

APR for CoC Projects Export Guide

The following guide overviews the **APR for CoC Projects 2018 Export** (CoC APR) that is now available within the PA HMIS to be used for annual reporting of the CoC grants and their projects. This guide will help users locate and use the APR Export reporting process for submission to the SAGE HMIS reporting system.

Please note that the CoC APR an export that contains 66 separate CSV (excel) files in a predefined format placed into a single ZIP file. Once generated from PA HMIS, grantees will need to use this ZIP file, which contains their CoC APR information, and submit it to HUD through the SAGE reporting system.

All users with access to the new PA HMIS/Client Track system will have access to the CoC APR Export, and is located under the **Home -> Case Manager Report** area. There are four folders in this area, and this report is located within the HUD / HMIS Reports -> HUD APR/ESG Exports section within the **APR for CoC Projects 2018 Export** option.



After selecting the Case Manager Reports folder, hover over the HUD / HMIS Reports folder, which allows for the individual reports to appear. Hover over the HUD APR / ESG Exports folder and you will see the APR and ESG exports and HUD data quality report options. Select the **APR for CoC Funded Export** to load the export/report screen.


Once you have selected the report/export option, the options to generate your CoC APR will be very much the same as in the past.

Date Range: the report allows you to enter in a date range for the export, which will determine which clients served to include. You can use the new predefined time ranges or can manually enter in your APR or Grant dates.

Date Range List:

Begin Date: to

Organization: the report will require you to select the organization in which you want to report on and most of the time will automatically select your organization for you (defaults if you have access to only a single organization).

organizations should be included in the report by selecting each organization separately, or click the  icon to select all organizations you are authorized to view.

Organization: *

Program Type/Program: the system will require you to first select the Program Type of your APR project from the drop-down list and includes the standard options such as Transitional Housing, Permanent Supportive Housing, Rapid Rehousing, etc.). Once a Program Type is selected the **Program** option will appear and will automatically filter your programs by the program type chosen and based on the organization(s) chosen above.

The CoC APR export is designed to only generate and report data on 1 project at a time and only a single program can be selected from your list.

Program Type: *

Program: *

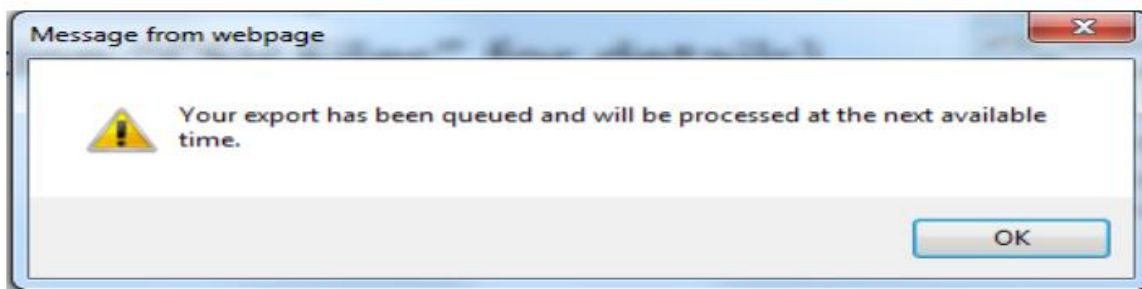
Generate the Export: Once the export/report filters have been properly set, select the “Run Export” button on the bottom right-hand side of the screen, this will start the APR generate process in PA HMIS. You will be prompted with the following questions, which include Encrypt Export, Include Header Row in CSV File(s) and Always Quote CSV Value(s).

The screenshot shows a window with the following options:

- Encrypt Export: ☒
- Password: *
- Confirm Password: *
- Include Header Row in CSV File(s): ☒ (Callout: Always check the "Include Header Row" option)
- Always Quote CSV Values(s): ☐ (Callout: Do not check the "Always Quote CSV value" option)

With the Encrypt Export, if you select this option the system will ask for a secure password. If you uncheck this option no password is needed. **Please note that if you do secure the export you will need to use the password entered during this process to retrieve your APR files.**

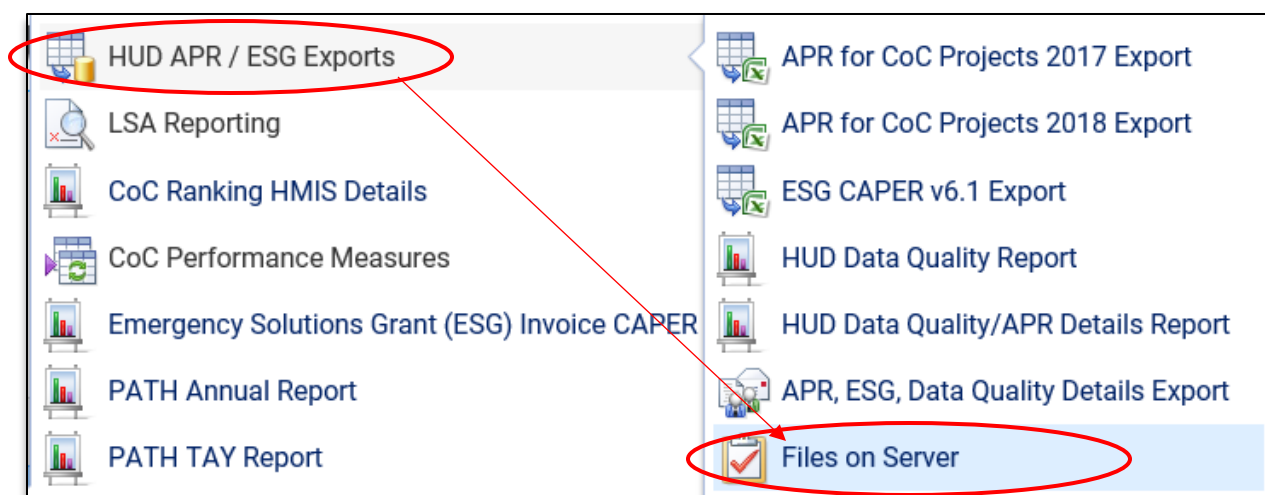
Once you have completed this step hit "Done" on the window and the system will provide you with the following message.



Please note that since this is no longer a report and is a collection of data files the APR will not generate automatically. Your APR will be placed into a queue and will be processed over a period of 20-30 minutes depending on the size of your data and the number of organizations requesting APRs.





Retrieving the APR Export: once your APR file has been completed, sometime after the processing timeframe, you can use the **Files on Server** option/screen to retrieve your export. This is where all APR files (and all exports) are placed once they have been finalized by PA HMIS.

The **Files on Server** is located within the same CoC APR folder displayed earlier, and is the bottom option in the sub-folder.







When viewing this option, it will display your APR file when complete as each file will be listed on its own row. If the screen is empty please give the system more time to complete the processing of your file.

For each APR you generate, you will see 2 files. The first file generated will be named **HMIS APR_CAPER 6.3 Pre-Load_....**, the 2nd file will be named **HMIS APR 6.3 Export....**

File Name		
		HMIS APR 6.3 Export_20180928183353.zip
		HMIS APR_CAPER 6.3 Pre-Load_20180928183035.zip

The file you need for your submission to the HUD SAGE system is the one named **HMIS APR 6.3 Export, which is the one highlighted above with the RED BOX.**

The 2nd file which indicates “...APR_CAPER...Pre-Load...” is only an internal file and is not needed and should be discarded/deleted and not used (to delete a file select the red X icon for that file).

		HMIS APR 6.3 Export_20181002181635.zip	Brian Miller	10/2/2018 6:16:35 PM
		HMIS APR_CAPER 6.3 Pre-Load_20181002180145.zip	Brian Miller	10/2/2018 6:01:45 PM

To download your file you need, the one named HMIS APR 6.3 Export, use the first icon in the row (green arrow) to begin the process. Once you click this icon your computer’s operating system will walk you through the steps of saving (and naming) this file to your local computer.

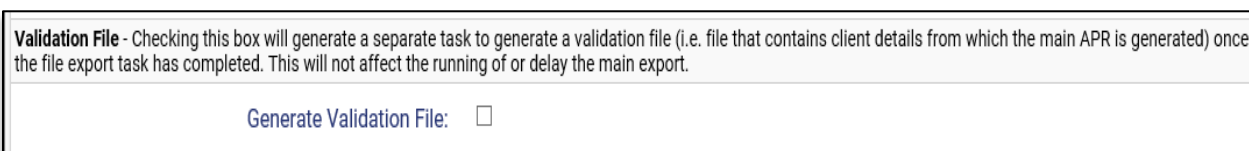


Once you begin the download you should see a pop-up message from your computer asking you to open / save the file. We recommend using the Save -> Save As function which allows you to save it to a specific location on your computer and name the file something easy to find later (APR for Program ABC).



Please note that if you have not encrypted the APR file, it will generate in the needed .zip format and can be downloaded and directly uploaded to HUD's SAGE Repository. If you have encrypted the APR file please see the instructions below on retrieving your files and making them SAGE upload ready.

Generate Validation File: with the 2018 APR, a new option was added to the export that will allow for an additional Validation or Data Details file to be generated along with your APR file(s). When checking the below option, prior to running the export, a 3rd file will appear in the Files on Server area.



The validation file will be called **HMIS APR_CAPER 6.3 Validation...** and will appear along with the above mentioned "Pre-Load" and APR Export files. This file can be downloaded and viewed and contains several excel files that contain overall client data included in your APR and specific subsets of data related to specific questions.



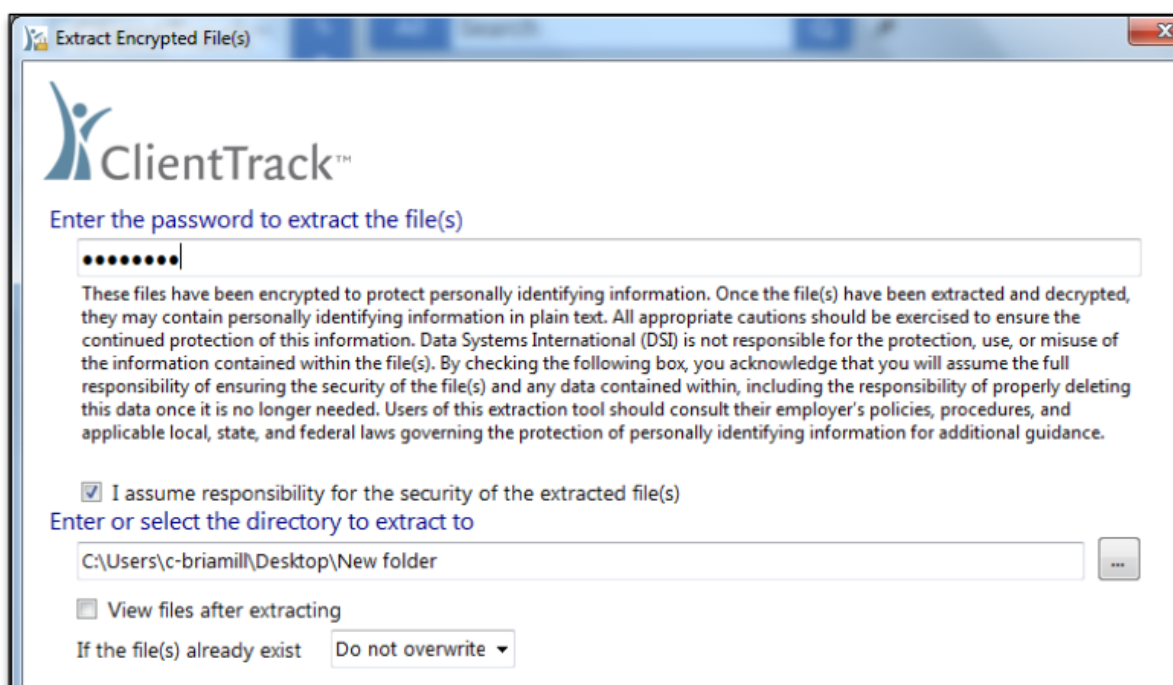
This can be useful for viewing your data during submission, when troubleshooting a data quality issue or can help provide detailed information on clients.

Retrieving an Encrypted Export: when you have encrypted your APR export, prior to downloading the final file you are required to enter in your password to complete the process. Within the Files on Server screen the system will provide you with your APR data file, but you will need to run a decryption program after you download the file (by selecting the green arrow like above).



After the program runs, you will be prompted to enter in the password for the APR files and prompted for where on your computer the files should be placed.

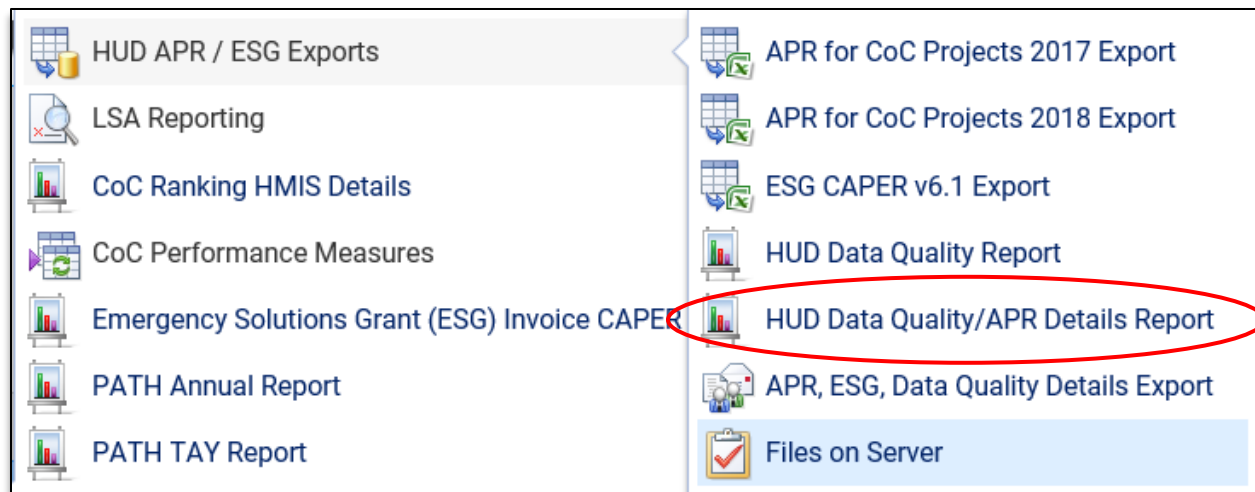
Once the form is completed, select the Extract option on the bottom and the system will provide you with the 65 CSV files that make up the CoC APR Export. You will then need to take those individual CSV files and place them into a final ZIP file for upload to the HUD SAGE system.



CoC APR Details Report:

While the CoC APR generates data for your programs it is on an aggregated or summary level, to assist with providing information on a client details level, we have provided a client details report called the **HUD Data Quality/APR Details Report**.

This details report is located within the HUD APR / ESG Exports folder and is circled below. Selecting this option will load the report screen where you can enter in your dates, organization(s) and program in which to view individual client data elements.



Since the CoC APR, ESG CAPER and the HUD Data Quality report all pull data from the same data elements this single “client details” report can be used to view per client information for each of these submissions.

*Please refer to the **HUD Data Quality/APR Details Guide** for additional details on this feature available within the PA HMIS system under the HOME -> PA HMIS Account -> System Documents area (under System Guides / Reporting).*

SAGE HMIS Reporting Repository:

From April 1st, 2017 going forward all CoC APRs are to be submitted into the HUD SAGE reporting system. Once you retrieve your electronic APR file from PA HMIS you will need to upload this file (it must be uploaded in a standard zip file format) to the SAGE system within your annual APR. Within the CoC Full APR, the HMIS Data should be generated and uploaded for APR Step 7: CSV APR Upload based on the latest HUD CoC APR Guidebook. Below are links to both the SAGE HMIS Reporting Repository as well as to the latest HUD CoC APR Guidebook to assist with the new reporting system and its APR submission steps.

[HUD CoC APR Guidebook](#)

[SAGE HMIS Reporting Repository](#)