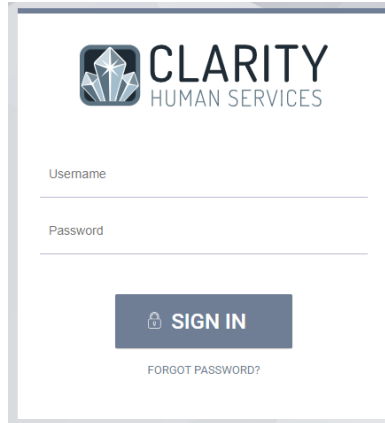


## How to Pull an Annual Performance Report (APR) in HMIS Clarity

There are many program types that are required to submit an annual performance report (APR) to HUD. This report in HMIS Clarity is designed to align with the HUD data standards, meaning that instead of manually collecting and analyzing the data, HMIS clarity has already designed a report that will pull the needed data for APR submittals.

**Note:** The HMIS [data dictionary](#) or the [APR Portal](#) can provide additional clarification and detail regarding specific data elements.

### 1. Log into HMIS Clarity.



The screenshot shows the login interface for CLARITY HUMAN SERVICES. It features a logo at the top left, followed by input fields for 'Username' and 'Password'. Below these fields is a prominent 'SIGN IN' button with a lock icon, and a smaller link for 'FORGOT PASSWORD?'.

### 2. Navigate to the Reports Section:

- Select the launch pad and then click the "Reports" icon.





### 3. Select HUDX-227 Annual Performance Report (APR)

- Navigate to “HUD Reports” locate the “Annual Performance Report” and select “Run.”

HUD Reports	8 report(s) ^
[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]	★   <input checked="" type="radio"/> RUN   <input type="radio"/> SCHEDULE   MORE INFO v
[HUDX-224] PATH Annual Report [FY 2024]	★   <input checked="" type="radio"/> RUN   <input type="radio"/> SCHEDULE   MORE INFO v
[HUDX-225] HMIS Data Quality Report [FY 2024]	★   <input checked="" type="radio"/> RUN   <input type="radio"/> SCHEDULE   MORE INFO v
[HUDX-227] Annual Performance Report [FY 2024]	<input checked="" type="radio"/> RUN   <input type="radio"/> SCHEDULE   MORE INFO v

This selection will bring you to the preview page where you will be able to select the parameters for the data quality report.

### 4. Set Up Your Report Parameters:

- a. **SWITCH ACCESS AGENCY(IES)**: Start by selecting your agency.

#### REPORT LIBRARY

HUD Reports > [HUDX-225] HMIS Data Quality Report [FY 2024]

Switch Access Agency(-ies)

Choose...
All
System
<b>Test Agency</b>

- b. **CO C FILTER CATEGORY**: Next select the CoC Filter. Generally, the “Agency CoC” selection will be appropriate; however, you can select the other categories if appropriate for the report you would like to run.

**Tip:** BitFocus provides additional clarification on CoC Filter categories; you can refer to it [here](#).



<b>CoC Filter Category</b>	<p>There are four levels of CoC filtering available. Only one option may be selected for each report:</p> <ul style="list-style-type: none"><li>• <b>Agency CoC:</b> The report will only pull from Agencies with the selected CoC</li><li>• <b>Program CoC:</b> The report will only pull from Programs/Projects with the selected CoC</li><li>• <b>Site CoC:</b> The report will only pull from Sites with the selected CoC</li><li>• <b>Inventory CoC:</b> The report will only pull from Bed Inventories with the selected CoC. Note: Choosing this option will limit to only those projects with Bed Inventories.</li></ul>
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- c. **COC:** Under this category select "CA-608 Riverside City and County CoC"
- d. **PROJECT TYPE(S):** Next, select the project type of the program(s) for which you would like to run the report.  
You can select "All" to run the report for all program types, you can select a single project type, or you can select multiple project types by holding down the Control/Command button on your keyboard.
- e. **PROGRAM STATUS:** Select whether your program is active, inactive, or both.
- f. **PROGRAM(S):** Select the program(s) you would like included in your report.
  - i. **Tip:** Hold down the Control/Command button to select multiple types.



**B**  
CoC Filter Category Agency CoC

**C**  
CoC CA-608 - Riverside City and County CoC

**D**  
Project Type(s)  
Choose...  
All  
Emergency Shelter – Entry Exit  
Emergency Shelter – Night-by-Night  
Transitional Housing

**E**  
Program Status All Programs

**F**  
Program(s)  
HHOPE Permanent Housing  
Test Agency 1 Program 1 SO  
Test Agency 1 Program 2  
VA SSVF PH  
VA SSVF PH 2020 Standard

### 5. ADDITIONAL SETTINGS:

- a. **APPLY ENROLLMENT COC FILTER:** Typically, this field will be left at its default selection of “No”.
- b. **FUNDING CRITERIA:** Select “Not Based on Funding Source”

**G**  
Apply Enrollment CoC Filter No

#### LEGACY FEATURE: SERVICE BASED FUNDING SOURCE

**H**  
Funding Criteria Not Based on Funding Source

- c. **CLIENT ID SELECTION:** This field can be kept at the “Clarity Unique Identifier” default option to prevent data loss. However, the HUD Unduplicated Personal ID” may be useful in some circumstances. More information can be found [here](#).



Client ID Selection ⓘ

Clarity Unique Identifier



d. **REPORT DATE RANGE:** Select the date range for your report.

Report Date Range

\_\_/\_\_/\_\_  - \_\_/\_\_/\_\_ 

## 6. REPORT OUTPUT FORMAT:

- Report Output Format:** Select the format you prefer (e.g., PDF, Excel)
- Drilldown Output Format:** If you select “Web Page,” the report will have certain elements that are embedded with links that you can click that will take you directly to additional pages that display more information regarding that data quality element. These are “Drilldown Outputs” and you can also select the format which you would like the drilldown output to generate.

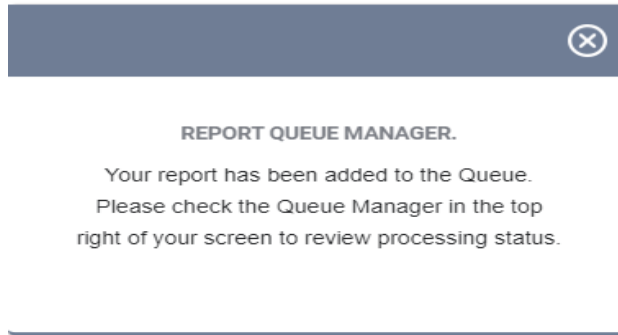
If you select any other *Report Output Format*, the *Drilldown Output Format* field will not be present.

**K** Report Output Format  Web Page  PDF  Excel  CSV-Details  CSV-Upload

**L** Drilldown Output Format  Web Page  CSV

## 7. RUN THE REPORT:

- Once you are finished selecting the parameters, select “Submit” and the Report Queue Manager will pop up informing you that the reporting request is processing.



REPORT QUEUE MANAGER.

Your report has been added to the Queue.  
Please check the Queue Manager in the top right of your screen to review processing status.

### 8. ACCESS YOUR REPORT:

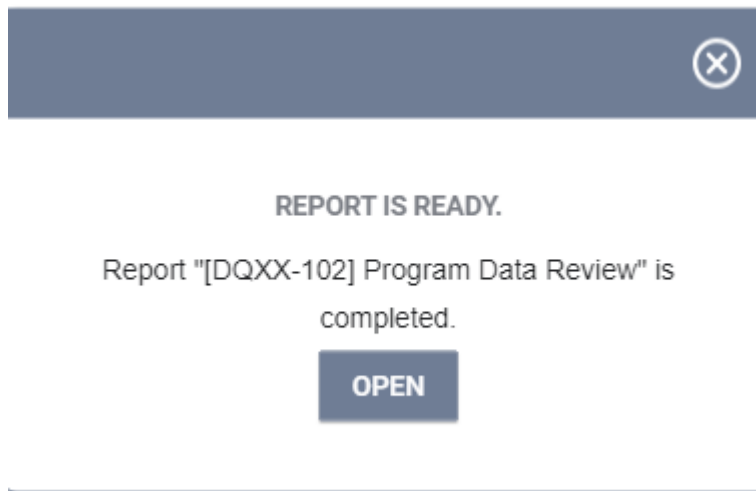
- The processing status of the report will display in the Report Queue in the upper righthand corner of the screen. A small red notification bubble will display on the Report Queue with a number reflecting how many reports have been generated.



COMPLETED

[DQXX-102] Program Data Review **Processed** OPEN

- A new notification will pop up once the report is ready to view. You can select "Open" on the pop up,

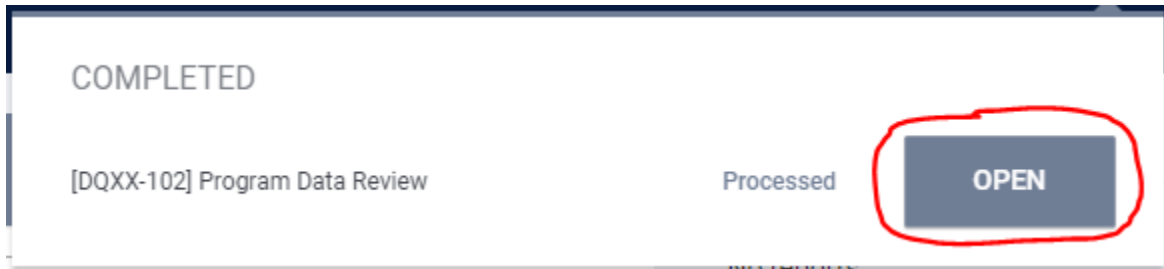


REPORT IS READY.

Report "[DQXX-102] Program Data Review" is completed.

OPEN

or you can navigate to the Report Queue icon in the top righthand corner and select "Open."



#### Common Issues and Troubleshooting:

- **Incomplete Data:** Ensure that all required parameters are correctly set. Double-check the date range and program selections.
- **Report Doesn't Generate:** Refresh the page and try again. If the issue persists, contact [HMISsupport@rivco.org](mailto:HMISsupport@rivco.org).

#### Tips and Best Practices:

- **Double-Check Parameters:** Always verify your project types, date range, and other parameters before running the report.
- **Save and Document:** After generating the report, save it in your preferred format and document the report parameters for future reference.