

[HUDX-226] Annual Performance Report [2017]

Preparing for APR

1. **Register for a Sage account.** Go to www.sagehmis.info and register for an account. Your account will need to be approved by the CoC, Nick Mondau at Commerce, so do not wait until the last minute to create your account. You can [view an instructional video here](#).
2. **Run the data quality report(s).** Do this for each program included in your grant. You can run the Details report in Excel and then the Regular report in Web Format to check between the two and make edits.
 - o Go to Run Reports > HUD Reports > [HUDX-225] HMIS Data Quality Report.
 - o Select “Excel” for Details mode and then run again selecting Regular mode in “Web format.”
 - o Review results.
 - o Make corrections to data as needed.
 - o Rerun as needed as you make edits to data

The screenshot shows a web form for configuring a report. It includes several sections: 'Choose Program Type(s)' with a scrollable list of options like 'All', 'Emergency Shelter', and 'PH - Permanent Supportive Housing'; 'Choose Program Status' with a dropdown menu; 'Choose Program(s)' with a large empty text area; 'Enter the starting report date' and 'Enter the ending report date' with date pickers; 'Choose Report Mode' with a dropdown menu set to 'Regular Report'; and 'Choose Report Format' with radio buttons for 'Web Page', 'PDF', and 'Excel'. The 'Regular Report' dropdown and the 'Web Page' radio button are circled in red. An 'OK' button is located at the bottom right of the form.

3. **Run the draft APR.**
 - o Go to Run Reports > HUD Reports > [HUDX-226] Annual Performance Report [2017].
 - o Select “Web format”.
 - o Review report.
 - o Make corrections to data as needed.
 - o Rerun as needed.

Running APR

Once you are satisfied with the draft...

1. Run the final APR.

- Go to Run Reports > HUD Reports > **[HUDX-226] Annual Performance Report [2017]**.
- Select “Excel format”.
- DO NOT modify the contents of the Excel file.
- If desired, change the name of the file, leaving the “.xls” extension.

2. Convert to CSV.

- Go to the [APR/ESG CAPER - CSV Extract Tool](#).
- For Processing Report, select “APR 2017”.
- For Process Method, select “Download ZIP File”.
- Toward the bottom of the form, choose *Select File*.
- Select *Process*.

The file will automatically download to your machine. Check your Downloads folder. Rename the file as needed, but DO NOT MODIFY the contents of the file.

Submitting APR

1. **Return to the Sage Repository.** Go to www.sagehmis.info and sign in to your account.
2. **Upload the file.** Follow directions for uploading.
3. **Check for errors.** After uploading, you will immediately get feedback if your report has errors.
4. **Repeat as necessary.**