

Running an APR

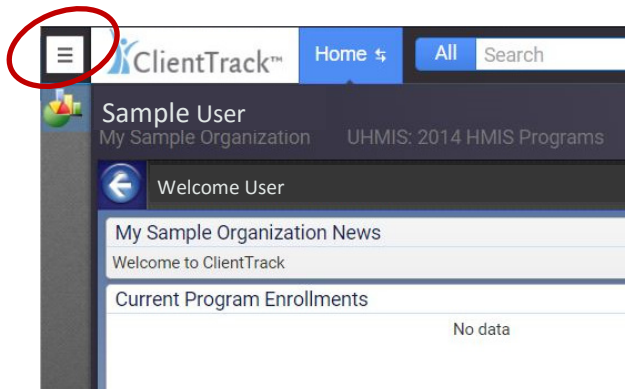
INSTRUCTIONS FOR GENERATING AN APR FROM CLIENTTRACK

The following instructions will guide you through locating and running an APR. If your report appears incorrect or incomplete please contact the HMIS team.

STEP 1: Log into ClientTrack

STEP 2: Locate the Home tab in ClientTrack and select it:

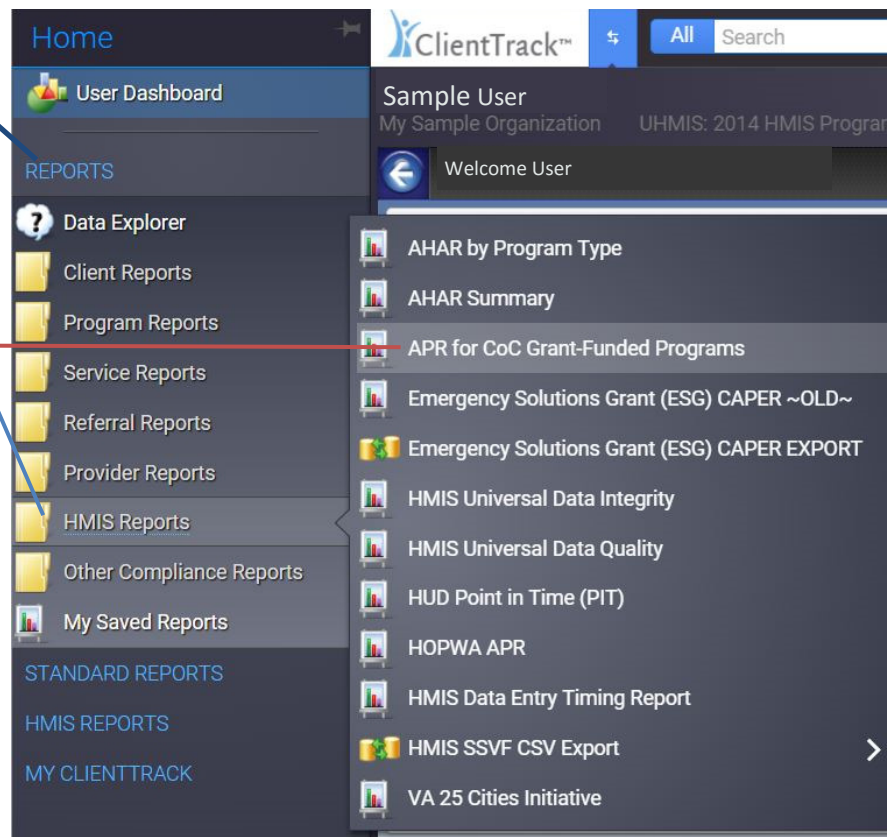
This will access the reporting features in the system, including the APR.



STEP 3: Locate and click on the reports portal in the navigation pane.

Locate the subfolder named **HMIS reports** and then click on the drop down to select **APR for CoC Grant-Funded Programs**.

Now that you have navigated and located the APR in ClientTrack, the next step is to select your parameters and run the report for analysis.



STEP 4: The APR relies on a set of parameters or report settings in order to produce results: The basic report settings that must be included are the **Date Range, Organization, Grant Program, Grant Component, Grants, Project Type, and Program**. If you do not know your report settings please contact your HMIS administrator for your unique configuration.

- ◆ **Organization:** Click on your agency name
- ◆ **Grant Program:** Select HUD CoC Grant Program
- ◆ **Component:** Select the component
- ◆ **Grant:** Select the grant that corresponds with the program component
- ◆ **Project Type:** Select the appropriate type
- ◆ **Program:** Select only one

Annual Performance Report (APR) for CoC Grant-Funded Programs

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

Saved Report Settings: -- SELECT --

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

Predefined Date Range: Current Month
 Between: 03/01/2016 and 03/31/2016

Organization(s):* Asian Association of Utah ✓
 Balance Of State CoC
 Bear River Association of Governments
 Catholic Community Services
 Catholic Community Services - N. Utah
 Cedar City Housing Authority

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

Grant(s): CABHI ✓
 CABHI SE
 CDBG - SL City ES '15-'16
 CDBG - SL City RRH '15-'16
 CDBG - SL County '15-'16
 CNH ES '14-'15

Project Type: -- SELECT --
 Program(s): Filter by Program(s)

You can be sure your report setting is selected when you see the green check mark to the left of your selection.

STEP 5: Verify your report settings for accuracy and click Report.

Program(s) - Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the ✓ icon to select all.

Project Type: -- SELECT --
 Program(s): Filter by Program(s)

Report Schedule Report Cancel