



MAY 1, 2015

HUD COC APR

REPORT INSTRUCTIONS

MINNESOTA'S HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)

WILDER RESEARCH

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OVERVIEW:

The APR is in ART only. This means that if you make changes to client data in ServicePoint, you must wait until ART refreshes to see that data in your APR.

HUD revised the APR effective October 1, 2013, changing only the report tables for income and non-cash benefits. As a result of this change, you will need to create an interim review each year for all clients who have been in your HUD program for over a year. See the [data entry instructions](#) for more information about that process.

As of October 1, 2014, new Federal data standards were implemented. These impact programs with clients in or entering on or after 10/1/2014. There have been changes to required fields as well as changes in how sub-assessment information is entered for disabilities, income, and non-cash benefits. **Clients in programs before 10/1/14 that are still enrolled will need to have their assessment information updated to meet the new standards. NOTE: New questions should be answered as of the client's start date. Children who had income recorded on their own records. Delete these and move them to the adult or head of household's record. The APR no longer reports children's income separately.**

After running the reports, you will submit your data to HUD in e-snaps:

<http://www.hudhre.info/esnaps/index.cfm?do=viewEsnapsIssuances>

APR KEY POINTS ABOUT DATA STANDARDS:

- Disability status is only required for Adults. Disability type is required for all clients (if they have a disability). You must use the new HUD Verification icon to enter disability information.
- Income data is only required to be recorded on Adult and head of household records. If a minor child is receiving SSI, SSDI, Survivor's benefits, or Tribal income, those should be recorded on the adult or head of household record.
- Insurance, disability, income, and non-cash benefit income is recorded at program entry, at exit, and updated within 30 days of the client's anniversary date.
- Housing status no longer required for any clients
- An annual Interim Review is required for **all** clients (including children) who have been in the program for a year or more as of the last day of the report period. Interim reviews must be dated within 30 days of the client's anniversary date.
- Services are no longer required or included on the APR

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RUNNING THE APR:

The report is located in ART. To access and run the APR:

1. Click on “ART” in the top right-hand corner of the screen to get to ART. Alternatively, you can click on the Reports module on the left-hand side of the screen and then click on the ART icon.
2. Click on the triangle to the left of “Public Folder.”
3. Click on the triangle to the left of “HUD CoC APR.”
4. Click on the magnifying glass to the left of “0625 - HUD CoC APR”
5. A pop-up box will appear. Click on “View Report” or Schedule report. (more instructions on scheduling reports here: <http://www.hmismn.org/postings/pdfs/scheduling-art-reports.pdf>)
6. A prompt box will appear. You will need to click on each prompt to complete it. Complete the prompts as follows:
 - a. Select Provider Group(s): Skip. Leave set at “**None Selected**”
 - b. Select Providers: **Select your provider(s)** and use the arrow to move them into the “1. Select Provider Group(s)” box. If there are already providers selected, also use the Arrows to send them back to the provider list.
 - c. Enter Start Date: **Start date of your reporting period** (ex. 07/01/2014)
 - d. Enter End date PLUS 1 Day: **One day after the end of your report period** (ex. Report period ends 6/30/2015 use 07/01/2015)
 - e. Select Provider Group(s): Skip. Leave set at “**None Selected**” (CoC/LSA users may use this)
 - f. Select Entry Type: Use **HUD**
 - g. EDA Provider: Skip. Leave set at “**Default Provider.**”
 - h. Enter Adult Age: **18**
 - i. EDA Provider: Skip. Leave set at “**Default Provider.**” Unless you have a Case Manager 2 “Servicepoint license. Then select the provider for which you want to run the APR.
 - j. Enter Effective Date: **One day after the end of your report period (same as End date).**
 - k. *Is using the Disability Determination field part of your workflow for HUD reporting? Select “**Yes**”
 - l. *Is using the “Receiving Income Source field part of your workflow for HUD reporting? Select “**Yes**”
 - m. *Is using the Receiving Benefit field part of your workflow for HUD reporting? Select “**Yes**”
 - n. Is using the Interim Reviews part of your workflow for HUD reporting? Select “**Yes**”
7. Select the “Run Query” button—or the “Enter” button on your keyboard. **Note:** do not hit “Enter” until all prompts are completed. Hitting Enter tells the system to run the report.
8. You’ll first see a pop-up box that says, “Retrieving Data”. After all the data has been retrieved, the report will open.
9. Save the report to your computer by going to “Document” in the top left-hand corner of the report. Click “Save to my computer as” (NOT “Save report to my computer as”) and select PDF for the HUD CoC APR (counting report).

Report Details:

Key things to know about the APR report and the main categories:

- The HMIS report doesn't include all questions in the APR since some of the information comes from other sources. The HMIS report starts at #7 and also skips a few questions. You will need to contact HUD directly if you have questions about items not included in the HMIS section. Only the ServicePoint question options with (HUD) after it are included in the counts. Depending on the question, a response without (HUD) after it may show up as missing or be excluded. In the near future for income and benefits, non-HUD benefits will be counted as "Other."
- Make sure to read all of the text on the APR to understand who is included in each question.
- When clients turn 18 while in the program, you will need to go back and complete all questions required of clients 18+. Backdate to the program entry date when completing these questions and complete the data based on the client's situation at entry. The best practice is to collect all information required for clients 18+ for anyone 16-17, especially in longer-term programs.

FAQS AND INFORMATION FOR INTERPRETING YOUR APR

Q. WHICH PROGRAM ENTRY IS USED? A. THE LAST/MOST RECENT PROGRAM ENTRY

If clients have more than one program entry in your APR period, only data from the last one is pulled into the reports. It is still important to collect complete information each time a client enters your program.

AGE

Age is one of the most important data elements. It is used in many ways in the report to divide up sections of the report into more detail. It is very important to collect an accurate birthdate from clients. If a client refuses or one isn't known, you will need to provide an estimate. Use January 1st of a year in these cases and select "approximate or partial date of birth" in the Date of Birth Type field. In rare cases, you can use the refused or don't know options.

Age definition: Age is based on the most recent program entry in the report period OR the first day of the reporting period (whichever is last). If the client enters after the report period start date, it is based on their last program entry date. If they enter before the report period, it is based on the first day of the report period. It is not based only on age at program entry.

Example: your APR period is 7/1/10 to 6/30/11. A client was in your program from 2/15/2010 to 7/21/2010, returning 3/30/2011. 2011 APR: age= client's age on 3/30/11. 2012 APR: age= the client's age on 7/1/2011.

LEAVERS AND STAYERS

Clients are divided into two categories: leavers and stayers. This is the basis for how exit information is included in the report. Clients are grouped into two categories instead of just focusing on exits.

Leavers: clients who have exited the program and aren't currently being served on the last day of the report period.

Stayers: clients in the program on the last day of the report period. If clients have left, returned, and haven't exited again during the report period, they are classified as stayers.

HOUSEHOLD CATEGORIES

Each client is grouped into one of four household types throughout the report. The groups are based on household information and the ages of household members. In most questions in the report, each person is counted based on their household status at last program entry.

- Without Children: singles, couples with no children, pregnant females alone, and other adult only households
- With Children and Adults: one-or-two-parent households with parents over 18 and at least one child under 18.
- With Only Children: clients under 18 served on their own. Can be parents, siblings, single youth, etc. Note: make sure that these numbers are correct, especially if you don't serve many clients in this category. Higher counts than expected could indicate children with an entry/exit not connected to other household members.
- Unknown Household Type: if the birth date is missing clients can end up in this category.

SUMMARY OF APR QUESTIONS

#7: Overall counts and Data Quality

This section begins with 4 counts:

- All clients
- Adults only
- Unaccompanied youth (counts only clients under 18 served by themselves (with no other household members)). It is not the same as the "with only children" household category
- Leavers

Data quality counts cover the majority of questions used in the APR plus a couple in the data standards used in other types of HUD reporting. Don't know/refused and missing data is highlighted for required data elements for all clients. Don't know/refused is ok only if the client answers this way, and lower counts are best.

- Veteran status is required for clients 18+ either at entry or who turn 18 while in the program
- Zip code of last permanent residence and Housing Status are included in this section but are no longer required. These will likely be removed in the next version of the APR.
- If you identify disabilities that were present at program entry but not revealed by the client, make sure to record that in ServicePoint: Go to the entry/exit section and click on the pencil next to the entry date to update. Click on the colored bar to delete any answers that are incorrect.
- Disability types show up as missing/unknown in two situations:
 - Missing: neither the "Disability of long-duration" or disability sub-assessment is completed.

- Unknown: client has “yes” recorded in “Disability of long-duration” but the disability sub-assessment is empty. In this case, to correct it you would want to make sure you enter the disability type in the sub-assessment.

#8 persons served during the operating year

Household type uses the four new categories provided above and counts each person individually based on their household type at last/most recent program entry.

Point-in-time counts focus on the last Wednesday of four different months. The counts start with January on the report, but you will need to think about how the months fall in your program year. The point-in-time counts may not include all clients served by your program depending on when they enter and exit your program. *Example:* for a program reporting from 7/1/10 to 6/30/11, January (2011), April (2011), July (2010), October (2010) would be included in the point-in-time counts.

#9 Households served

This is the one place on the report that is focused on counting by household rather than individual (as in the case in #8 and all other sections of the report). It is based on a “master household.” The report looks at all program entries and household situations to try and unduplicate the households. If clients enter the program only once in one household configuration, their household type is pretty simple to understand. If clients enter more than once during a reporting period and have different household situations each time, only one household type will be assigned. Example (from HUD):

- Program stay 1) Linda (missing DOB) and Tom (adult) enter a program together. Tom leaves. Annie (a child) joins Linda
- Program stay 2) later in the operating year Tom and Linda return to the program
- Program Stay 3) Later in the operating year, Tom returns to the program alone
- Total household =1, Household with Children and Adults
- If Tom and Linda were assigned to Household ID 100 at the time they entered the program, Annie is also assigned to Household ID 100 when she joins Linda
- As we move through a list of program stays in chronological order and arrive at Tom and Linda’s second program stay, we consider them to be part of Household 100 because Tom is an adult who was served previously in the operating year. The same rule applies to Tom’s third stay. In effect, all three program stays have a *MasterHousehold* ID of 100

12 a & 12b: Outreach programs only

If you are an outreach program you will need to use 12 a and b to record the details of your outreach activities back to HUD. This section corresponds to additional questions for outreach programs in the HUD assessment within ServicePoint.

If you are not an outreach program, you will still see these questions when you run the APR. Please ignore them. You will not have a space to report them in e-snaps.

15-17: Demographics

The APR handles a number of basic demographic questions similarly, breaking them out by household type and also between children and adults. Make sure to check and make sure the counts within categories seem correct and that any missing values are updated.

Age: based on the most recent program stay during the report period or the report period start date, whichever comes last. This section is the best place to make sure clients are showing up in the appropriate age range since it affects many other questions in the report.

Disabilities (questions 18 and 22)

Reported for all clients, including children at entry and exit. The “disability of long duration” question is only required for adults. The disability sub-assessment is required for all clients. Both are part of how data is counted in the disabilities section. If you are unsure of the HUD disability categories, please read through the definitions on the HMIS data entry forms.

- *Disability of long-duration:* make sure all adult clients (no matter the program entry date) have an answer to this question. When making updates, if a client has a “no” answer, confirm this is still correct. If it is now “yes,” figure out if the disability was current as of the program entry date. If it was current at the entry date, back date to the program entry date and re-answer the question. Once you return to live mode, click on the colored bar next to the question to delete the “no” response. If the disability started after the entry date, backdate to the ACTUAL day the disability started and re-answer the question. In this case you should NOT delete the “no” response recorded at entry. Instead, change it to “Yes” on the date the disability started.
- *Disabilities sub-assessment:* within the sub-assessment there is a question called “disability determination.” This must be set to “yes” for a disability type to appear on the APR.

A disability type of “Other” will not be counted as a Disability Type on the APR, but you will have a record of your client’s disability. If you know a client has a disability, but you don’t have documentation it should still be recorded in the sub-assessment. In the case where no documentation is yet available, record the disability type. Documentation should be set to “no” within the sub-assessment.

#20: Residence prior to entry

Only reported for adults and youth (under 18) on their own. It only refers to the residence prior to their most recent program entry.

Income and non-cash benefits (Q23-24)

Income is reported for all adults. Total income amounts are only reported for adults. If a household is receiving income on behalf of a child, such as SSDI or Survivor's benefits, make sure it is recorded in an adult's record. NOT in the child's record. Income on a child's record will not be counted in the APR.

First, the report looks at "total income." If nothing is reported in total income, then the report will sum all HUD cash income sources without end dates in the report period. **Make sure to update the "total monthly income field" whenever income is updated in the sub-assessment.** If you answered "yes" to "Income Source" but did not include information in the income sub-assessment, the client will be reported as missing income.

NOTE on Interim Reviews: Annually, for all clients who have been in the program for a year or more, be sure to complete an Interim Review. Click on the Interim Review icon in the entry/exit tab, select Annual Assessment, and update income and non-cash benefit records that changed before the end of the report period. Make sure the income/non-cash benefits questions along with total income are answered correctly for all clients that have been in the program for a year or more. Make sure that the date of the Interim Review is within 30 days of the anniversary of the client's program entry date. If the client has no changes in income or non-cash benefits, open the interim review and just click "Save". This will indicate no changes occurred, but the record has been reviewed.

Q36: Performance Measures by Program Type

There are a number of different sections within question 36 related to different HUD program types. The program category your data shows up in is based on the setting for the provider(s) you selected when you ran the reports. Wilder sets these fields based on information we have collected from your agency when we set up your program. If you think the data is showing up in the wrong category (PSH, RRH, TH, SO, or SSO), please contact Wilder so we can confirm the correct category for your program.

The first two columns of the report will be blank. These correspond to the number and percent your agency indicated to HUD as targets during the Exhibit 2 process. The data isn't pulled from HMIS. You will also need to calculate the difference between the data pulled from HMIS and your estimates for the last column on the report which is also blank: % Difference between Exhibit 2 Target and Actual Performance.

36A PERMANENT SUPPORTIVE HOUSING PROGRAMS

Performance Measure	Description	Clients for whom this measure is appropriate
1. Housing Stability Measure	The # and % of persons who remained in the permanent housing program as of the end of the operating year or exited to permanent housing (subsidized or unsubsidized).	All clients
2a. Total income measure	The % and # of persons age 18 and older who maintained (if more than zero \$) or increased their total income (from all sources) as of the end of the operating year or program exit.	All Clients 18+
2b. Earned income measure	The % and # of persons age 18 through 61 who maintained (if more than zero \$) or increased their earned income as of the end of the operating year or program exit.	All Clients 18 to 61

36B. TRANSITIONAL HOUSING PROGRAMS

Performance Measure	Description	Clients for whom this measure is appropriate
1. Housing Stability Measure	The # and % of persons who exited to permanent housing (subsidized or unsubsidized) during the operating year.	All clients who are classified as leavers
2. Total income measure	The # and % of persons age 18 and older who increased their total income (from all sources) as of the end of the operating year or program exit.	All clients 18+
2b. Earned income measure	The # and % of persons age 18 through 61 who increased their earned income as of the end of the operating year or program exit.	All clients 18 to 61

36C STREET OUTREACH PROGRAMS

This question only looks at clients classified as leavers. It is also important to complete the disability sub-assessment both at entry and exit and answer all the questions within the sub-assessment for information to pull correctly in the report.

Performance Measure	Description	Clients for whom this measure is appropriate*
1. Housing Stability Measure	The % of persons placed into housing (ES, TH, SH, or PSH) as a result of the street outreach program during the operating year.	All clients who are classified as leavers
2a: Physical Disability service linkage	Among persons who entered with an unmet service need associated with a <i>physical disability</i> , the % of these persons who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.
2b: Developmental Disability service linkage	Among persons who entered with an unmet service need associated with a <i>developmental disability</i> , the % of these persons who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.
2c: Chronic Health service linkage	Among persons who entered with an unmet service need associated with a <i>chronic health condition</i> , the % of these adults who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.
2d: HIV/AIDS service linkage	Among persons who entered with an unmet service need associated with <i>HIV/AIDS</i> , the % of these adults who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.
2e: Mental Health service linkage	Among persons who entered with an unmet service need associated with a <i>mental health condition</i> , the % of these persons who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.
2f: Substance abuse service linkage	Among persons who entered with an unmet service need associated with a <i>substance abuse</i> , the % of these persons who received services for that condition by the time they exited.	Based on questions in the disability sub-assessment and records at entry and exit.

Question 36c only counts clients that have a specific HUD disability recorded in the sub-assessment with the “Disability determination” question (also in the sub-assessment) answered “Yes” or null. If any other value is selected for the “Disability determination” the sub-assessment information is excluded. The report pulls the disability into the appropriate category based on the type recorded in the sub-assessment.

*Actual # of persons in the program for whom the measure is appropriate is calculated by looking at entry, if the “(If yes) Currently receiving services or treatment?” question is “No” or left blank.

*Actual # of persons who accomplished this measure counts all clients where the “(If yes) Currently receiving services or treatment?” question was answered “No” or was left blank as of entry and there is another record of the same disability category with the “(If yes) Currently receiving services or treatment?” question answered “Yes” as of exit.

Q 36D: SUPPORTIVE SERVICES ONLY PROGRAMS (WITH A HOUSING GOAL)

Performance Measure	Description	Clients included
1. Housing Stability Measure	The # and % of persons who exited to permanent housing (subsidized or unsubsidized) during the operating year.	All clients who are classified as leavers
2. Total income measure	The # and % of persons age 18 and older who maintained (if more than zero \$) or increased their total income (from all sources) as of the end of the operating year or program exit.	All clients 18+
2b. Earned income measure	The % of persons age 18 through 61 who maintained (if more than zero \$) or increased their earned income as of the end of the operating year or program exit.	All clients 18 to 61

Q36E: SAFE HAVENS

There are also very few Safe Haven programs in Minnesota. If you see information showing up in this section and you aren’t sure if you are a Safe Haven, please contact Wilder.

Performance Measure	Description	Clients included
1a – Housing Stability	The # and % of persons who remained in Safe Havens housing as of the end of the operating year or exited to permanent housing (subsidized or unsubsidized).	All clients
1b – Increase Total Income	The # and % of persons age 18 or older who maintained (if more than zero \$) or increased their total income (from all sources) as of the end of the operating year or program exit.	All clients 18+

DATA CHECKING USING THE APR:

You will run a separate report to get detailed client level data for your APR. This report is also located in ART. To access and run the APR data check:

1. Click on “ART” in the top right-hand corner of the screen to get to ART. Alternatively, you can click on the Reports module on the left-hand side of the screen and then click on the ART icon.
2. Click on the triangle to the left of “Public Folder.”
3. Click on the triangle to the left of “HUD CoC APR.”
4. Click on the magnifying glass to the left of “0630-HUD CoC APR Detail”
5. A pop-up box will appear. Click on “View Report.” Or Schedule Report (more information about how to schedule a report is available here: <http://www.hmismn.org/postings/pdfs/scheduling-art-reports.pdf>)
6. A prompt box will appear. You will need to click on each prompt to complete it. Complete the prompts as follows:
 - a. Select Provider Group(s): Skip. Leave set at “**None Selected**”
 - b. Select Providers: **Select your provider(s)** and use the arrow to move them into the “1. Select Provider Group(s)” box. If there are already providers selected, also use the Arrows to send them back to the provider list.
 - c. Enter Start Date: **Start date of your reporting period** (ex. 07/01/2014)
 - d. Enter End date PLUS 1 Day: **One day after the end of your report period** (ex. Report period ends 6/30/2015 use 07/01/2015)
 - e. Select Entry Type: Use HUD
 - f. EDA Provider: Skip. Leave set at “Default Provider.”
 - g. Enter Adult Age: 18
 - h. EDA Provider: Skip. Leave set at “**Default Provider.**” Unless you have a Case Manager 2 “Servicepoint license. Then select the provider for which you want to run the APR.
 - i. Enter Effective Date: **One day after the end of your report period (same as End date).**
 - j. *Is using the Disability Determination field part of your workflow for HUD reporting? Select “**Yes**”
 - k. *Is using the Receiving Income Source field part of your workflow for HUD reporting? Select “**Yes**”
 - l. *Is using the Receiving Benefit field part of your workflow for HUD reporting? Select “**Yes**”
 - m. Is using the Interim Reviews part of your workflow for HUD reporting? Select “**Yes**”
7. Select the “Run Query” button—or the “Enter” button on your keyboard. **Note:** do not hit “return” until all prompts are completed. Hitting return tells the system to run the report.
8. You’ll first see a pop-up box that says, “Retrieving Data”. After all the data has been retrieved, the report will open.
9. Save the report to your computer by going to “Document” in the top left-hand corner of the report. Click “Save to my computer as” (NOT “Save report to my computer as”) and select Excel for the HUD CoC APR .

Detail Report Review

TAB A-SUMMARY

Provides details of the report start and end date and the total counts of clients included in a variety of categories

TAB B-SUMMARY DETAIL

Shows all clients by ID number and highlights data problems in number 7 of the APR. If a client has a “Don’t know” or “Refused” response, the letters “DKR” show up in the data field column. If the information is missing, then “Missing” shows up in the data field column. If the data entry is complete, the data field column is blank.

If a client shows missing information but it appears to be entered into the system, check the “date effective” by clicking the colored bar next to the field in Servicepoint. Often, if an answer is not created with a “date effective” on or before the entry date, information will show as missing. Re-enter this information using the correct “date effective” and save. Delete any incorrect answers.

TAB C-AGE AND GENDER DETAIL

Shows all clients and their responses to the required demographic fields and calculates the APR age field.

Missing information shows up as “null” in red text. Secondary race isn’t a required field if the client only has one race, so “null” in this column may be an ok value for many clients and is not shown in red.

The “Unacc Youth” column calculates if the client meets the HUD definition of an unaccompanied youth. If the client shown is not an unaccompanied youth, check entry/exit connections to make sure the child is properly connected to a family. See instructions here for fixing household connections: [Household Instructions](#)

Any non-HUD responses show up in red font with a yellow background. “Other” has been an acceptable response in the past, but is not in the current APR. Having “Other” chosen as a response for Race or Secondary Race will cause a red “missing” flag in your HUD CoC APR Detail report. If you have selected this as an option for a client, please update it to a response option with (HUD) after it if possible, being sure to delete the “Other” option from the response history using the colored bar.

TAB D-ASSESSMENT DETAIL

Shows all clients by ID number and includes all clients. Fields with missing information show up as “null” in red. Housing Status is no longer required for clients and will likely be eliminated from the next version of the APR.

The rest of the fields are required for adults 18+ and unaccompanied youth and for these clients, missing is indicated by a red “null.” Make sure to look for and update this information. Extent of Domestic Violence (DV Ext) show up as a black null if the client says “no” to the Domestic Violence Victim/Survivor question. It isn’t necessary to provide an answer in the DV Ext question for these clients.

For clients under 18, fields that aren’t required have “not required” show up in the column in blue. These fields include veteran status, domestic violence, and living situation last night questions.

TAB E-MASTER HOUSEHOLD DETAIL

This tab provides details on clients grouped together in households for question #9 and is grouped by HUD household type. If you have questions about the household counts in #9, use this to help verify people are grouped together correctly. Household groups are based both on who is linked together in the household and on the entry/exit. It is especially important to check for single people who may have accidentally been excluded from an entry/exit with other household members. The age is included on the tab, which is helpful in looking for young children who have an entry/exit on their own, which is likely a mistake.

TAB F-CLIENT HOUSEHOLD DETAIL

This tab also provides details on household information used throughout the APR. Because the rules for “master household” used in question number 9 and household groups by clients used in the rest of the report questions are different, you will want to look at this tab as well. The tab is divided into sections by HUD Household type and provides the household type used for each client.

TAB G-MASTER HOUSEHOLD MEMBERSHIP

This tab also provides information for question 9 on the “master household” counts, but is grouped by client rather than household. This tab may provide additional information to help you understand household information.

TAB H-CLIENT HOUSEHOLD MEMBERSHIP

This tab provides information by client on their household type used in all other questions in the APR other than number 9. It may be helpful in understanding how clients are included in different household types.

TAB I-ENTRY/EXIT DETAIL

This tab provides detailed entry and exit information for clients, including the master Household type. If clients haven’t exited, “No Exit” will appear in blue in both the Exit Date and Destination fields. Missing values show up as “null” in red. Use this report to verify entry and exit dates are correct along with Destination. The report only pulls the last/most recent program entry within the report period.

TAB J-INCOME DETAIL

Includes income for all clients based on their last/most recent program entry and includes sections for income at entry and exit/follow-up. Each income record will have a line on the table.

If the record was created at entry, the source and amount will be listed in the “Entry Income” section. If the record is still valid at follow-up or exit, it will also be listed in that section of the table. However, if the income record ends before follow-up or exit, “No Record” will be displayed in that section. This does not indicate an error, it is just explaining that there is no amount because there is no active record at the time.

Similarly, if an income record is created after the client’s entry date, the Entry Income section of the table will list “No Record” for that income record, but the source and amount will be displayed at exit/follow-up (Unless the income is ended before then).

NOTE: Interim Review - Annual Assessment

If a client has been in your program for more than a year as of the report end date, and has not exited, an interim review must be recorded. If the Interim Review has been recorded, the income records that are effective on the Interim Review date will display in the "Exit/follow-up Income" section of the report, in green text. **If the interim review is not recorded, the record will display in green font, and have a 'strike-through' line on it. You should create an interim review for these clients.**

Be sure to check the column for Entry Income YN at entry, which represents the "Income received from any source" question in the system. All clients 18+ should have this completed. If a client has exited, this question should be updated to reflect their income at exit. If nothing has changed, there is no need to update this field.

If clients 18+ don't have an income sub-assessment record, this will be indicated by "No Record" in blue—in both the Entry Income and Exit/Follow-up Income sections. Make sure clients who have a "yes" for the Entry Income YN at entry have a sub-assessment record filled out in the questions under "Entry Income" and the same is true for exit income.

Records with conflicts between the general yes/no question and the sub-assessment data are highlighted in red in the "Entry Income YN" column for income at entry, and in the "Exit/FU Income YN" column for exit or Interim Review income. For example, if a client has a NO recorded for income at entry but there is income recorded in the sub-assessment, the report will highlight this conflict in red. The same is true at exit.

Income sources that do not have "(HUD)" behind them are not valid HUD income sources; they will be displayed on the detail report with a yellow background and red font. These income records will not be counted toward the amount of total income for this client. It is okay to keep this income source on the client's record; just keep in mind that this income will be excluded from the total.

TAB K-NON CASH BENEFITS

This tab provides very similar information to the income tab in a similar format for all clients, but for the Non-Cash Benefits sub-assessment.

If clients 18+ don't have a benefits sub-assessment record, this will be indicated by "No Record" in blue—in both the Entry Non-Cash Benefits and Exit Non-Cash Benefit sections.

If the client does have a benefit record created at entry, the source will be listed in the "Entry Non-Cash Benefits" section. If the record is still valid at follow-up or exit, it will also be listed in that section of the table—for non-cash benefits, this section is labeled "Exit/FU NC YN".

However, if the benefit record ends before follow-up or exit, "No Record" will be displayed in that section. This does not indicate an error, it is just explaining that there is no benefit source because there is no active record at the time.

Similarly, if a benefit record is created after the client's entry date, the Entry Non-Cash Benefits section of the table will list "No Record" for that benefit record, but the source will be displayed at exit/follow-up (Unless the income is ended before then).

NOTE: Interim Review - Annual Assessment

If a client has been in your program for more than a year as of the report end date, and has not exited, an interim review of non-cash benefits must be recorded. If the interim review has been recorded, the non-cash benefits that are effective on the review date will be displayed in the “Exit Non-Cash Benefits” section of the table with green text. **If the interim review is not recorded, the benefit record will still appear on the Exit Non-Cash Benefit section with green text. However, the record will have a ‘strike-through’ line on it. You should record an interim review for these clients.**

Be sure to check the column for Entry NC YN, which represents the “Non-cash benefit received” question in ServicePoint. All clients should have this completed. If a client has exited, this question should be updated to reflect their benefits at exit.

Make sure clients who have a “yes” for the Entry NC YN at entry have something filled out in the questions under “Entry Non-Cash Benefits” and the same is true for exit Non-Cash Benefits. Records with conflicts between the general yes/no question and the sub-assessment data are highlighted in red in the “Entry NC YN” column for Non-Cash Benefits at Entry, and in the “Exit NC YN” column for exit or Interim Review non-cash benefits.

Non-Cash Benefit sources that do not have “(HUD)” behind them are not valid HUD sources; they will be displayed on the detail report with a yellow background and red font. These records will not be counted as non-cash benefits for this client.

TAB L- DISABILITY DETAIL

Disability data is required for all clients. This tab includes both the general “does client have disability of long duration” question (required for adults 18+) and the disability sub-assessment data (required for all clients) both at entry and exit. The “disability of long-duration” question is represented on the report by the column “Disab YN.” If this question is missing, the report will show “null” in red. The Determination column is the “Disability determination” field from the sub-assessment.

If clients haven’t exited, they will show up as “No Exit” in blue in the fields in the Exit Disability section of the tab. If there is no disability recorded in the sub-assessment, this will show up in blue as “No Record.”

Disability records that conflict with the Entry Disab YN or Exit Disab YN fields will be highlighted in red. These are errors and should be corrected.

Disabilities that aren’t HUD specific (depicted in ServicePoint with (HUD) after the term on the option list) show up highlighted in yellow with red text. These will not be included in your report.

TAB M-DUPLICATE CLIENTS

In some cases, clients may have more than one record entered into ServicePoint and included in the report. This tab helps identify if you have any clients with this problem. If you do, one of the records should be deleted so the client isn’t counted twice in the report. Contact Wilder for help merging client records.

TAB N-ADDITIONAL INFORMATION

This tab provides details on the prompt information selected when the report was run and client counts for each provider selected. Check this tab to make sure you entered all the correct information for each prompt.

Data checking for Question 36:

The best way to make sure the data included in question 36 is correct is to make sure that the entry and exit dates, income, (and disabilities if Street Outreach) are correct in the tabs of the data check report. Please review these carefully.

Optional Input Controls:

The Input Controls give you the ability to filter the information you see.

← The Input Control Panel is located in a toolbar column to the left of the report viewing screen.

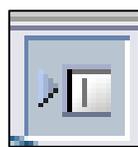
If you do not see a separate column at all, your toolbar may be hidden. You should be able to see a small black triangle on the middle part of the left edge of the screen where the toolbar should be. It would look like this:

Click on that arrow and the toolbar will re-appear. →

AT THE BOTTOM OF THIS COLUMN THERE ARE 4 DIFFERENT TOOLBAR ICONS:



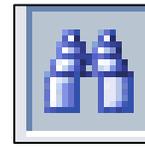
Navigation Map
This will list the separate report tabs.



User Prompt Input
Shows how you answered the prompts used to run the report.

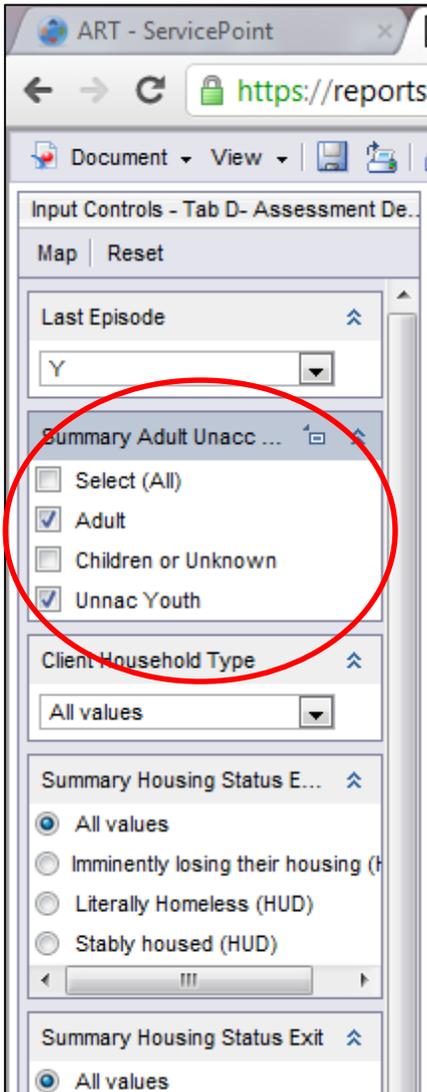


Input Controls
Toolbar needed to modify the input controls.



Search
Use this to search for text within report.

The icons are small, but if you hover over them, the description will pop up. To use the input control toolbar, click on the Input Control icon (Number 3 above).



Once you click on this, the Input Control toolbar will appear on the left side of the report.

← For example, on Tab D for Assessment data

By checking the options shown, you are filtering the report to show only the requested data. For example, to select only the 18+ clients or youth on their own, unselect the “Children or unknown” option by clicking on the check box next to it. You then will only see the Adults and Unaccompanied youth on the reports. If you want to see all clients again click in the “Select (All)” box. The data in the report will change as soon as you do this.

There are input controls available on each tab, but each tab will have different controls. When you select an input control on one tab, it does not affect the data on other tabs. You need to save the filters for each tab separately.

On each tab you modify, if you want to save this set of data, you will need to save the report to your computer after you set the input controls to different groups. So if you want to save just the Adults and Unaccompanied Youth, you would set the input controls, save to your computer as Excel. If you wanted to see a different group on this tab, you would need to re-set the input controls and save the report to your computer as a separate document.

At the end of each tab there is a section that describes the filters that have been applied for the data that you saved. This will have you remember exactly what filters you applied when you saved the report.