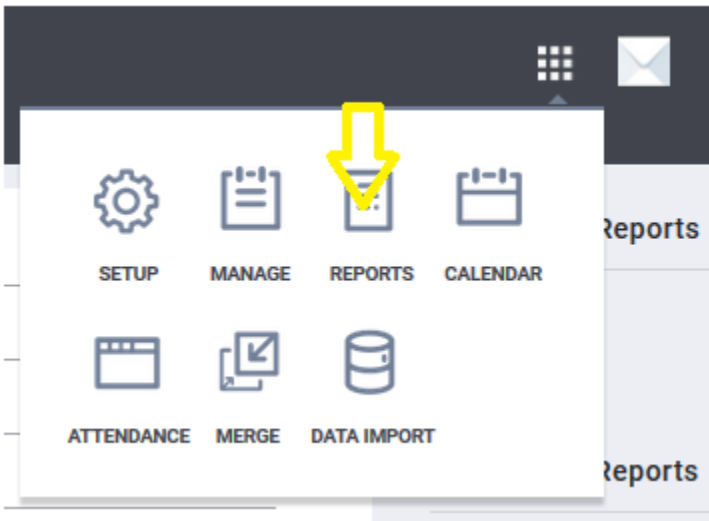


Submitting an Annual Performance Report (APR)

For a single Agency Project

Step 1: Login to ClarityHS. Select the Reports icon in the Navigation Panel.



Step 2: Select the HUD Reports folder. Run the [HUDX-227] Annual Performance Report [Oct 2017].

HUD Reports	6 report(s) ^
[HUDX-111] HUD CSV / XML Program Data Export	RUN
[HUDX-106] HUD Veteran By-Name List	BETA RUN SCHEDULE
[HUDX-225] HMIS Data Quality Report	RUN SCHEDULE
[HUDX-228] ESG CAPER [Oct 2018]	RUN SCHEDULE
[HUDX-227] Annual Performance Report [Oct 2018]	RUN SCHEDULE
[HUDX-224] PATH Annual Report [2018]	RUN SCHEDULE
Housing	4 report(s) v
Service Based Reports	14 report(s) v
Administrator Reports	16 report(s) ^
Email Reports	6 report(s) v
Program Based Reports	24 report(s) v
Agency Management	3 report(s) v
Community and Referrals	6 report(s) v
Data Quality Reports	1 report(s) v

Step 3: Choose to save the report in the CSV-Upload format.


Apply Client Location filter
 No Yes

Legacy Feature: Service Based Funding Source
Not Based on Funding Source

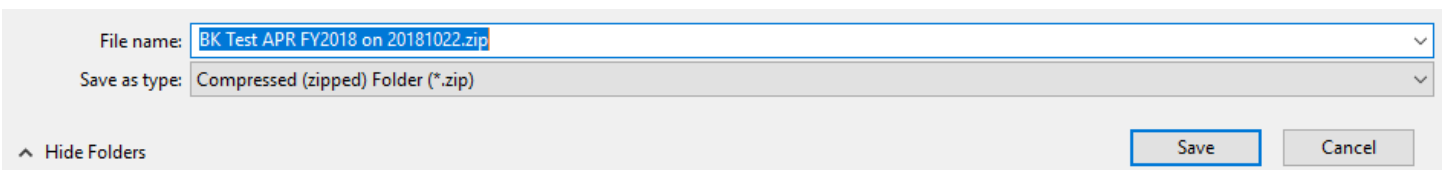
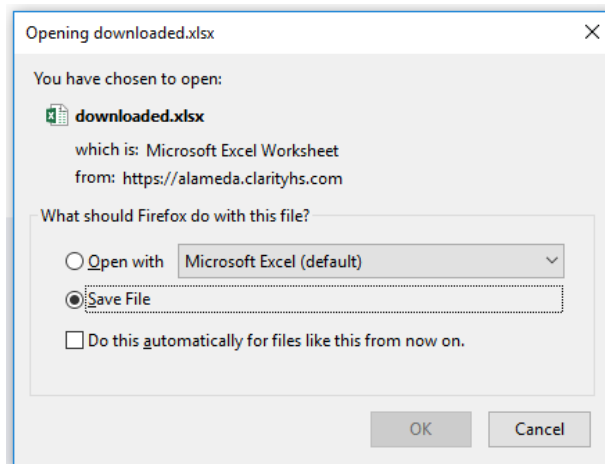
Enter the starting report date
2018/10/01

Enter the ending report date
2019/09/30

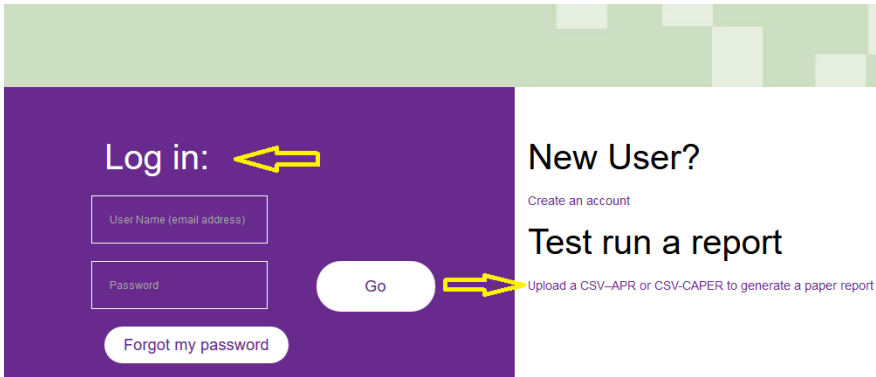
Select Report Format
 Web Page PDF Excel CSV-Details CSV-Upload



Step 4: Once the report has finished running, open the report queue and download the report to a working directory with a meaningful filename.



Step 5: Go to <https://www.sagehmis.info/> At this point you can login to upload the report or run a test to validate the report.



Step 6: Choose the CSV-APR 2018 report format at the top. Click on the **Browse** icon to select the .zip you saved from the ClarityHS APR Generation Tool. Click on **Upload and Test** or **Upload**, depending on whether you logged in or are just testing.

Please select a report that you wish to test from the dropdown list below:



Test a CSV-APR 2018

Sage requires a CSV-APR 2018 generated by your HMIS (or comparable data base for DV providers) in a .zip file, to be uploaded to the system. Follow the steps below to test your CSV-APR file and/or to create a printable version of your CSV-APR 2018.

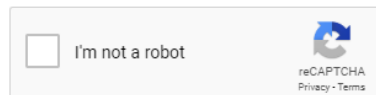
1. Download the CSV-APR from your HMIS or comparable database and save it to your computer. Remember where you place it – so you can find it.
2. Click the browse button below. Your computer's file directory will appear. Find the CSV-APR Report you saved and double click on it.
3. Check the box next to "I am not a Robot" and complete the verification steps if necessary.
4. Click on "Upload and Test" button to upload the file from your computer to Sage.
5. A results message will show:

If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.

If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.

You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.

6. If you want to test another CSV, repeat the process outlined above.



If you have followed these steps you will get this message:

Results

✓ The upload has passed all validations.