Quick Reference Guide for the Annual Performance Report (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

To Run an APR

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your user dashboard.
- Click on **"HMIS Reports"** found in the list of links in the upper left-hand corner of the screen. A list of reports should drop down after clicking on the "HMIS Reports" link.
- Select **"APR for CoC Grant-Funded Programs"** in the list of reports that appear in the drop down.
- Set up your report parameters by:
    - **Completing the date range** – There are a couple of options for setting the date range. You can select from the "Predefined Date Range," though this may not provide you the exact dates you need. You can fill in the dates found below this labeled "Between." The first date box is the beginning date and the second date box is the ending date – for example, 01/01/2012 and 12/31/2012. This will give me all of the clients in my program for the entire year of 2012.
    - **Choosing the "Grant Program" and "Grant Program Component"** - Select the grant your program is under in the drop down for "Grant Program." This will prompt the next selection in "Grant Program Component." If you do not know this information, feel free to try several selections to find the correct options for your program. You won't break it by choosing different options.
    - **Selecting "Grants"** – You may see several options to choose from after selecting "Grant Program" and "Grant Program Component." Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the "Grant" you want to run the APR for by clicking on the title in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple programs on the same report. Simply select multiple "Grants" by clicking on the name in the box. Again, you will see the green check mark to indicate you've selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
    - **Clicking on "Programs: Filter by Programs"** to select your program. Same set up as "Grants." To select a program click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well.
- Click on the **"Report"** button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

To Drill Down and Find Missing Data

After you have run your report and have it opened in the pop up window, you can click through it and see where you have "Missing" data. To find who is missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data – for example "Q.7 Data Quality." **Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.*
- Another window should pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to find the missing data.
- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to save the spreadsheet – save it and then open it to review the data.
- You will see the word **"MISSING"** on the spreadsheet where you are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

To Edit the Excel Spreadsheet for Emailing

It may be necessary for you to email the spreadsheet for review. It is critical that you protect client data and remove identifying information. This includes names and social security numbers. You can remove this information easily from the Excel spreadsheet with the following steps:

- Click on the column (indicated by letters at the top of the spreadsheet) or row (indicated by numbers at the left of the spreadsheet) – to select the entire column or row, click on the letter or number labeling that specific column or row
- Right click on your mouse (click the button on the right side of your mouse)
- Select "Delete" in the pop up window that appears after right clicking on your mouse
- Select the appropriate designation if another pop up window appears requesting more information. In most cases, the column or row that you were trying to delete will be deleted immediately after selecting "Delete."

If you need any assistance running your APR or finding and completing missing data, contact the HMIS Help Desk at HMISHelpDesk@ihcdaonline.com.