Annual Assessment Reports

January 2021

Reports for Any User

How to Run APR and CAPER Reports

1 Confirm your default or select Enter Data As for the ESG project.

Mode: Shadow
Enter Data As
Back Date
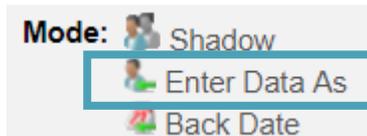
2 Click "Reports" on the left side of the Home Page Dashboard

Home > Home Page Dashboard

Last Viewed | Favorites
Home
ClientPoint
ResourcePoint
FundManager
ShelterPoint
SkanPoint
Reports
Admin
Logout

3

Provider Reports

Annual Homeless Assessment Report (AHAR)

Call Record Report

Client Served Report

CoC-APR

Entry/Exit Report

ESG CAPER (HDS V5)

Fund Availability Report

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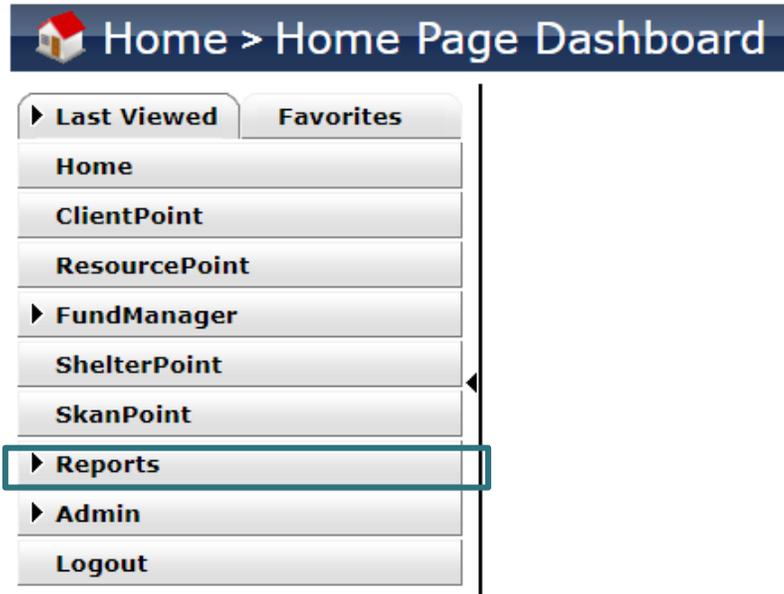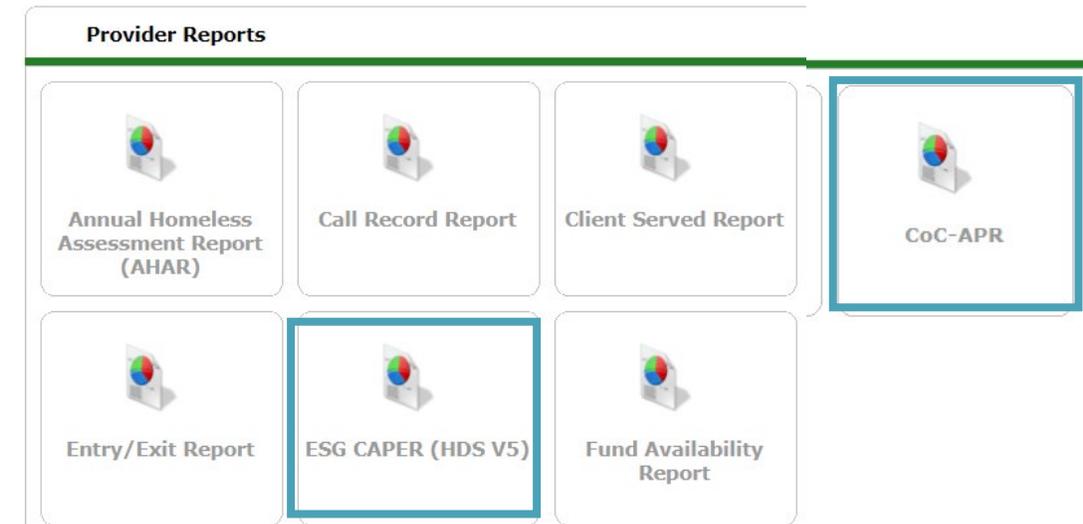
How to Run APR and CAPER Reports

Prompt	Description
Provider Type*	Select "Provider"
Provider	Automatically selected based on EDA mode. Select "This provider ONLY"
Program Date Range	For Sage submission, use the grant year. For DQ or outcome checks, use appropriate range.
Entry/Exit Types	Select "HUD" or appropriate type

Special Note: If you have consolidated grants that are separate projects in HMIS, contact us ASAP for a reporting group

How to Run APR and CAPER Reports

- Check your prompts
- Select the Build Report button to run!

Build Report

Report Options

Provider Type	⦿ Provider ◯ Reporting Group												
Provider *	Heading Home - Rowan County - Rapid Re-Housing - HUD (7441) ▾												
	◯ This provider AND its subordinates ⦿ This provider ONLY												
Program Date Range *	01 / 01 / 2017 📅🔄📅 to 12 / 31 / 2017 📅🔄📅												
Entry/Exit Types *	☐ Basic	☐ Basic Center Program Entry/Exit	☑ HUD	☐ PATH	☐ Quick Call	☐ RHY	☐ Standard	☐ Transitional Living Program Entry/Exit		☐ VA	☐ HPRP (Retired)		

Build Report	Download	Clear

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How to Read APR and CAPER Reports

- Select the **blue** numbers in the Don't Know/Refused and Data Not Collected columns to view a list of clients who are missing HMIS data.

check all report sections

6a - Data Quality: Personally Identifiable Information				
Data Element	**Client Doesn't Know/Client Refused**	**Information Missing**	**Data Issues**	**% of Error Rate**
Name (3.1)	0	0	0	0%
SSN (3.2)	3	2	4	6%
Date of Birth (3.3)	0	1	2	2%
Race (3.4)	0	0		0%
Ethnicity (3.5)	1	0		1%
Gender (3.6)	0	0		0%
Overall Score				**8%**

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How to Read APR and CAPER Reports

- Or select the **blue** numbers in Don't Know/Refused and Data Not Collected rows to view a list of clients who are missing HMIS data.

check all report sections

21 - Health Insurance	At Start	At Annual Assessment for Stayers	At Exit for Leavers
MEDICAID	189	0	149
MEDICARE	89	0	62
State Children's Health Insurance Program	0	0	0
Veteran's Administration (VA) Medical Services	76	0	56
Employer-Provided Health Insurance	10	0	5
Client doesn't know/Client refused	6	0	5
Data not collected	40	4	23
Number of stayers not yet required to have an annual assessment		212	
1 Source of Health Insurance	287	0	209
More than 1 Source of Health Insurance	50	0	42

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How to Read APR and CAPER Reports

- The **blue** numbers open a list of the client IDs and full names will appear. Review this list to identify which clients are included in that row or download the to export the list.

Clients in answer cell

6e - Data Quality: Timeliness

Number of Project Start Records

ID	Client
157	Doe, Baby
238	Froman, Abe
91	Xavier, Charles
Showing 1-3 of 3	

Download Results   Exit

⚠️ Protect client data with Personally Identifying information

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How to Read APR and CAPER Reports

- Use Question 6c as a quick proxy.
    - If Annuals Assessments are not entered, it's impossible to track Income!

6c - Data Quality: Income and Housing Data Quality		
Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0%
Income and Sources (4.2) at Start	1	13%
Income and Sources (4.2) at Annual Assessment	0	0%
Income and Sources (4.2) at Exit	0	0%

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How to Read APR and CAPER Reports

- Annuals are also found in Q21 about Health Insurance

21 - Health Insurance	At Start	At Annual Assessment for Stayers	At Exit for Leavers
MEDICAID	20	0	0
MEDICARE	0	0	0
State Children's Health Insurance Program	0	0	0
Veteran's Administration (VA) Medical Services	0	0	0
Employer-Provided Health Insurance	2	0	0
Health Insurance obtained through COBRA	0	0	0
Private Pay Health Insurance	1	0	0
State Health Insurance for Adults	0	0	0
Indian Health Services Program	0	0	0
Other	0	0	0
No Health Insurance	3	0	0
Client doesn't know/Client refused	0	0	0
Data not collected	4	0	0
Number of stayers not yet required to have an annual assessment		30	
1 Source of Health Insurance	23	0	0
More than 1 Source of Health Insurance	0	0	0

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How to Read APR and CAPER Reports

- Question 20b on the APR can be confusing:

   Data Not Collected (only on 20b) includes clients who are not yet required to have an Annual Assessment.

   Use Income and Health Insurance questions that reference Annuals to check for errors – not 20b on Non-Cash Benefits

20b - Number of Non-Cash Benefit Sources	Benefit at Start	Benefit at Latest Annual Assessment for Stayers	Benefit at Exit for Leavers
No Sources	9	0	6
1 + Source(s)	15	1	12
Client Doesn't Know/Client Refused	0	0	0
Data not collected	0	5	0
Total	24	6	18

These clients may not have an Annual Assessment error

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Reports for Agency Admins

How to Run ART Report

Use the **A007 – Annual Review Audit Report V5** for a comprehensive review of upcoming and overdue Annual Assessments

Click here to Schedule your report

- Public Folder
  - ART Gallery Reports and Resources
  - HMIS@NCCEH Gallery
    - !HMIS@NCCEH Gallery Naming Convention .pdf
    - A001 - All Clients Demographics Report -Additional County Tabs - Provider
    - A002 - Homeless Demographics Report v10- Provider
    - A003 - Chronic Homeless Count Report v4- Provider
    - A004 - Enrolled Clients Count with Time in Program v C1.2
    - A005 - Program Exit (Enrolled) Previous Year
    - A006 - Unexited Clients w Summary Tab- By Provider Page (With Max Exit Date)
    - A007 - Annual Review Audit Report V5 (BETA TEST) 9-9-16
    - A008 - Client Location Audit Report
    - A009 - Destination Client Level Audit Report (for LSA Use)
    - A011 - Disability DQ Report -v2

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How to Run ART Report

Use the prompts to run for your projects. You must have access to a **Reporting Group** for this report.
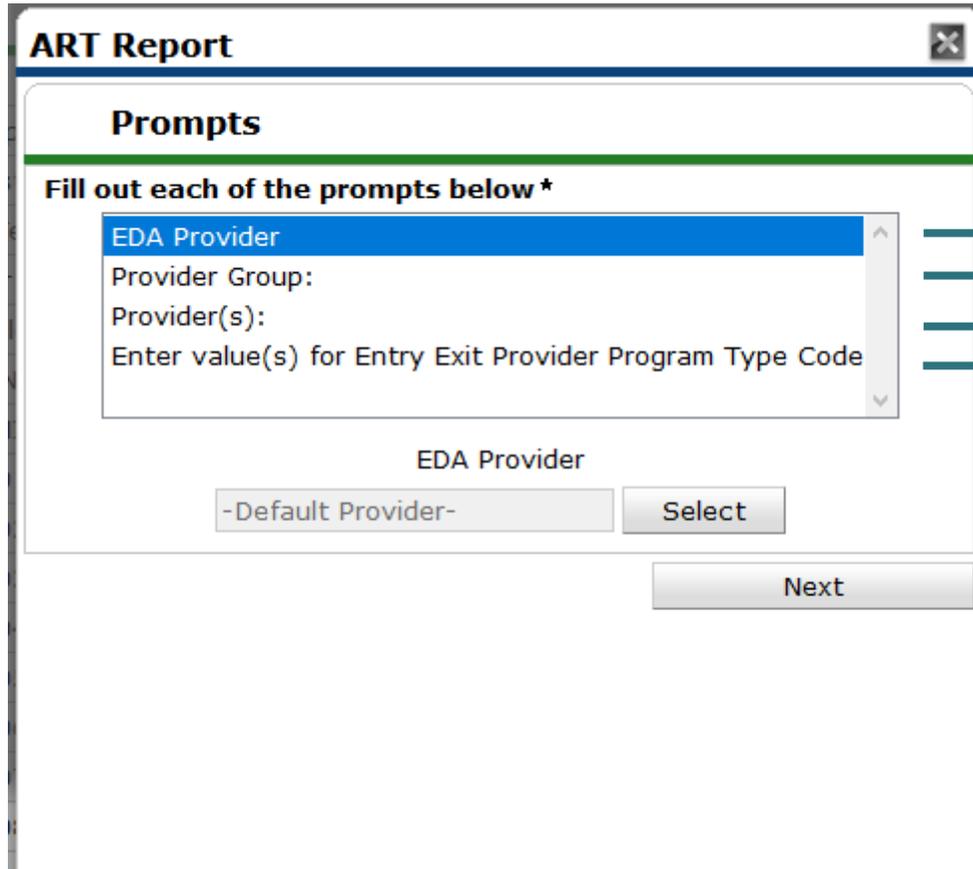
ART Report

Prompts

Fill out each of the prompts below *

EDA Provider	→ Leave as Default
Provider Group:	→ Required: Select a Reporting Group
Provider(s):	→ Optional: specify projects
Enter value(s) for Entry Exit Provider Program Type Code	→ Leave all included

EDA Provider

-Default Provider-   [Select]

[Next]

14

How to Read ART Report

Use report tabs to find the status of individual clients as of today's date.

Within the window this month

Annual must be backdated

Plan for next month's Annuals

Provider Prompts	Annual Review Status (All)	DUE NOW	COMING DUE	PAST DUE	⊕

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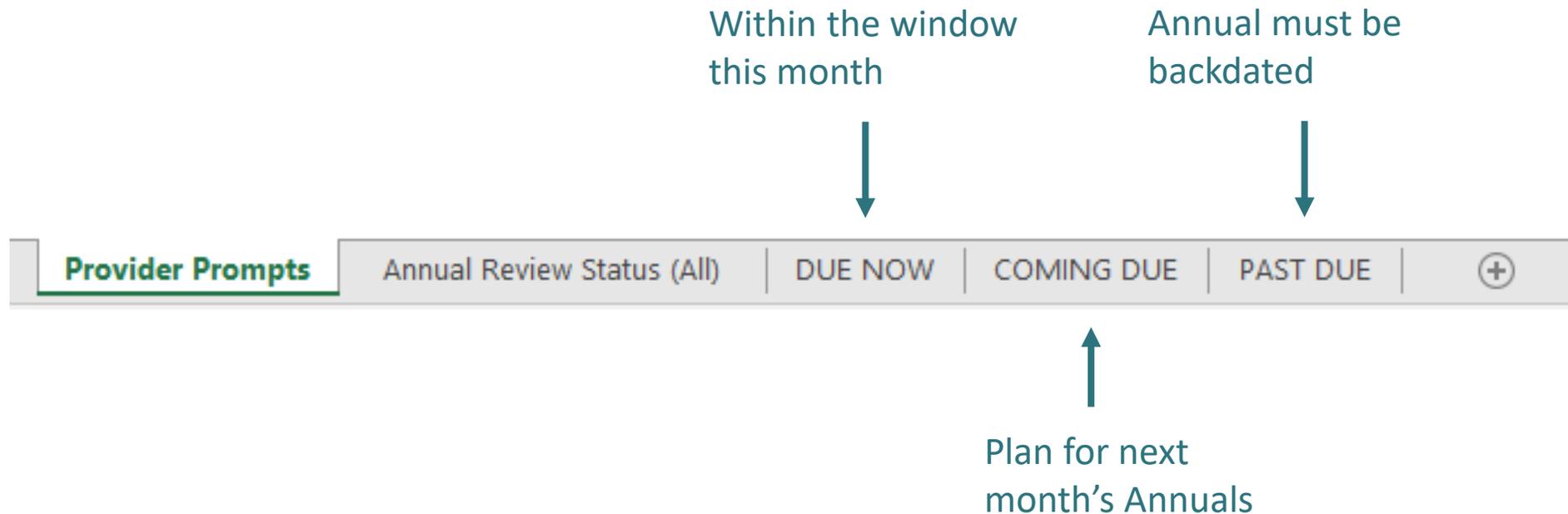
Alternative ART Report

SPM Measure 4: Employment and Income Growth in ART

Public Folder > ART Gallery > ART Gallery Reports > 0703 Report

Will only pull CoC Funded projects

SPM Measure 4: Employment and Income Growth in ART

Prompt	Response
Select Provider	Select your CoC funded projects with
Select CoC Code	Leave Blank
Enter Prior Year Start Date	Enter one year date before the first day of the year
Enter Current Year Start Date	Enter first date to pull in data
Enter Current Year End Date PLUS 1 Day	Enter last date to pull in data Plus one day
EDA Provider	If running for 1 project, select project with If running for multiple projects, leave as Default Provider
Enter Effective Date	Enter last date to pull in data Plus one day

SPM Measure 4: Employment and Income Growth in ART

- Summary separates earned income, non-employment, and together the total income for clients based on staying or leaving a project

	A	B	C	D	E

Metric 4.1 - Change in earned income for adult system stayers during the reporting period

	Prior Year Counts	Current Year Counts	Difference
Number of adults (system stayers)	125	101	-24
Number of adults with increased earned income	4	4	
Percentage of adults who increased earned income	3%	4%	1%

Metric 4.2 - Change in non-employment cash income for adult system stayers during the reporting period

	Prior Year Counts	Current Year Counts	Difference
Number of adults (systems stayers)	45	48	3

Tab A - Summary   Tab B - Detail   Tab C - Transaction Detail   1 ...

SPM Measure 4: Employment and Income Growth in ART

- Detail tab will look at past two years for Annuals, but include every Annual as a row for every client

	A	B	D	E	F	G	H	I	J	K
1	Client Uid	Unique Id 67	Provider	Proj Type	Start Date	End Date	Entry Exit Review	Prior Outside +/-30	Current Outside +/-30	FY
9			Cardinal Innovations - Orange County - PSH Concern of Durham - HUD(1698)	PSH	7/1/2006		7/8/2013			PC
10			Cardinal Innovations - Orange County - PSH Concern of Durham - HUD(1698)	PSH	7/1/2006		7/1/2014			PC
11			Cardinal Innovations - Orange County - PSH Concern of Durham - HUD(1698)	PSH	7/1/2006		7/1/2015			PC
12			Cardinal Innovations - Orange County - PSH Concern of Durham - HUD(1698)	PSH	7/1/2006		7/6/2016	Ok		PC
13			Cardinal Innovations - Orange County - PSH Concern of Durham - HUD(1698)	PSH	7/1/2006		7/1/2017		Ok	PC

Tab A - Summary | Tab B - Detail | Tab C - Transaction Detail | **Tab D - Review Accuracy** | Tab E …

C = Current Year
PC = Prior & Current Year
P = Prior Year

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Contact NCCEH

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919.755.4393

Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997

NCEndHomelessness

@NCHomelessness

nc_end_homelessness

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