

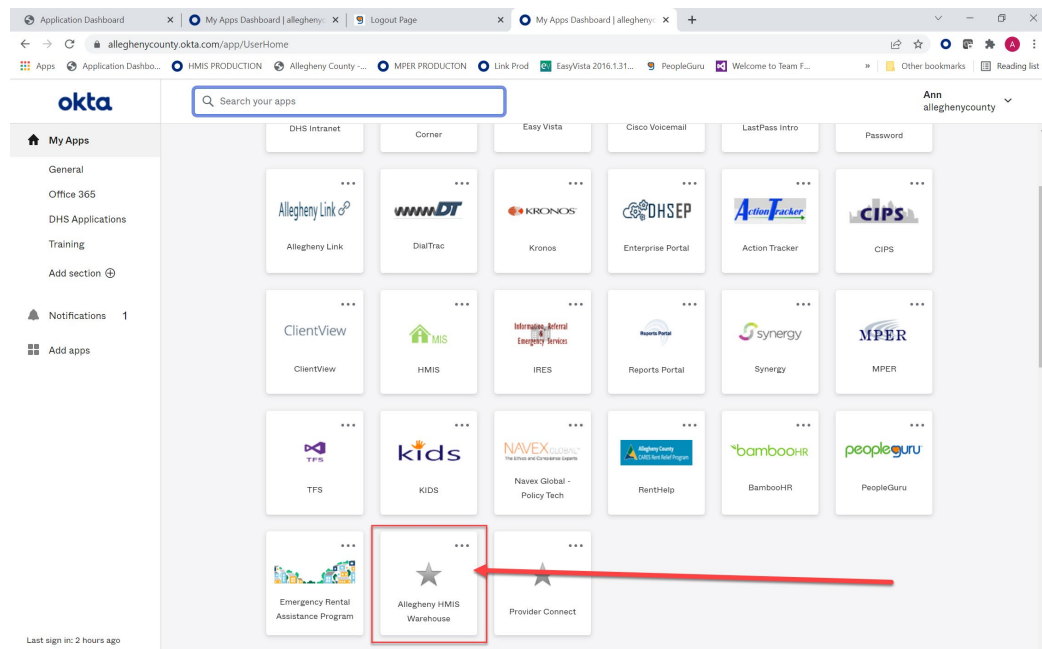


Open Path HMIS Reporting – Generating an APR

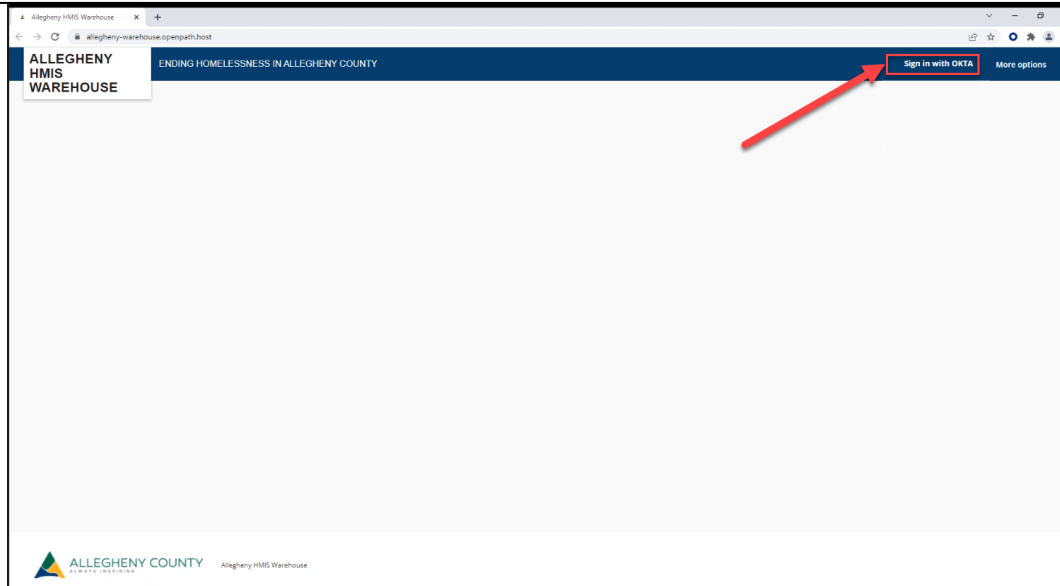
This job aid is for the Open Path software used for HMIS reporting. It will walk the user step by step through how to generate an Annual Performance Report (APR) report and how to search for a client.

The company name who developed the reporting software is *Green River*, the software is named *Open Path*, and on the OKTA home screen, the chicklet to access the reporting software is *Allegheny HMIS Warehouse*. You may hear any of these names used to refer to the same reporting system.

Accessing Open Path via OKTA



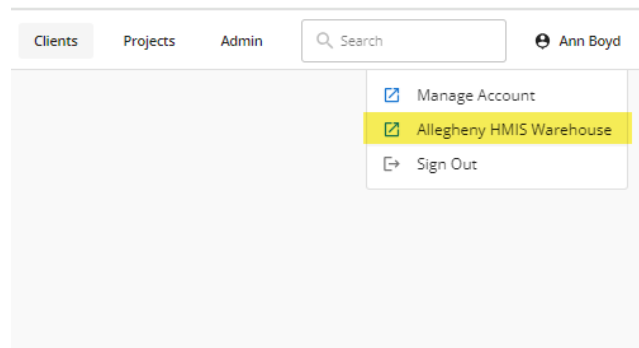
Log into OKTA and you will see the chicklet (box) for Allegheny HMIS Warehouse. This is the Open PATH HMIS reporting system. Click the Allegheny HMIS Warehouse.



The Allegheny HMIS Warehouse will open up. You will need to select **Sign in with OKTA** on the upper right side of the screen and sign in.

How to access Open Path via HMIS

Log into HMIS and you can hover over your name in the top right and in the dropdown click Allegheny HMIS Warehouse (also known as Open Path, our HMIS reporting platform)



Once you click it, you'll be prompted to sign in via OKTA . Once you click the button and sign in, click the chevron symbol next to the **Reports** button on the top right.

In Open Path, Click the chevron symbol next to the Reports button on the top right, and under HUD Reports select the HMIS Data Quality Report.



How to Generate an APR

In Open Path, Click the chevron symbol next to the Reports button on the top right, and under HUD Reports select the Annual Performance Report.

The screenshot shows the 'ALLEGHENY HMIS WAREHOUSE' interface. The main header is 'ENDING HOMELESSNESS IN ALLEGHENY COUNTY'. On the left, there's a 'Clients' section with a search bar and buttons for 'Search', 'Filter', and 'Sort'. On the right, a sidebar menu is open, showing 'Reports' with a dropdown arrow. Under 'HUD Reports', the 'Annual Performance Report' is highlighted with a red box. Other options in the menu include 'Warehouse Reports', 'Consolidated Annual Performance and Evaluation Report', 'Coordinated Entry Annual Performance Report', 'MIS Data Quality Report', 'Housing Inventory Count', 'Longitudinal System Analysis', 'Annual PATH Report', 'Point in Time Count', and 'System Performance Measures'.

The screenshot shows the 'ALLEGHENY HMIS WAREHOUSE' interface. The main header is 'ENDING HOMELESSNESS IN ALLEGHENY COUNTY'. On the left, there's a 'HUD Reports' section with a list of reports. The 'Annual Performance Report' is highlighted with a red box and a red arrow. Below it, there's a 'Generate New Full APR' button, also highlighted with a red box and a red arrow. The main content area shows the 'Annual Performance Report' details, including a description of the APR and a table of questions. The table has columns for 'Question', 'Last Run', and 'Status'. The questions listed are: Question 4 (HMIS Information), Question 5 (Report Validations), Question 6 (Data Quality), Question 7 (Persons Served), Question 8 (Households Served), Question 9 (Contacts and Engagements), Question 10 (Gender), and Question 11 (not fully visible).



Under the HUD Reports section on the left, select Annual Performance Report; then select **Generate New Full APR.**

ALLEGHENY HMIS WAREHOUSE ENDING HOMELESSNESS IN ALLEGHENY COUNTY

Annual Performance Report

Required Options

Start Date: Oct 1, 2020 End Date: Sep 30, 2021 Report Year: APR FY 2022 CoC Codes: Pittsburgh, McKeesport, Penn Hills/Allegheny County

Projects to Include

Please note, the following options are additive. If you choose a single project and a project type, the report will run for all projects in the project type and the chosen project. If you choose a data source and project type, the report will run for all projects in the chosen data source and chosen project type.

Projects: Choose Projects Data Sources: Choose Data Sources No Projects Included

Project Types: Choose Project Types Project Groups: Choose Project Groups

Limits

Sub population: All Clients Age ranges: Any Age Limit to heads of household: ☐ Genders: Any Gender Races: Any Race Ethnicities: Any Ethnicity

Under the Required Options: Select the date range you wish to run the report for. The report year will default to the current fiscal year and the CoC code will default to PA-600 (Pittsburgh, McKeesport, Penn Hills/Allegheny County).

ALLEGHENY HMIS WAREHOUSE ENDING HOMELESSNESS IN ALLEGHENY COUNTY

Annual Performance Report

Required Options

Start Date: Oct 1, 2020 End Date: Sep 30, 2021 Report Year: APR FY 2022 CoC Codes: Pittsburgh, McKeesport, Penn Hills/Allegheny County

Projects to Include

Please note, the following options are additive. If you choose a single project and a project type, the report will run for all projects in the project type and the chosen project. If you choose a data source and project type, the report will run for all projects in the chosen data source and chosen project type.

Projects: Choose Projects Data Sources: Choose Data Sources No Projects Included

Project Types: Choose Project Types Project Groups: Choose Project Groups

Limits

Sub population: All Clients Age ranges: Any Age Limit to heads of household: ☐ Genders: Any Gender Races: Any Race Ethnicities: Any Ethnicity

You can use the calendar function to select the date range or type in the dates.



Under Projects to Include, select which programs/projects to include. You can select one program or multiple. You can also run the APR by project type to pull in all RRHs or PSH programs run by the agency.

ALLEGHENY HMIS WAREHOUSE ENDING HOMELESSNESS IN ALLEGHENY COUNTY

Annual Performance Report

Required Options

Start Date: Oct 1, 2020 End Date: Sep 30, 2021 Report Year: APR FY 2022 CoC Codes: Pittsburgh, McKeesport, Penn Hills/Allegheny County

Projects to Include

Please note, the following options are additive. If you choose a single project and a project type, the report will run for all projects in the project type and the chosen project. If you choose a data source and project type, the report will run for all projects in the chosen data source and chosen project type.

Projects: Select none Data Sources: Select all

Project Types: Select all Project Groups: Select all

Limits

Sub population: All Clients Age ranges: Any Age Limit to heads of household: ☐

Genders: Any Gender Races: Any Race Ethnicities: Any Ethnicity

1 Project Included

When a project/s has been selected, it will appear on the right hand side.

Limits

Sub population: All Clients Age ranges: Any Age Limit to heads of household: ☐

Genders: Any Gender Races: Any Race Ethnicities: Any Ethnicity

Queue Report

The Limits section allows the user to focus on data by different populations served: sub-populations, age, gender, race, ethnicity, and by heads of household only. The Limits section is optional.



allegheny-warehouse.openpath.host/hud_reports/aprs/new

Annual Performance Report

Required Options

Start Date *
Oct 1, 2020

End Date *
Sep 30, 2021

Report Year
APR FY 2022

CoC Codes *
Select none
Pittsburgh, McKeesport, Penn Hills/Allegheny Count
PA-600

Projects to Include

Please note, the following options are additive. If you choose a single project and a project type, the report will run for all projects in the project type and the chosen project. If you choose a data source and project type, the report will run for all projects in the chosen data source and chosen project type.

Projects
Select none

Data Sources
Choose Data Sources

Project Types
Select all
Choose Project Types

Project Groups
Select all
Choose Project Groups

1 Project Included

Limits

Sub population
All Clients

Age ranges
Select all
Any Age

☐ Limit to heads of household

Genders
Select all
Any Gender

Races
Select all
Any Race

Ethnicities
Select all
Any Ethnicity

Queue Report

Click the **Queue Report** to run the APR report



ALLEGHENY HMIS WAREHOUSE

ENDING HOMELESSNESS IN ALLEGHENY COUNTY

APR Reports

Annual Performance Report

Generate New Full APR

APR FY 2020 APR FY 2022

Filter

Reports

Status	Limits	Included Questions	Delete
Queued to start Run by:	Report Range: Oct 1, 2020 - Sep 30, 2021 CoCs: PA-600 Household Type: All household types Projects: Sub-Population: All Clients	Question 4 Question 5 Question 6 Question 7 Question 8 Question 9 Question 10 Question 11 Question 12 Question 13 Question 14 Question 15 Question 16 Question 17 Question 18 Question 19 Question 20 Question 21 Question 22 Question 23 Question 25 Question 26 Question 27	

The report may take a few minutes to begin generating (the Status will read *Queued to start*); when it has begun generating, you'll see the status change to *Started*.

ALLEGHENY HMIS WAREHOUSE

ENDING HOMELESSNESS IN ALLEGHENY COUNTY

APR Reports

Annual Performance Report

Generate New Full APR

APR FY 2020 APR FY 2022

Filter

Reports

Status	Limits	Included Questions	Delete
Completed in 1 minute Feb 23, 2022 11:38 am Run by: Ann Boyd	Report Range: Oct 1, 2020 - Sep 30, 2021 CoCs: PA-600 Household Type: All household types Sub-Population: All Clients	Question 4 Question 5 Question 6 Question 7 Question 8 Question 9 Question 10 Question 11 Question 12 Question 13 Question 14 Question 15 Question 16 Question 17 Question 18 Question 19 Question 20 Question 21 Question 22 Question 23 Question 25 Question 26 Question 27	

When the report has generated, you will see the status change to *Completed*. You will also receive an email notification that the APR is ready. Click the blue hyperlink displaying the generation time and date to open the APR report.



On the top right, there are two buttons displaying the option to Download the report or download it as a zip file.

Clicking the **Download Report** button will allow you to select to download it as a PDF, excel or CSV, and also to view recent downloads.



While the download is occurring, you'll see a processing notice. It may take a few minutes to download.

When report is ready, click the **Download** button in the pop-up. The report will appear on the bottom left of the screen.



Annual Performance Report

APR FY 2022

Run by [redacted] at Feb 22, 2022 1:48 pm with the following options:

Report Range: Oct 1, 2020 - Sep 30, 2021

CaC: All

Household Type: All household types

Project: [redacted]

Sub Population: All Clients

DOWNLOAD PDF

Processing complete. Your file is available for download.

Download

Download Report

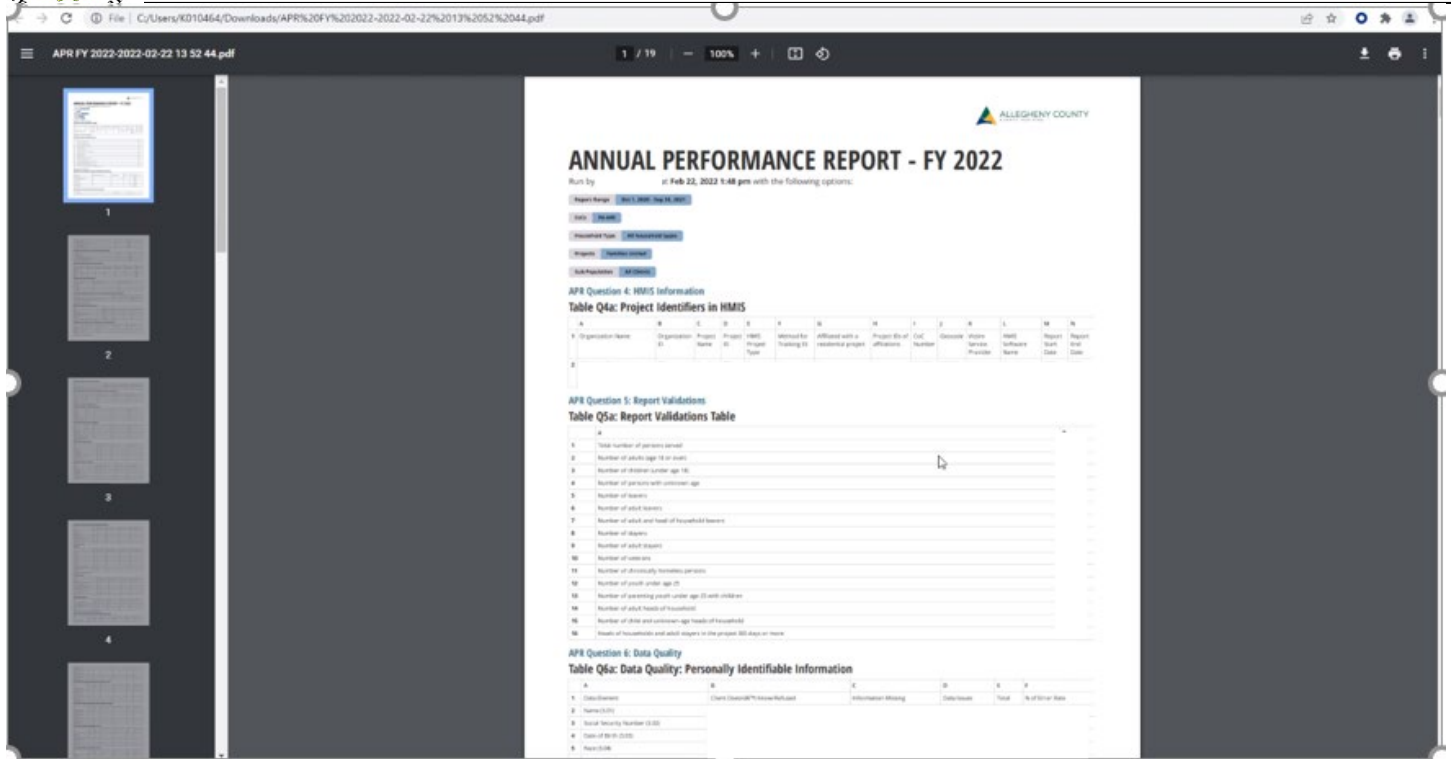
Download Zip File

Results included in this download will include the following:

- Question 4
- Question 5
- Question 6
- Question 7
- Question 8
- Question 9
- Question 10
- Question 11
- Question 12
- Question 13
- Question 14
- Question 15
- Question 16
- Question 17
- Question 18
- Question 19
- Question 20
- Question 21
- Question 22
- Question 23
- Question 24
- Question 25
- Question 26
- Question 27

APR FY 2022-2023...pdf

Click the downloaded report to open it.



The report will display the date range, program/provider, person who ran it, and other parameters selected at the top of the report with APR questions below.

Table Q6c: Data Quality: Income and Housing Data Quality

	A	B	C
1	Data Element	Error Count	% of Error Rate
2	Destination (3.12)	0	0.0000
3	Income and Sources (4.02) at Start	1	0.0222
4	Income and Sources (4.02) at Annual Assessment	1	0.0270
5	Income and Sources (4.02) at Exit	0	0.0000

Under each Question/table, clicking the number in each column will open up a drilled down report of all clients who meet that criteria.

Clicking the number in the Error Count column for any question will open up a report of all clients whose records have an error for that question.



APR Question 23 B39

Download

Client	First name	Last name	First date in program	Last date in program	Head of household	Destination	Housing assessment	Prior living situation	Head of household	Household type	Household members	Move in date	Project type	Pr
1														

Drilling down will display the client name and information, but clicking the “I” symbol under the client’s name will open up a pop-up of the client’s personal ID (MCI ID) and name to assist the user in identifying the client to make any updates in HMIS.

ALLEGHENY HMIS WAREHOUSE

ENDING HOMELESSNESS IN ALLEGHENY COUNTY

APR Question 6 Results

Download

APR Question 6 B3

Client	First name	Last name	First date in program	Last date in program	Head of household	SSN	Name quality	DOB quality	SSN quality	Race	Ethnicity	Gender	multi	Veteran status	Relationship to hoh	Enrollment CoC	Disabling condition	Income date at start	Income from any source at start	Income sources at start
1																				

HUD Reports Reports

All Assigned Clients

My Agency's Clients

Client Search

Cohorts

Data Sources

HMIS Source Data

Project Groups

In the drilled down section, the **Download** button at the top right will download all errors into an excel and drill down to show which clients have errors and for what data elements and collection points



Client Search

To access the **Client Search**, click the **Client Search** hyperlink on the right side of the screen.

Enter the client's name, SSN, or MCI ID in the Client Search section and click the *Search* button.

You will see the search results displayed below. Select a result to go into the client record.

Please Note: Search results are limited and will not display clients that were never served by the user's agency.



DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA



HOMELESS MANAGEMENT INFORMATION SYSTEM

Client ID:

PA-600

Dashboard Enrollment Details History HUD LOT

Last Seen Last Seen Location Days in Last 3 Years Enrolled in

Homeless Span Veteran Disabled

Consent

None on file

Demographics

ID	Name	SSN	Age	Gender	Race	Ethnicity	Veteran Status

Current Program Enrollments

No current enrollments

Recent Unsheltered Contacts

No current enrollments

Residential Enrollments

Showing 1 enrollment of 2 total enrollments

Project Name < Organization Name	Entry	Exit	Most Recent Day Served	Days Served	Adjusted Days	Months Served	Household Members
Totals:				1298	1298	43	

PA-600 PA-600

The Dashboard tab will show you the client's demographics, enrollments, unsheltered contacts and enrollment history with the provider.

ALLEGHENY HMIS WAREHOUSE

ENDING HOMELESSNESS IN ALLEGHENY COUNTY

Client Search

PA-600

Client ID:

Dashboard Enrollment Details History HUD LOT

Current Living Situations

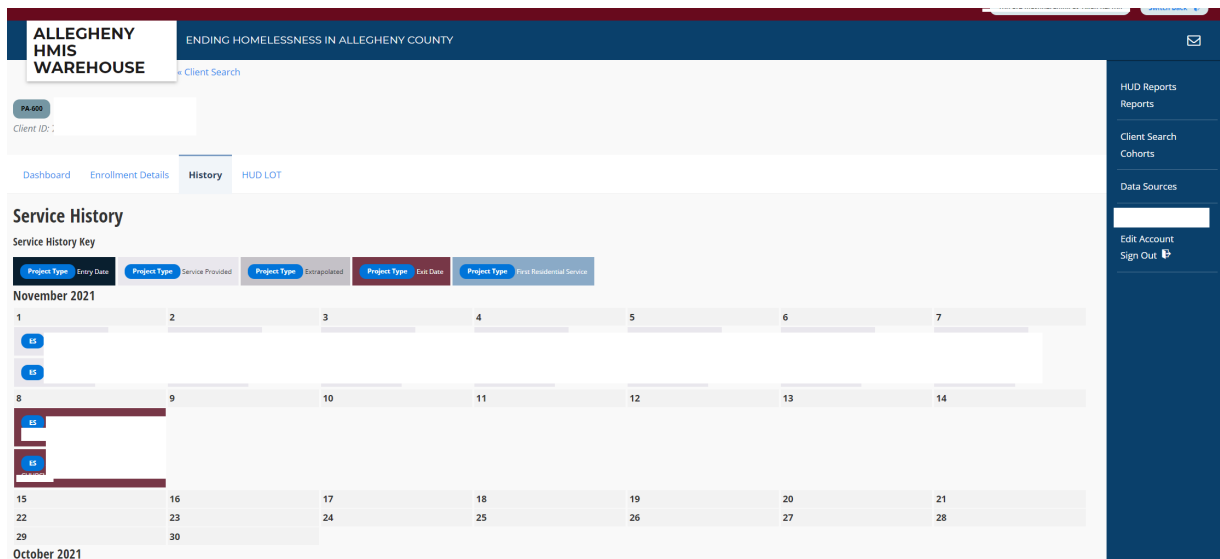
No Current Living Situations on file

Health and DV

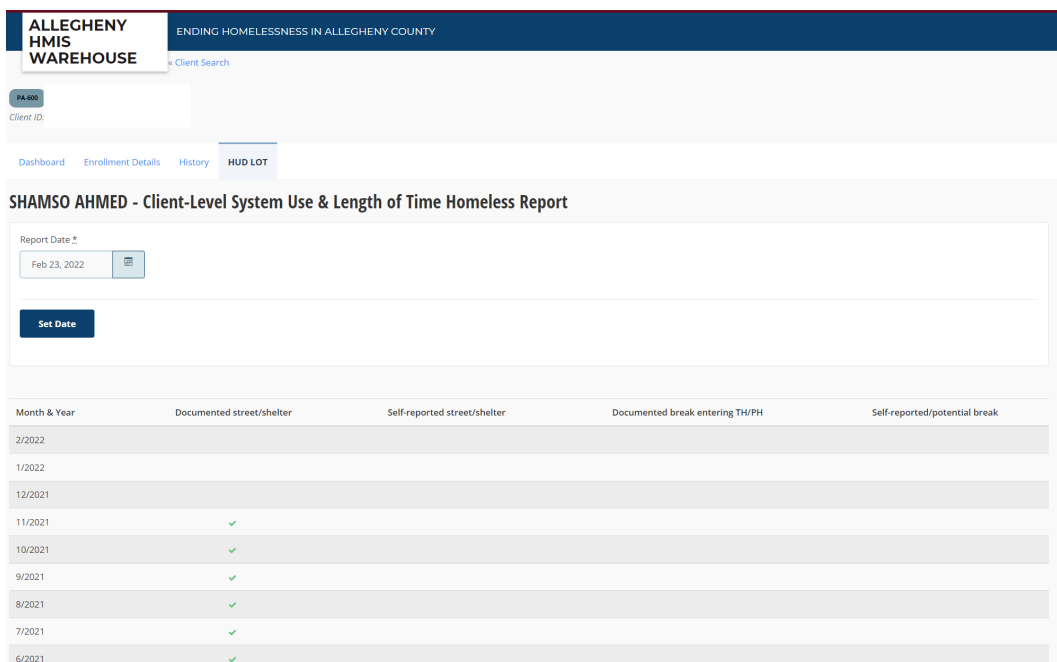
Project	Entry Date	Information Date	Domestic Violence	Currently Fleeing?	Pregnancy Status	Due Date
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						
PA-600						

Disabilities

The Enrollment Details will show the client's information at multiple data collection points during the program enrollment for Health and DV, Disabilities, Enrollment, Employment and Education, Services, Income and Benefits, Coordinated Entry assessments, and Coordinated Entry events.



The Service History tab will show the client's first involvement and exit with the program as a calendar view.



The HUD LOT Tab will display the client's system use and documented (via HMIS) length of time homeless.



For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>