# 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 APR report, generate a Data Quality 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.

Please note that the data in any report pulled reflects data as of 6 AM the current date. If changes are made in HMIS, to see the changes reflected in an Open Path report you will need to pull it the next business day
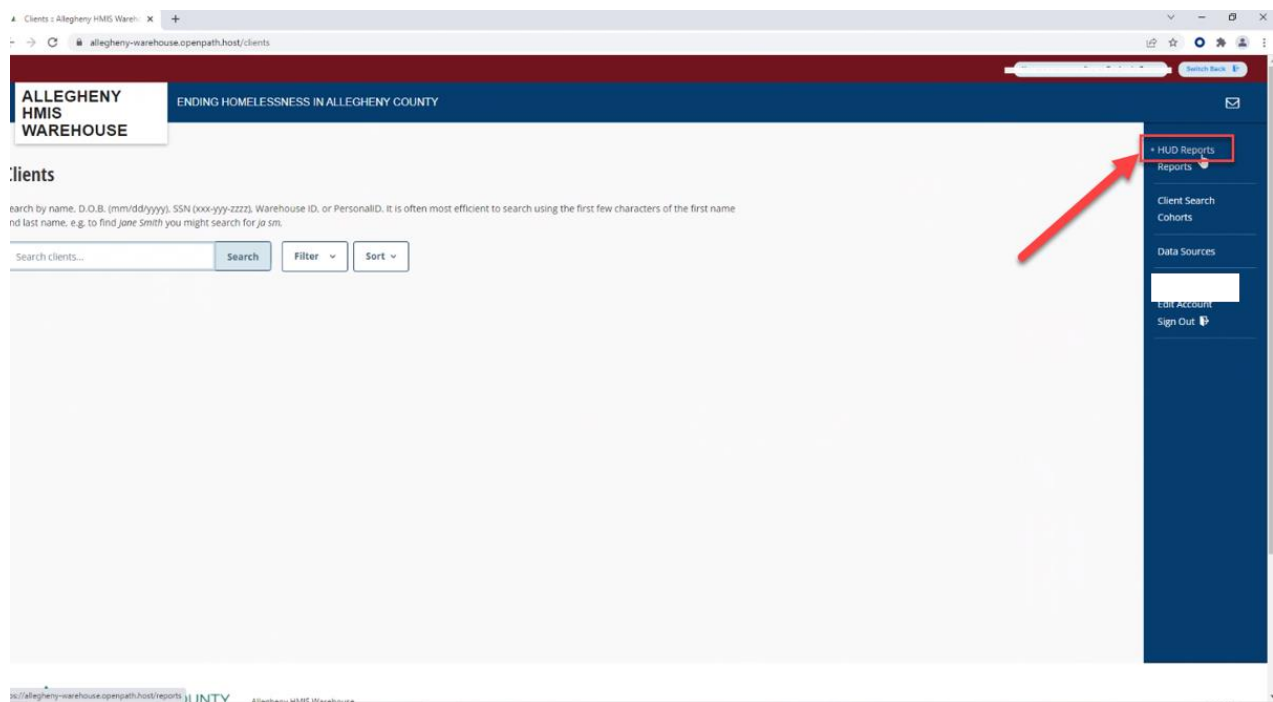
Accessing Open Path
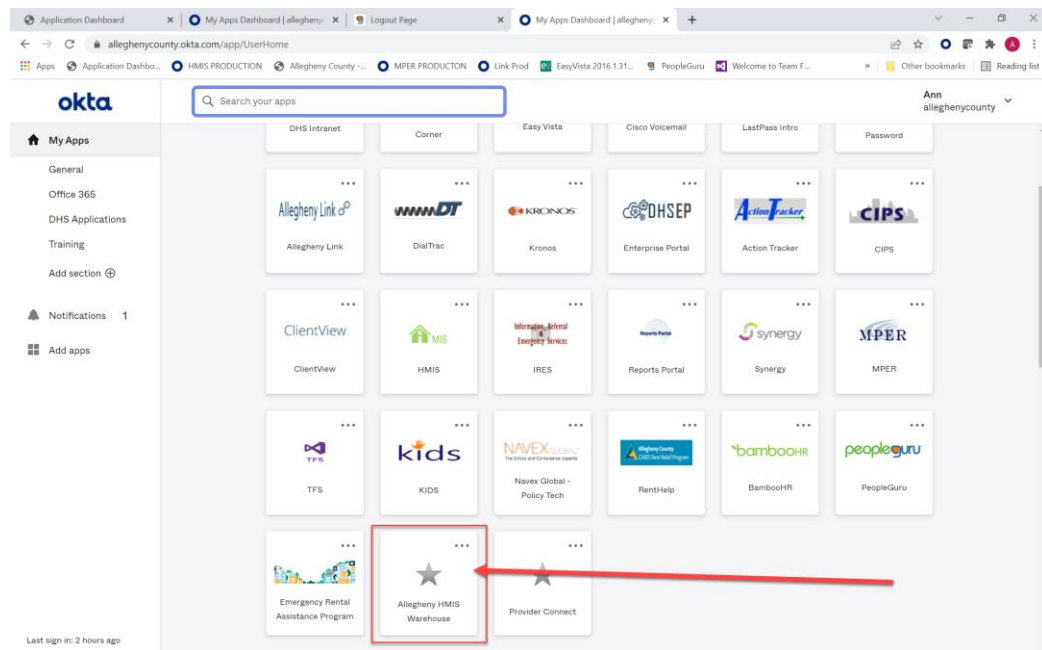
Log into OKTA and you will see the chicklet (box) for Allegheny HMIS Warehouse. This is the Open PATH HMIS reporting system. Click the Allegheny HMIS Warehouse.
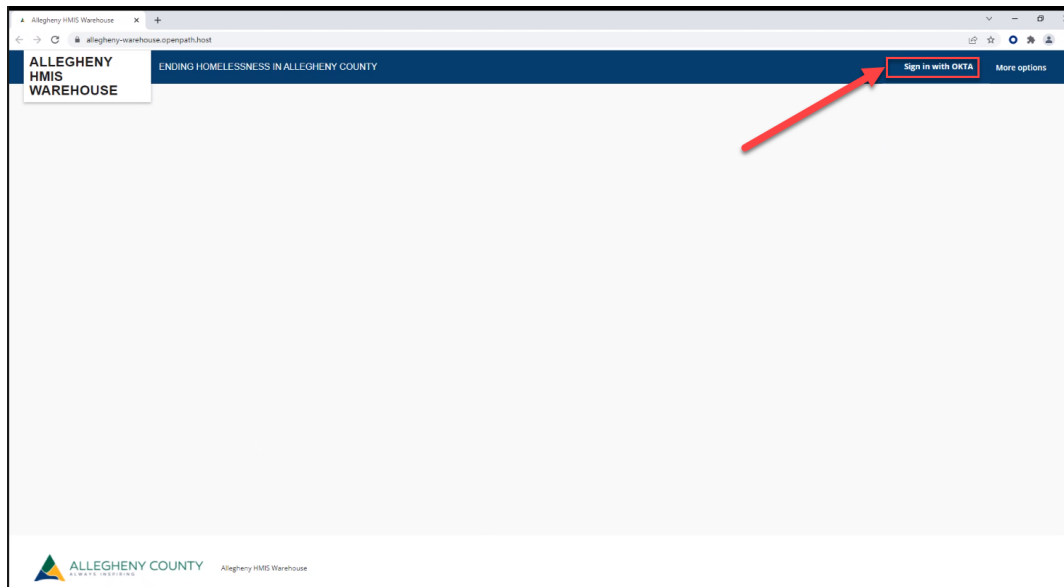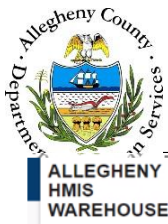
The Allegheny HMIS Warehouse will open up. You will need to select **Sign in with OKTA** on the upper right side of the screen and sign in.

How to Generate an APR

To generate an APR, click **HUD Reports** on the top right.

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

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).

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.

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

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.

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

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*.

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 is 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.

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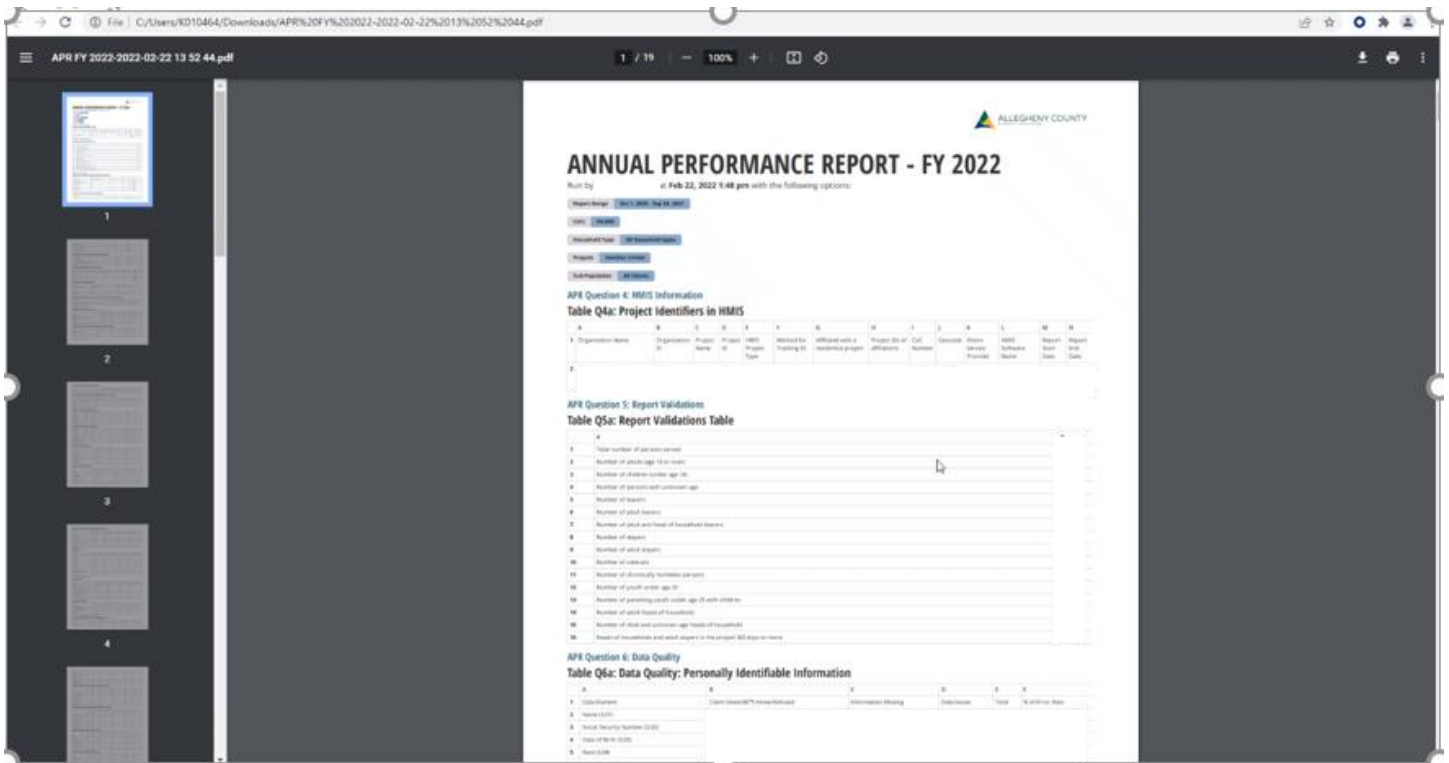
The report will display the date range, program/provider, person who ran it, and other parameters selected at the top of the report with APR questions below.

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

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.

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.

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

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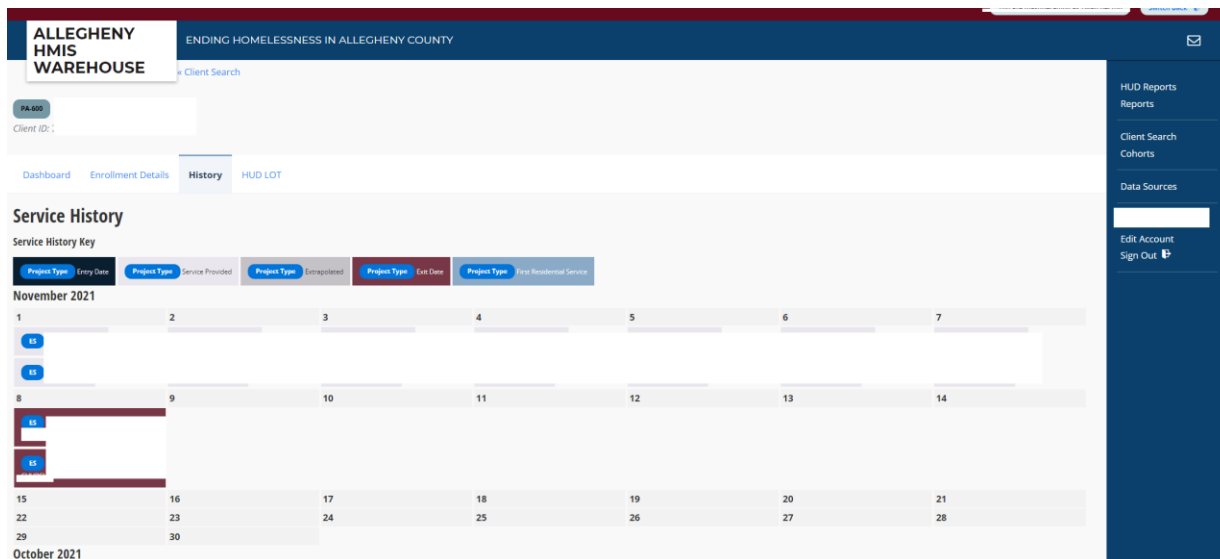
The Service History tab will show the client's first involvement and exit with the program as a calendar view.

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