Reporting in Cleveland/Cuyahoga HMIS

The purpose of this document is to outline step-by-step instructions on running commonly used, canned reports in Cleveland/Cuyahoga's HMIS instance, Clarity Human Services (provided by Bitfocus, Inc.). Note that the instructions below represent general steps for the most common uses of each report and can be edited to meet different reporting needs.

Navigating to REPORTS

1. In the top right corner of the home screen, click the menu button: ▦
2. Click REPORTS
3. All reports covered in this document can be found in the HUD REPORTS dropdown list

[HUDX-227] Annual Performance Report [FY2023]

1. Switch Access Agency(-ies) = choose the appropriate agency(-ies)
2. CoC Filter Category = "Agency CoC"
3. CoC = "OH-502"
4. Project Type(s) = choose the appropriate project type
5. Program Status = choose to see only active projects, only inactive projects, or all projects
6. Program(s) = choose the appropriate program(s); to see all programs within a certain project type, select "All".
7. Apply Client Location Filter = "No"
8. Funding Criteria = "Not Based on Funding Source"
9. Report Date Range = enter date range using calendar buttons
10. Report Output Format = select option based on what is needed
    a. Web Page = opens report in web browser; includes drilldown hyperlinks that are not included on any other output format
    b. PDF = opens report in PDF (browser or Adobe)
    c. Excel = opens report in Excel spreadsheet
    d. CSV-Details = opens report in series of folders and spreadsheets that detail certain items on the APR
    e. CSV-Upload = opens report in series of folders and spreadsheets meant for uploading into repositories
11. Drilldown Output Format = select option based on what is needed; this is only available if "Web Page" is selected for the report output format above
    a. Web Page = when a number is clicked within the report, the list of clients who were counted in that item will come up as another tab in the web browser
    b. CSV = when an number is clicked within the report, the list of clients who were counted in that item will be downloaded into an Excel spreadsheet

12. Click SUBMIT
13. Once the report has completed running, click the report queue in the upper right corner to OPEN

[HUDX-111] HUD CSV/XML Program

1. Switch Access Agency(-ies) = choose the appropriate agency(-ies)
2. CoC Filter Category = "Agency CoC"
3. CoC = "OH-502"
4. Project Type(s) = choose the appropriate project type
5. Program Status = choose to see only active projects, only inactive projects, or all projects
6. Program(s) = choose the appropriate program(s); to see all programs within a certain project type, select "All".
7. Apply Client Location Filter = "No"
8. PIT Date = enter the year's PIT Date or **can leave blank**
9. Report Date Range = enter date range using calendar buttons
10. Version = 2022.1.3 (automatically selected)
11. Source Type = "Continuum-operated HMIS"
12. Encrypt Identifying Data = selecting NO will show all client personally identifiable information (PII); selecting YES will encrypt all PII (**REQUIRED by most repository uploads**)
13. Include Deleted Data = "No"
14. Include Service Item ID = "No"
15. Include Assessment Screen ID = "No"
16. Include Custom Services = "No"
17. Report Output Format = select option based on what is needed
    a. CSV = opens report in series of folders and spreadsheets (**REQUIRED for most repository uploads**)
    b. XML = opens report in markup language
18. Click SUBMIT
19. Once the report has completed running, click the report queue in the upper right corner to OPEN

[HUDX-228] ESG CAPER [FY2023]

1. Switch Access Agency(-ies) = choose the appropriate agency(-ies)
2. CoC Filter Category = "Agency CoC"
3. CoC = "OH-502"
4. Project Type(s) = choose the appropriate project type
5. Program Status = choose to see only active projects, only inactive projects, or all projects
6. Program(s) = choose the appropriate program(s); to see all programs within a certain project type, select "All".
7. Apply Client Location Filter = "No"
8. Federal Funding Source Criteria = "Not Based on Federal Funding Source"
9. Funding Criteria = "Not Based on Funding Source"
10. Report Date Range = enter date range using calendar buttons
11. Report Output Format = select option based on what is needed

a. Web Page = opens report in web browser; includes drilldown hyperlinks that are not included on any other output format
b. PDF = opens report in PDF (browser or Adobe)
c. Excel = opens report in Excel spreadsheet
d. CSV-Upload = opens report in series of folders and spreadsheets meant for uploading into repositories

12. Drilldown Output Format = select option based on what is needed; this is only available if "Web Page" is selected for the report output format above
    a. Web Page = when a number is clicked within the report, the list of clients who were counted in that item will come up as another tab in the web browser
    b. PDF = when a number is clicked within the report, the list of clients who were counted in that item will be downloaded into a PDF
    c. CSV = when an number is clicked within the report, the list of clients who were counted in that item will be downloaded into an Excel spreadsheet

13. Click SUBMIT

14. Once the report has completed running, click the report queue in the upper right corner to OPEN