkbox"/> HPRP (Retired)		

- Click “Build Report.” If you made an error in entering the parameters of the report, it will make you correct the parameters before running the report.

• *How to save the report in a format you can share—Three options:*

1. The “Download” button will become active, and if you click this, it will download a zipped file of .csv extensions, which is designed for annual upload in the Sage HMIS system by the Grant Compliance Coordinator. Double-click on the zipped file, and you will see each APR question saved according to its table number. You can open and save the tables you are interested in as tabs into a single excel workbook.

Example: If you are interested in the Demographic data, you could open the following tables and save them as tabs in a single spreadsheet: 10a (gender of adults), 10b (gender of children), 10c (gender of persons missing age information), 11 (age), 12a (race), 12b (ethnicity).

It is suggested that most HMIS do NOT use this way to save and view their data.

Generally, it is a tool used by system administrators. Typically, it is enough for HMIS users to save the report as a PDF (see option 3 below).

2. Alternatively, if you are interested in a single list from the report, you can click on the blue count that interest you, and when the small pop-up box with that list appears, you can click “download results” to get the list as an excel table.

Example: If you are interested in viewing the list of total clients served in a project, scroll down to table 5a and click the blue number in the first column, on the first row. It will show you the list of clients served, and if you click “download results,” you will receive it as an excel spreadsheet.














5a - Report Validations Table	
Report Validations Table	
1. Total Number of Persons Served	15
2. Number of Adults (age 18 or over)	15
3. Number of Children (under age 18)	0
4. Number of Persons with Unknown Age	0
5. Number of Leavers	0
6. Number of Adult Leavers	0
7. Number of Adult and Head of Household Leavers	0
8. Number of Stayers	15
9. Number of Adult Stayers	15
10. Number of Veterans	15
11. Number of Chronically Homeless Persons	1
12. Number of Youth Under Age 25	0
13. Number of Parenting Youth Under Age 25 with Children	0
14. Number of Adult Heads of Household	15
15. Number of Child and Unknown-Age Heads of Household	0
16. Heads of Households and Adult Stayers in the Project 365 Days or More	3
6a - Data Quality: Personally Identifiable Information	
	Client Doesn't Know/Client Information

- If you simply want to see a PDF of the entire report exactly like you see it on the screen, in the Chrome browser: Press Ctrl+P (or, in the top right corner of the browser, click the symbol of the three vertical dots located immediately below the X, then select "print.") On the Print screen, under Destination, click "Change" and select "Save as PDF." Click "Save" and select where you want to save the file and give it a new title.

Step-by-Step Instructions for CAPER:

- Using an internet browser like Chrome, log into HMIS at: <https://kyhomeless.servicept.com>
- In the menu on the left, click "Reports"
- Under the list of Provider Reports, click "ESG CAPER (HDS V1.3) 2018"

Provider Reports

 Call Record Report	 Client Served Report	 CoC-APR	 CoC-APR 2018	 Daily Unit Report
 Duplicate Client Report	 Entry/Exit Report	 ESG CAPER (HDS V5)	 ESG CAPER (HDS V1.3) 2018	 Needs Report
 PATH 2018	 Referrals	 Service Transaction		

- The default is to run the report on a single project. Next to "Provider" click "Search" and select your project (you can search by project name or project ID #; see attached list of projects). Click the green + symbol to select your project.

2018

Report Options

Provider Type: Provider Reporting Group

Provider *: Louisville Continuum of Care (1199)

This provider AND its subordinates This provider ONLY

Program Date Range *: / / to / /

Entry/Exit Types *: Basic Basic Center Program Entry/Exit HUD PATH Quick Call

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search:

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #:

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
+	Provider											Level	Phone								Location	
+	Access Soup Kitchen and Men's Shelter-BOS (2660)											Level 3	Unknown								Edmonton, KY 42129	
+	Access Soup Kitchen and Men's Shelter-ES-BOS (2661)											Level 4	Unknown								Unknown	
+	The Atlanta Group-BOS (2614)											Level 3	Unknown								Somerset, KY 42501	

- [If you need to run the report on a group of projects, you can move the radio button to “Reporting Group” and then click “search” and it will show you existing groups. If you need a new group created, contact the Grant Compliance Coordinator.]
- Next to program date range, type in the first date and the last date of the period you are trying to capture. Dates need to be entered in the format of 00/00/0000. You can run the report for any date range, from as little as a couple of minutes ago to as much as multiple years. To see who is currently active in your program at the moment, you can set your start and end date to the current date (Example: If today= 12/13/2018, then Start Date = 12/13/2018, End Date = 12/13/2018).
- For Entry/Exit types, check the box next to “HUD.”

2018

Report Options

Provider Type: Provider Reporting Group

Provider *: Louisville Continuum of Care (1199)

This provider AND its subordinates This provider ONLY

Program Date Range *: / / to / /

Entry/Exit Types *: Basic Basic Center Program Entry/Exit HUD PATH Quick Call RHY St

- Click “Build Report.” If you made an error in entering the parameters of the report, it will make you correct the parameters before running the report.
- *How to save the report in a format you can share—Three options:*
 1. (Generally utilized by system administrators) The “Download” button will become active, and if you click this, it will download a zipped file of .csv extensions, which is designed for annual upload in the Sage HMIS system by the Grant Compliance Coordinator. Double-click on the zipped file, and you will see each APR question saved according to its number. You can open and save the tables you are interested in as tabs into a single workbook.
 - i. Example: If you are interested in the Demographic data, you could open the following tables and save them as tabs in a single spreadsheet: 10a (gender of adults), 10b (gender of children), 10c (gender of persons missing age information), 11 (age), 12a (race), 12b (ethnicity).

2. Alternatively, if you are interested in a single list from the report, you can click on the blue count that interest you, and when the small pop-up box with that list appears, you can click “download results” to get the list as an excel spreadsheet.
 - i. Example: If you are interested in viewing the list of clients who exited to positive housing destinations, scroll down to table 23c (Exit Destinations—All Persons); click on a blue number in the column/cell you want to view. It will show you the list of clients who exited to particular positive housing destinations and if you click “download results,” you will generate a zip file that will contain an excel spreadsheet.

23c - Exit Destination - All persons					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Permanent Destinations					
Moved from one HOPWA funded project to HOPWA PH	0	0	0	0	0
Owned by client, no ongoing subsidy	0	0	0	0	0
Owned by client, with ongoing subsidy	0	0	0	0	0
Rental by client, no ongoing subsidy	1	1	0	0	0
Rental by client, with VASH subsidy	0	0	0	0	0
Rental by client with GPD TIP subsidy	0	0	0	0	0
Rental by client, other ongoing subsidy	3	3	0	0	0
Permanent Housing (other than RRH) for formerly homeless persons	0	0	0	0	0
Staying or living with family, permanent tenure	0	0	0	0	0
Staying or living with friends, permanent tenure	0	0	0	0	0
Rental by client, with RRH or equivalent subsidy	0	0	0	0	0
Subtotal	4	4	0	0	0

3. If you simply want to see a PDF of the entire report exactly like you see it on the screen, in the Chrome browser: Press Ctrl+P (or, in the top right corner of the browser, click the symbol of the three vertical dots located immediately below the X, then select “print.”) On the Print screen, under Destination, click “Change” and select “Save as PDF.”

The image shows two screenshots from a web browser. The top screenshot is a print dialog box. It displays 'Print' and 'Total: 5 sheets of paper (9 pages)'. There are 'Cancel' and 'Print' buttons. Under 'Destination', it lists 'RICOH Aficio MP C45...' and 'RICOH Aficio MP C4501...'. A 'Change...' button is circled in red. To the right, a 'Report Options' sidebar is visible with fields for 'Provider Type' (selected as 'Inquirer'), 'Provider' (selected as 'SVDP Louisville-4 LDU (887)'), 'Program Date Range' (02/13/2017), and 'Entry/Exit Types' (selected as 'Basic'). Below this is an 'ESG Report Results' section with fields for 'Organization Name', 'Organization ID', 'Project Name', and 'Project ID'. The bottom screenshot is a 'Select a destination' window. It shows 'Showing destinations for wailingmilk@gmail.com'. There is a search bar and a 'Recent Destinations' section. In the 'Recent Destinations' section, the 'Save as PDF' option is circled in red. Below it is a 'RICOH Aficio MP C4501A [00267337F0F6]' option. At the bottom, there is a 'Print Destinations Manage...' link and another 'Save as PDF' option.

Click “Save” and select where you want to save the file and give it a new title.