

The New APR Report Walkthrough

The new APR includes far more detailed information than has previously been reported. One of the first things you will notice is that there are new questions addressing the overall data quality for the information that has been entered. This, in my mind, really drives home the importance of the monthly data checks!

Another new aspect of the APR is the inclusion of 'sub-reports'. These reports provide more detailed information for certain questions in the APR. Unlike the old APR, where you had to select the specific question from the drop-down list, the sub-reports are directly accessible from the aggregate APR report.

I've included the formal HUD guide on the new APR. You can access it on the City of Spokane, Human Services Website at: www.spokanehumanservices.org.

Below are screenshots which will take you step-by-step through the APR process. As in all tutorial-type documents, your feedback will help make it more useful. So please don't hesitate to comment!

Thank you for your continuing dedication to data quality!

At the end of this tutorial you should know how to:

- Find the New APR report option in ClientTrack.
- Fill out the filter criteria for your grant and/or program.
- Navigate the report in ClientTrack.
- Use the sub-report feature to view detailed client level data.
- Export data from ClientTrack into Excel for review.
- Troubleshoot and correct identified data discrepancies.

Step 1 Setting up the Report

The screenshot displays the ClientTrack Enterprise web application interface. The browser address bar shows the URL: <https://asp.clienttrack.net/?Inline=false&InitialPage=1&InitialContent=https%3A//asp.clienttrack.net>. The user is logged in as David Lewis, and the workgroup is Spokane Workgroup.

The main content area is titled "Annual Performance Report (APR) for CoC Grant-Funded Programs". It includes the following configuration sections:

- Saved Report Settings:** A dropdown menu set to "-- SELECT --".
- Date Range:** A section for indicating the time period. The predefined date range is "Current Month", with a date range from 07/01/2011 to 07/31/2011.
- Organization(s):** A section for selecting organizations. The dropdown menu shows:
 - CC - House of Charity
 - CC - St. Margaret's
 - CC - Summit View
 - City of Spokane
 - Data Systems International
 - Department of Commerce
- Grant Program:** A section for selecting the grant program and component. The grant program is "Supportive Housing Program" and the component is "Transitional Housing".
- Grant(s):** A section for selecting grants. The dropdown menu shows:
 - HUD SHP St. Marg's TH WA60093
- Program(s):** A section for selecting programs. The dropdown menu shows:
 - No Program On Enrollment
 - CC--Aftercare
 - CC--Aftercare Follow-up
 - CC--SMS--SHP--Emergency Shelter
 - CC--SMS--SHP--Transitional Housing
 - CC--THOR--Operating

The left navigation menu includes sections for Reports, Users & Workgroups, Administration, My ClientTrack, and Reports. The bottom taskbar shows the Windows start button and several open applications, including Microsoft Office Word and Internet Explorer.

(Step 1 Cont.)

1. Go to the Home Tab/Reports/New HUD APR
2. Fill in the filter criteria.
 - a. **Grant Program/Component:** If you have any questions concerning what your grant component is please let me know. In most cases it will be SHP or S+C.
 - b. **SSO Programs:** There are two different Grant Program Component options for SSO-only programs. We don't have any SSO w/Outreach, so you will need to select SSO w/o Outreach from the drop-down.
 - c. **Grant(s):** What you select in the Grant field will determine what options are available in the Program field. This hasn't changed from the old APR model.
 - d. **Program(s):** The only time it is necessary to select a specific program is if you have multiple programs, funded by a single funding source, within the same agency.
 - e. **Double-check your start and end dates!**
 - f. You can save your filter criteria by selecting the Save Parameters from the drop-down box (near the top of the form).

Step 2
Data Quality Check

Q7. Data Quality

Total number of applicable records for All Clients	69
Total number of applicable records for Adults Only	27
Total number of applicable records for Unaccompanied Children	1
Total number of applicable records for Leavers	37

HMIS or Comparable Database Data Quality

Data Element	Don't Know or Refused	Missing Data
First Name	0	0
Last Name	0	0
SSN	4	2
Date of Birth	0	4
Race	0	2
Ethnicity	0	2
Gender	0	0
Veteran Status	0	1
Disabling Condition	0	1
Residence Prior to Entry	0	1
Zip of Last Permanent Address	3	1
Housing Status (at Entry)	1	0
Income (at Entry)	0	0
Income (at Exit)	0	9
Non-Cash Benefits (at Entry)	0	0
Non-Cash Benefits (at Exit)	0	9
Physical Disability (at Entry)	0	0
Developmental Disability (at Entry)	0	0
Chronic Health Condition (at Entry)	0	0
HIV / AIDS (at Entry)	0	0
Mental Health (at Entry)	0	0
Substance Abuse (at Entry)	0	0
Domestic Violence (at Entry)	0	42
Destination	0	0

Report Viewer

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St. Margaret's Spokane Workgroup
City of Spokane

[Mental Health Conditions at Entry](#)

Known Physical and Mental Health Conditions at Entry

Number of Persons in Households

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Mental Illness	9	0	9	0	0
Alcohol Abuse	2	0	2	0	0
Drug Abuse	11	0	11	0	0
Chronic Health Condition	3	0	3	0	0
HIV / AIDS and Related Diseases	0	0	0	0	0
Developmental Disability	4	0	4	0	0
Physical Disability	5	0	5	0	0

[Q18b. Physical and Mental Health Known Conditions at Entry](#)

Number of Known Conditions

Number of Persons in Households

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
None	53	0	53	0	0
1 Condition	20	0	20	0	0
2 Conditions	7	0	7	0	0
3+ Conditions	7	0	7	0	0
Condition Unknown	0	0	0	0	0
Don't Know / Refused	0	0	0	0	0
Information Missing	0	0	0	0	0
Total	87	0	87	0	0

(Step 2 Cont.)

1. Review the aggregate totals for each Universal Data Element.
 - a. If you see any totals that look to be inaccurate, select the sub-report—available sub-reports will always appear as blue underlined page headings—to see detailed client level information. The above two examples represent some of the sub-reports within the new APR. There are many sub-reports throughout the APR. The use of this feature can save a great deal of time when troubleshooting missing data.

- b. You **must** ensure that the **client level** data is correct, as well as the **aggregate totals**.

Step 3

Sub-Reports and Exporting Data

Report Viewer

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APR for CoC Grant-Funded Programs - Clients

7/6/2011 10:52:34 AM
David Lewis

ClientTrack™

Report Selection Criteria

Report Period: 1/1/2011 to 7/31/2011
 Organization(s): City of Spokane
 Grant Program: Supportive Housing Program
 Component: Supportive Services Only: W/O Outreach
 Grant(s): HUD SHP St Marg/HoC SS WA60095

Age	Race	Ethnicity	Gender	Adult / Child	Unaccompanied / Minor	Leaver / Stayer	Enroll Date	Exit Date	Veteran	Disability	Prior Residence	Prior Zip Code	Housing Status
Case:		Let's, See											
ClientID:		846	Last Name:		Let's		First Name:		See				
56	White	Non-Hispanic/Latino	Female	Adult	No	Leaver	02/08/2011	02/08/2011	No	No	Transitional housing for homeless persons (including homeless youth)	Don't Know	Stably Housed - Rent

CT2010

HUD CoC APR - Clients

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(Step 3 Cont.)

1. The above example represents the type of data that is available through a sub-report. This particular sub-report is for Question 7 on the APR.
 - a. One of the first things you will notice is that certain aggregate fields listed in the main report are missing in the sub-report. This was discussed with the report designer and a solution has been found.
 - i. Use the export to Excel function (located in the upper right-hand corner of the form) to view **all** the fields listed in Question 7.
 - ii. Make sure you use the Excel option labeled: Export Data to Excel. **Do Not Use:** Export Report to Excel.
 - b. Not including all the fields in the sub-report was a conscious decision on the part of our vendor and is not a bug.

Step 4 *Exporting Data*

	S	T	U	V
1	PriorZip	HousingStatus	Destination	DomesticViolenc
2	Don't Know	Stably Housed - Rent	Transitional Housing for homeless persons (including homeless youth)	No
3				
4				
5				
6				

1. The above example shows a sample of what you can expect to see when exporting data into Excel.
 - a. Please note the presence of the Domestic Violence field, which is missing in the normal sub-report.
 - i. The vendor is aware that children are being counted in the Domestic Violence field as missing data. The HUD 2010 Data Standards **do not** require collection of Domestic Violence data on children. As such, you **are not** expected to complete such an assessment for children.
 - b. There are many other helpful fields contained within the exported data. I highly encourage the use of this feature.
 - c. The data for the APR comes out of the entry and exit assessments attached to each client's enrollment.

Walkthrough Conclusion

This concludes the tutorial. I hope you have found this helpful. Please continue to log any issues you encounter! You can also reach me at my direct line at 509-625-6051.