

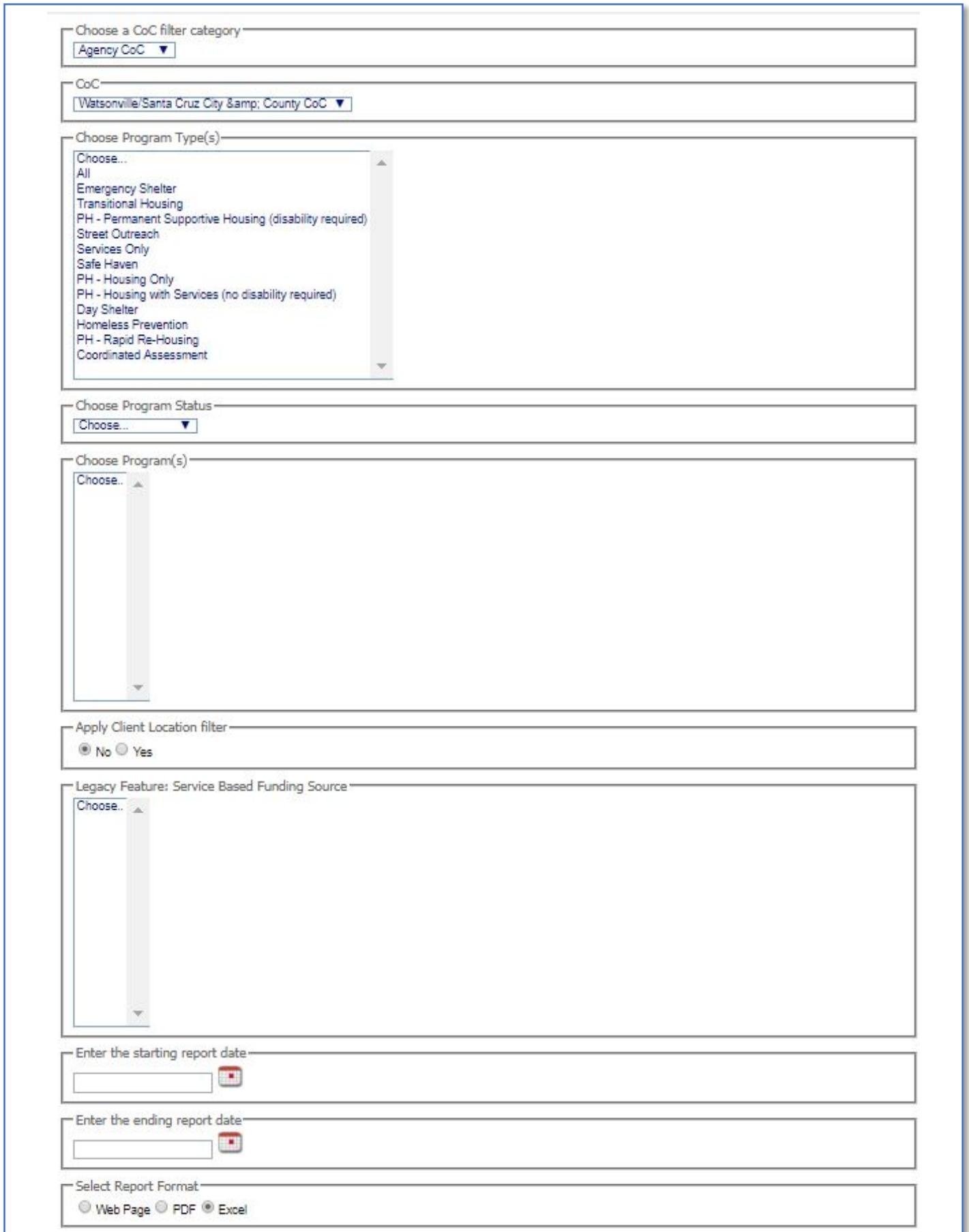
APR Protocols

The generation and submission of APRs (Annual Performance Reports) in Clarity is substantially different than Service Point.

Step 1

Access the APR in Clarity

1. Launcher Icon  > Reports.
2. Click the *HUD Reports* section to expand and view the list of HUD reports. Select [HUDX-227] Annual Performance Report [Oct 2017] or [HUDX-228] ESG CAPER [Oct 2017]
3. Enter in the report parameters:



The screenshot shows a web-based form for generating an Annual Performance Report (APR) in Clarity. The form is organized into several sections, each with a title and a set of controls:

- Choose a CoC filter category:** A dropdown menu with "Agency CoC" selected.
- CoC:** A dropdown menu with "Watsonville/Santa Cruz City & County CoC" selected.
- Choose Program Type(s):** A scrollable list box containing the following options: "Choose...", "All", "Emergency Shelter", "Transitional Housing", "PH - Permanent Supportive Housing (disability required)", "Street Outreach", "Services Only", "Safe Haven", "PH - Housing Only", "PH - Housing with Services (no disability required)", "Day Shelter", "Homeless Prevention", "PH - Rapid Re-Housing", and "Coordinated Assessment".
- Choose Program Status:** A dropdown menu with "Choose..." selected.
- Choose Program(s):** A scrollable list box with "Choose..." selected.
- Apply Client Location filter:** Radio buttons for "No" (selected) and "Yes".
- Legacy Feature: Service Based Funding Source:** A scrollable list box with "Choose..." selected.
- Enter the starting report date:** A text input field with a calendar icon to its right.
- Enter the ending report date:** A text input field with a calendar icon to its right.
- Select Report Format:** Radio buttons for "Web Page", "PDF", and "Excel" (selected).

Step 2

Create an Excel file

1. Select Excel at the bottom of the screen in the *Report Output Format* section.
2. **Note: Do not modify the contents of the Excel file as this may render the file unusable. If desired, you may change the name of the Excel file, however do not change the .xls file extension.**
4. Press Okay.
5. The file will be downloaded as an Excel file.
6. Depending on your Process Method, either download the Excel file to your computer, or email the Excel file to your email address.

Step 3

Upload the Excel file

1. Upload the Excel file to <http://reporting.hmis.cc/>
2. Fill out the prompts

APR/ESG CAPER - CSV EXTRACT

Processing Report	APR (Oct 2017) ▼
Process Method	Download ZIP File ▼

📁 Drop file here to upload or [Select file](#)
Note: only xls (xlsx) files are allowed to be uploaded

[Process](#)

3. Upload the *CSV file to Sage*