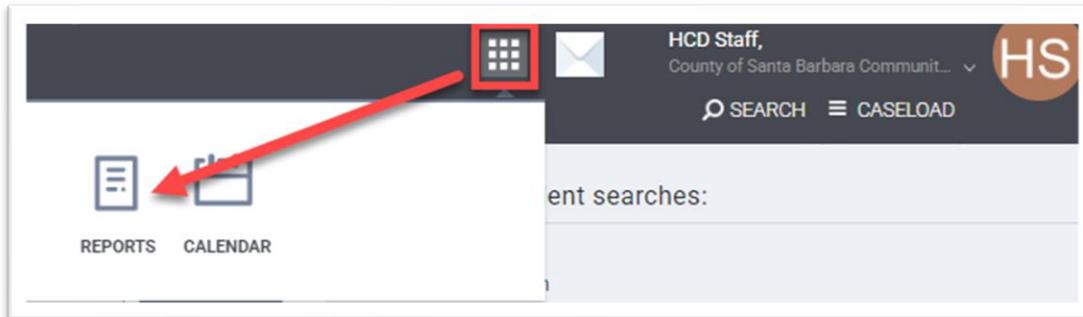


[HUDX-227] Annual Performance Report

Additional information from Bitfocus Clarity can be found here: [\[HUDX-227\] Annual Performance Report](#)

How to Run the APR report in Clarity HMIS

- 1) Click the **Menu** icon in the upper right-hand corner
- 2) Click **REPORTS**



- 3) In the REPORT LIBRARY, scroll down to HUD Reports and **EXPAND** the section to see available reports
- 4) Locate the APR report: **[HUDX-227] Annual Performance Report [FY 2024]**
- 5) Click **RUN** – note that user can click the **Star** icon to add to favorites at the top

REPORT LIBRARY

Favorite Reports	0 report(s) ▾
Data Quality Reports	6 report(s) ▾
Service Based Reports	13 report(s) ▾
Program Based Reports	23 report(s) ▾
Assessment Based Reports	4 report(s) ▾
Profile Screen Reports	1 report(s) ▾
Housing	5 report(s) ▾
HUD Reports	8 report(s) ▾

[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]	★ ⏸ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-224] PATH Annual Report [FY 2024]	★ ⏸ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-225] HMIS Data Quality Report [FY 2024]	★ ⏸ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-227] Annual Performance Report [FY 2024]	★ ⏸ RUN 📅 SCHEDULE MORE INFO ▾

- 6) Choose Agency
- 7) CoC Filter Category – set to **“Agency CoC”**
- 8) CoC – set to **CA-603 – “Santa Maria/Santa Barbara County”**
- 9) Project Type(s) – select desired project type(s). Users can hold the **CTRL** button down and click on multiple project types with their mouse. Release the CTRL button after desired projects are highlighted.
- 10) Program Status – set to **“Active Programs”**
- 11) Programs(s) – select the project(s) the APR will analyze. Users can hold the **CTRL** button down and click on multiple projects with their mouse. Release the CTRL button after desired projects are highlighted.

HUD Reports > [HUDX-227] Annual Performance Report [FY 2024]

Switch Access Agency(-ies)

Choose...

County of Santa Barbara Community Services (HAP)

CoC Filter Category

Agency CoC



CoC

CA-603 - Santa Maria/Santa Barbara County



Project Type(s)

Choose...

All

Emergency Shelter – Entry Exit

Emergency Shelter – Night-by-Night

Transitional Housing



Program Status

Active Programs



Program(s)

Choose...

CES Coordinated Entry System Shared (244)

- 12) Apply Enrollment CoC Filter – leave as default “**NO**”
- 13) Funding Criteria – set to “**Not Based on Funding Source**”
- 14) Client ID Selection – leave as default “**Clarity Unique Identifier**”

15) Enter desired **Report Date Range**

16) Choose desired Report output option

Web Page – results will open in browser

PDF – results will be a PDF file that downloads into user’s downloads folder

Excel – results will be an Excel file that downloads into user’s downloads folder

CSV-Details – results will be in a .ZIP file with a detail subset of CSV files

CSV-Upload– results will be in a .ZIP file with CSV files and will include **ALL** CSV files needed for upload

17) Choose desired Drilldown Output Format (only visible if Web Page option is selected above)

Web Page – when results web page is open, user can click on a number and a new web page will open with client info. There are hyperlinks that will take user to client profile.

CSV – when results web page is open, user can click on a number and a CSV file will be generated and downloaded onto user’s computer with client details.

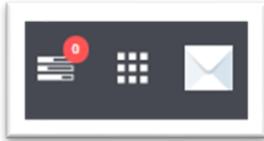
18) Click **Submit**

The screenshot shows a web form with the following fields and options:

- Apply Enrollment CoC Filter**: No (dropdown arrow)
- LEGACY FEATURE: SERVICE BASED FUNDING SOURCE**
- Funding Criteria**: Not Based on Funding Source (dropdown arrow)
- Client ID Selection** ⓘ: Clarity Unique Identifier (dropdown arrow)
- Report Date Range**: 10/01/2023 (calendar icon) – 09/30/2024 (calendar icon)
- Report Output Format**: Web Page PDF Excel CSV-Details CSV-Upload
- Drilldown Output Format**: Web Page CSV

A red rectangular box highlights the **SUBMIT** button at the bottom right of the form.

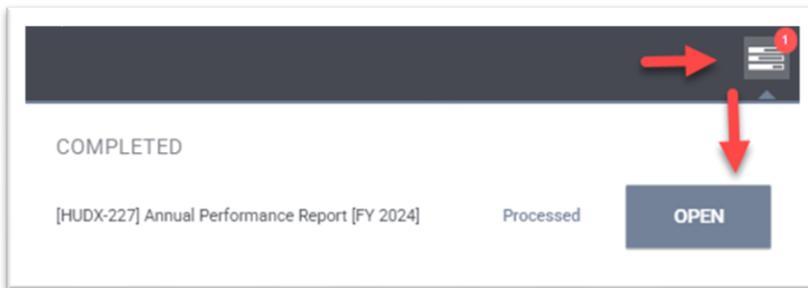
19) When report is running there will be a red "0" near the Menu icon at the top of the screen



20) When report is complete a notification will appear with an option to Open



21) Users can open a report later as well by going to the top right of the screen where the red "0" has turned into a red "1"



22) **PLEASE NOTE:** Clarity will only save one record of a report at a time. If a second APR is run, the report will be replaced. User should run as a downloadable file and download each report for future use—if multiple files must be run.