

How to Run the New Annual Performance Report

1. Login to ServicePoint
2. From the right-hand menu, click "Reports"
3. Find the "CoC - APR" Bubble and click on it (*Figure 1*)

FIGURE 1 — LOADING THE CoC APR REPORT IN SERVICEPOINT

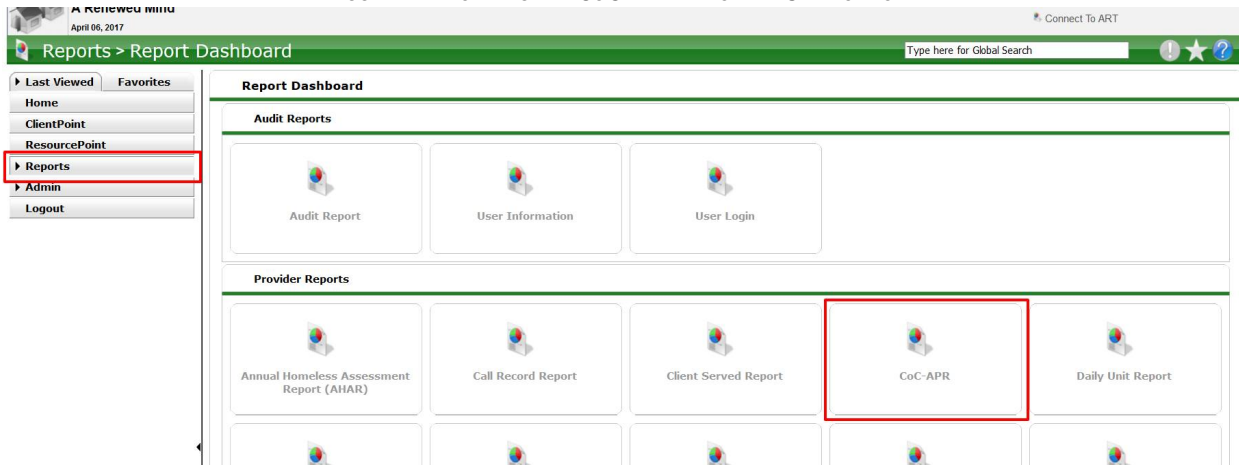


FIGURE 1 — LOADING THE CoC APR REPORT IN SERVICEPOINT

4. For an APR you'll need to know the following information:
 - Provider
 - APR Date Range (start date and **end date** (*not end date plus 1*))
 - Complete the prompts (as shown in *Figure 2*) and hit the "Build Report" Button:

FIGURE 2: PROMPTS FOR THE CoC — APR



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5. The Report Data will show up below the parameters (Figure 3).

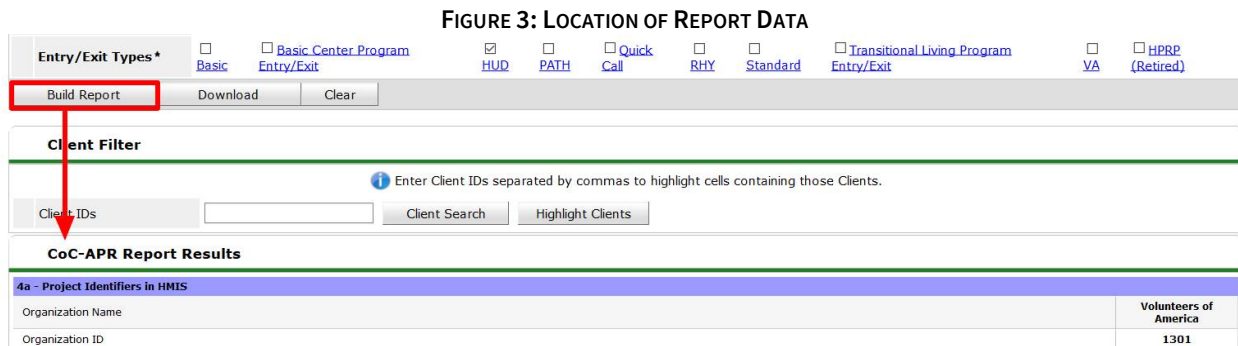


FIGURE 3: LOCATION OF REPORT DATA

6. For each set of questions, you can view the client data by identifying the question, and finding the blue link in the answer cell. The link creates a pop-out window with client id and name. You can download this data to your computer for future review (Figure 4).

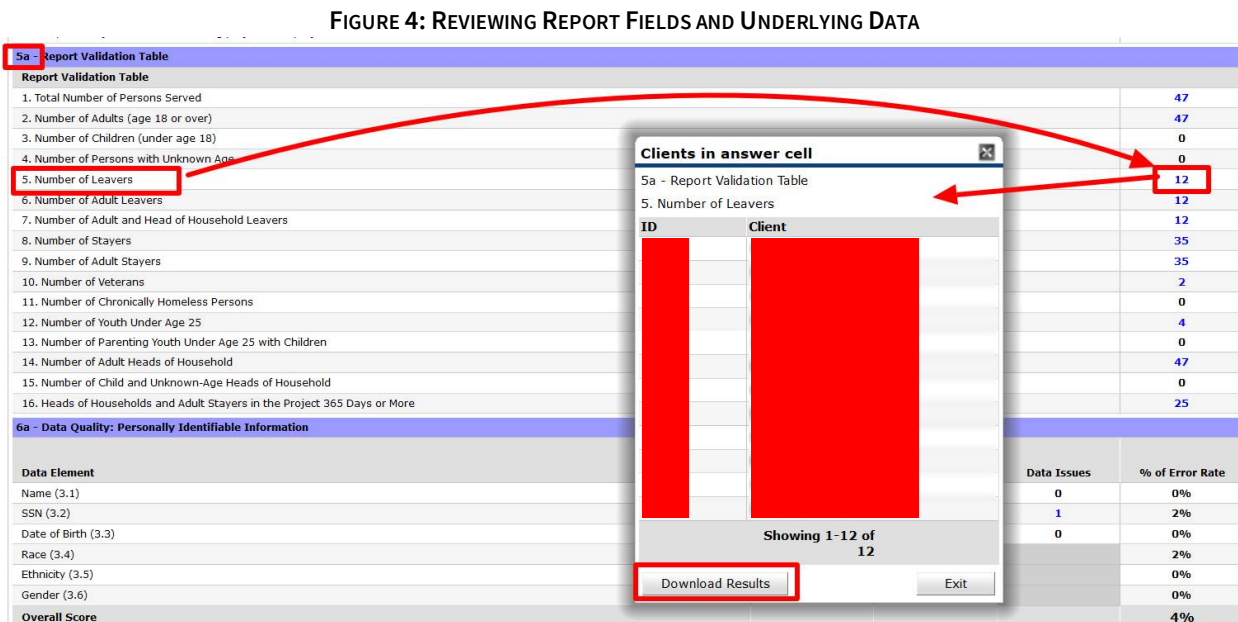


FIGURE 4: REVIEWING REPORT FIELDS AND UNDERLYING DATA

7. You should review the APR data for accuracy and make corrections. When you make corrections, you don't need to wait overnight to review the data: You view it immediately after you change it by rerunning the report (steps 1-4).

8. When the APR is ready to submit, run the Report as noted above in steps 1-4. Then, click on the "Download" button (Figure 5). This will download a zip file that will need to be uploaded to SAGE. Only a registered user can upload the file to SAGE. You should transfer the file to that person.

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FIGURE 5: DOWNLOADING THE ZIP FILE FOR SAGE UPLOAD

The screenshot shows the 'Report Options' form with the following fields and values:

- Provider Type: Provider Reporting Group
- Provider*: [PSH] VOA Chestnut Hill (1302)
 This provider AND its subordinates This provider ONLY
- Program Date Range*: 02/01/2016 to 01/31/2017
- Entry/Exit Types*: Basic Center Program Entry/Exit HUD PATH Quick Call RHY Standard Transitional Living Program Entry/Exit VA HPRP (Retired)
- Buttons: Build Report, Download (highlighted with a red box), Clear

FIGURE 5: DOWNLOADING THE ZIP FILE FOR SAGE UPLOAD

*Note: This file does not include client level data; it is safe to transmit via email.

*Note: While not recommended, if you need to run an APR for multiple projects at the same time, you will need to create a reporting group. To use a reporting group, you would choose the Parameters as in Figure 6. You must choose one provider as your “Q4a Provider”.

FIGURE 6: USING REPORTING GROUPS FOR MULTIPLE PROJECTS

The screenshot shows the 'Report Options' form with the following fields and values:

- Provider Type: Provider Reporting Group
- Reporting Group*: VOA_Combined (circled in red, with a red arrow pointing to it from the 'Search' button)
 Search Clear
- Q4a Provider*: [PSH] VOA Chestnut Hill (1302)
- Program Date Range*: 02/01/2016 to 01/31/2017
- Entry/Exit Types*: Basic Center Program Entry/Exit HUD PATH Quick Call RHY Standard Transitional Living Program Entry/Exit VA HPRP (Retired)
- Buttons: Build Report (highlighted with a red box), Download, Clear

FIGURE 6: USING REPORTING GROUPS FOR MULTIPLE PROJECTS

*Note: If you need help creating a reporting group, please contact the HMIS Administrator.