



# **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.



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$\leftrightarrow$ $\rightarrow$ $\mathbf{C}$ $$ $$ allegheny-warehouse.openpath.host	e 🖈 o 🛪 🛎 :
ALLEGHENY HMIS WARELACISE	Sign in with OKTA More options
WAREHOUSE	
ALLEGHENY COUNTY Alleghery HMS 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.

Clients : Allegheny HMIS Wareh: ×						v - 0
Or allegheny-warehou						@ # <b>0 # 1</b>
						 Switch Back (F)
ALLEGHENY HMIS WAREHOUSE	ENDING HOMELESS	SNESS IN ALLE	GHENY COUNTY			Ø
lients						+ HUD Reports Reports
nd last name, e.g. to find jane Smith	you might search for <i>ja sn</i>	n.	onaliD. It is often most efficient to search	using the first few characters of the f	rst name	Client Search Cohorts Data Sources
Search clients	Search	Filter ~	Sort v			Data sources
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To generate an APR, click **HUD Reports** on the top right.



#### DEPARTMENT OF HUMAN SERVICES ALLEGHENY COUNTY, PENNSYLVANIA



HOMELESS MANAGEMENT INFORMATION SYSTEM

WAREHOUSE			
			HUD Reports Reports
HUD Reports			
Point in Time (PIT)	Annual Performance Report		Client Search Cohorts
Longitudinal System Analysis	The APR contains 24 questions, labeled 4 through 27. Each question contains one or more tables of data. Questions can be run individually below, or can be run all	together. Each report	
Housing Inventory Count (HIC)	run can be downloaded as a zip file suitable for upload to HUD by following the link in the Status column on subsequent pages.		Data Sources
Annual Performance Report	See the history of all report runs and download zip files		
Consolidated Annual Performance and Evaluation Report	Generate New Full APR		Edit Account
Coordinated Entry Annual Performance Report			Sign Out 🖡
Data Quality Report	Question Lass	t Run Status	
Annual PATH Report	Ouestion 4		
System Performance Measures	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		
tps://allegheny-warehouse.openpath.host/hud_reports/aprs/new	Question 11		
F P Type here to search		🕈 Raining now \land 🧰	🐲 🕼 di) 1:36 PM 🗔

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

ALLEGHENY	ENDING HOMELESSNESS IN ALLEGHEI	NY COUNTY					
HMIS WAREHOUSE Annual Performance R	« APR Reports						HUD Reports Reports
Required Options							Client Search Cohorts
Start Date*	End Date <u>*</u> Sep 30, 2021	10	Report Year APR FY 2022	•	CoC Codes <u>*</u> × Pittsburgh, McKeesport, Penn Hills/A	Select none	Data Sources
Projects to Include					PA-600		Edit Account Sign Out
	ns are additive. If you choose a single project a ta source and chosen project type.	ind a project type, the report will run for	all projects in the project type and the ch	osen project. If you	choose a data source and project type, the re	eport will run	
Projects	Select all	Data Sources	Select all	No Project	s Included		
Choose Projects		Choose Data Sources					
Project Types	Select all	Project Groups	Select all				
Choose Project Types		Choose Project Groups					
Limits							
Sub population		Age ranges	Select all				
All Clients	•	Any Age		Limit to heads	of household		
Genders	Select all	Races	Select all	Ethnicities		Select all	
Any Gender		Any Race	0	Any Ethnicity			<u> </u>

Under the <u>Required Options</u>: 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 Coung DEPARTMENT OF HUMAN SERVICES partme ALLEGHENY COUNTY, PENNSYLVANIA HOMELESS MANAGEMENT INFORMATION SYSTEM 0 ALLEGHENY ENDING HOMELESSNESS IN ALLEGHENY COUNTY HMIS -----October 2020 APR Reports Mo Tu We Th Fr Sa HUD Reports Su 28 29 30 5 6 7 <sup>2</sup><sup>3</sup><sub>9</sub> <sup>3</sup><sub>10</sub>ice Report Reports A 11 12 13 14 15 16 17 Client Search 18 19 20 21 22 23 24 25 26 27 28 29 30 31 End Date \* Report Year CoC Codes \* Select none Data Sources 歯 Oct 1, 2020 Sep 30. 2021 • APR FY 2022 \* Pittsburgh, McKeesport, Penn Hills/Allegheny Count Edit Accou PA-600 Sign Out 🗗 **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. ata Sources Select all No Projects Included Choose Projects Choose Data Sources oject Types Select al Project Groups Select all Choose Project Types Choose Project Groups Limits Sub population Age ranges Select all

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

Under <u>Projects to Include</u>, 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.

	Reports						HUD Repo Reports
nual Performance Rep	ort						Client Sea
equired Options							Cohorts
art Date *	End Date *		Report Year		CoC Codes *	Select none	Data Sour
Oct 1, 2020	Sep 30, 2021		APR FY 2022		* Pittsburgh, McKeesport, Per	nn Hills/Allegheny Count	
Projects to Include					PA-600		Benjamin Edit Accou Sign Out
		and a project type, the report will run for	all projects in the project type and the chose	en project. If you cho	oose a data source and project ty	pe. the report will run	
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for all projects in the chosen data so rojects	urce and chosen project type. Select none	Data Sources Choose Data Sources	Select all			pe, the report will run	
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for all projects in the chosen data so rojects roject Types Choose Project Types imits ub population	Select none Select all	Data Sources Choose Data Sources Project Groups Choose Project Groups Age ranges	Select all Select all Select all Select all	1 Project Incl	uded	pe, the report will run	

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



#### DEPARTMENT OF HUMAN SERVICES Allegheny County, Pennsylvania



HOMELESS MANAGEMENT INFORMATION SYSTEM

Limits					
Sub population		Age ranges Select a	all		
All Clients	•	Any Age		Limit to heads of household	
Genders	Select all	Races Select a	all	Ethnicities	Select all
Any Gender		Any Race		Any Ethnicity	
			_		
Queue Report					

The <u>Limits</u> 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.

Required Options						Client Searc Cohorts
tart Date *	End Date _		Report Year		CoC Codes * Select none	Data Source
Oct 1, 2020	Sep 30, 2021	-	APR FY 2022	÷	+ Pittsburgh, McKeesport, Penn Hills/Allegheny Count	Local Source
rojects to Include					PN-600	Edit Account Sign Out
Please note, the following options are addition for all projects in the chosen data source and		and a project type, the report will ru	n for all projects in the project type and the cho	osen project. If you cl	oose a data source and project type, the report will run	
rojects	Select none	Data Sources	Seject all	1 Project Inc	luded	
		Choose Data Sources				
oject Types	Select all	Project Groups	Select all	78		
Choose Project Types		Choose Project Groups				
imits		Age ranges	Select all			
		- de l'andres				
		Arry Age		Limit to heads of	household	
imits ub population All Clients enders	• Select al		Select all	Ethnicities	household Select all	

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





ALLEGHENY HMIS	ENDING HOMELESSNESS IN ALLEGHENY COUNTY		
WAREHOUSE nnual Performance	* APR Reports Report	Generate New Full APR	IUD Reports reports lient Search rohorts
ports		Filter 🗸	dit Account
Status Queued to start Run by:	Limits Report Range Cost 1, 2000 - Sep 91, 2001 Cot's PAG00 Recorded Type All Inscalated types Projects Exclusivestime All Cancer	Included Questions Delete Question 4 Question 5 Question 6 Question 7 Question 13 Question 9 Question 10 Question 12 Question 13 Question 14 Question 15 Question 17 Question 18 Question 19 Question 20 Question 21 Question 22 Question 22 Question 23 Question 26 Question 27	ign Out 🖡
	Þ		

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		
nnual Performance	PAPR Reports		IUD Reports eports
APR FY 2020 APR FY 2022			II Assigned Client ly Agency's Client lient Search iohorts
2 3 Next→ Last⇒ ports	Limits		lata Sources IMIS Source Data roject Groups
Completed in 1 minute Feb 23, 2022 11:38 am	Report Range Oct 1, 2020 - Sep 30, 2021		dmin Dashboard
Run by: Ann Boyd	CuCa PA.600 Mousehold Type: All Insurshold types Sub-Population All Clients	Question 14         Question 15         Question 16         Question 17         Question 18         E	Inn Boyd ecure Files dit Account ign Out 🕞
	•	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.





ALLEGHENY HMIS	ENDING HOMELESSNESS IN ALLEGHENY COUNTY	
WAREHOUSE	« Annual Performance Report	HUD Repo
PR FY 2022		Client Cohor
n by at Feb 2	2, 2022 1:48 pm with the following options:	Data S
Report Range Det 1, 2020 - Sep 30, 202 CoCs PA-600		Edit Ad Sign O
Household Type All household types		
Sub-Population All Clients	Ludi incluste the following:	
	Vuestion 6 Vuestion 7 Vuestion 8 Vuestion 9 Vuestion 10 Vuestion 11 Vuestion 12 Vuestion 13 Vuestion 14 Vuestion 15 Vuestion 16	

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

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VAREHOUSE		HUD Reports Reports
R FY 2022	- Dewnload Report	Client Search Cohorts
evert Kange DAX 2000 Aug B Ko DAXED An even of Type Af Ansanbiat type An equivation At Dawn with included in this downlo Question 4 Question 4 Question 4	Recent Downloads	Data Sources Edit Account Sign Out P

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.

ALLEGHENY	ENDING HOMELESSNESS IN ALLEGHENY COUNTY		
WAREHOUSE	× Avesial Performance Report		HUD Reports
nual Performance	Report		Reports
PR FY 2022		A Download Report	Client Search Cohorts
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✓ Question 17	12 🖉 Querriere 13 🖉 Querriere 22 🖉 Querriere 22 🖉 Querriere 22 🖉 Querriere 23 🖉 Querriere 25 🖉 Querriere 25 🖉 Querriere 26	1	

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





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ALLEGHENY HMIS WAREHOUSE	HENY COUNTY		Ø
Annual Performance Report			HL/D Reports
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APR FY 2022			Download Report
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Operation 1     Operation 2     Operation 3     Operation 3     Operation 3     Operation 3     Operation 3     Operation 3     Operation 4     Operation			(Decemina Sta
APR #v 2022-2022_pdf A			Show all S

Click the downloaded report to open it.





C D Frie C/Users/K010464/Downloads/APR%20FV%202022-2022-02-22%2013%2052%2044.pd APR FY 2022-2022-02-22 13 52 44.pdf 1 / 19 | - 100% + | 0 0 . ٠ ALLEGHENY COUNTY **ANNUAL PERFORMANCE REPORT - FY 2022** In TAXABLE -In Contract (and a lot of the lot Table Q4a: Project Identifiers in HMIS on C. Basanti Validi ble Q5a: Report Validations Table 5 ion & Data Osuli Table Q6a: Data Quality: Personally Identifiable Info

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	В	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 (	VPR Question 23 B39						Download					
Client			date in	Last date in program			Housing assessment	Head of household	Household type	Household members	Project type	Pr tra m
(i)												

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.

ALLEGHENY HMIS WAREHOUSE	
Clients	HUD Reports Reports
Search by name, D. O. B. (mmiddlyyyy), SSN (xxx-yyy-zzz), Warehouse ID, or PersonalID. It is often most efficient to search using the first few characters of the first name and last name, e.g. to find Jone Smith you might search for Jo am.	Client Search Cohorts
Search clients Search Filter v Sort v	Data Sources
Ca	Benjamin Bonus Edit Account Sign Out 🗗

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

ALLEGHENY HMIS ENDING HOMELESSNESS IN ALLEGHENY COUNTY		
WAREHOUSE Clients		HUD Reports Reports
Search by name, D.O.B. (mm/dd/yyy), SSN (xxyy)-zzz), Warehouse ID, or PersonalID. It is often most efficient to search using the first few characters of the first name and last name, e.g. to find Jone Smith you might search for J am.		Client Search Cohorts
Search Filter V Sort V		Data Sources
Displaying 1 client Currently sorted by: Lass name A-Z		Benjamin Bonus Edit Account
Client name here SSN Year of Birth (age)		Sign Out 🗗
	View	

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

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





Client ID:	·								Client Search
									Cohorts
Dashboard Enro	rollment Details History HUD LOT								Data Sources
Last Seen		Last Seen Location		Days in La	st 3 Years		Enrolled in		Edit Account Sign Out 🗗
Homeless Span			Veteran				Disabled		
Consent <ul> <li>None on file</li> </ul>									
Demographics	Name SSN	Age Gende	r Race		Ethnicity			Veteran Status	
Current Program Er	Enrollments								
Current Program Er									
No current enrollmer	ents								
No current enrollmer	ents ed Contacts								
No current enrollmer	ents ed Contacts ents								
Recent Unsheltered	ents ed Contacts ents ments							Showing 1 enrollment of 2 total enrollments	
No current enrollmer Recent Unsheltered No current enrollmer	ents ed Contacts ents		Entry	Exit	Most Recent Day Served Totals:	Days Served 1298	Adjusted Days 1298	Showing 1 enrollment of 2 total enrollments Months Served Household Members 43	

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

ALLEGHENY HMIS	ENDING HOMELESSNESS IN ALLEGHENY COUNTY		
WAREHOUSE PA-000	« Client Search		HUD Reports Reports
Client ID:			Client Search Cohorts
Dashboard Enrollment Details	History HUD LOT		Data Sources
Current Living Situations			Edit Account
No Current Living Situations on file			Sign Out P
Health and DV			
Project	Entry Date Information Date Domestic Violer	ce Currently Fleeing? Pregnancy Status	Due Date
98.600 98.600 98.600 98.600 98.600 98.600 98.600 98.600 98.600 98.600			
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.

							Summer Sole &
ALLEGHENY HMIS	ENDINGTIONEE	ESSNESS IN ALLEGHENY COU	NTY				
WAREHOUS	« Client Search						
							HUD Reports
PA-600							Reports
Client ID: 2							Client Search
							Cohorts
Dashboard Enrollmer	nt Details History HUD LO	т					
							Data Sources
Service History							
							Edit Account
Service History Key							Sign Out
Project Type Entry Date	Project Type Service Provided Project	ct Type Extrapolated Project Type Exit	Date Project Type First Residential Service				
November 2021							
1	2	3	4	5	6	7	
13							
_							
8	9	10	11	12	13	14	
<b>B</b>							
B							
	_						
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30						
October 2021							

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

ALLEGHENY HMIS	ENDING HOMELESSNESS IN	N ALLEGHENY COUNTY		
WAREHOUSE	« Client Search			
PA.600 Client ID:				
Dashboard Enrollment Details	History HUD LOT			
SHAMSO AHMED - Cli	ent-Level System Use	& Length of Time Homeless Report		
Report Date <u>*</u> Feb 23, 2022				
Month & Year	Documented street/shelter	Self-reported street/shelter	Documented break entering TH/PH	Self-reported/potential break
2/2022				
1/2022				
12/2021				
11/2021	~			
10/2021	¥			
9/2021	~			
8/2021	¥			
7/2021	×			
6/2021	¥			

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 <u>ServiceDesk@AlleghenyCounty.US</u> or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

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

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