CoC APR Technical Notes and Training Tips

CoC APR Technical Notes

1. Report specifications require a Project Entry and Project Exit (when applicable) in order to include clients in the report. Projects recording Services, Needs or Referrals ONLY will not generate any report results.

2. The report may be run for non-HUD funded projects if desired. Please note that sections in the report populate based on Project Types so some sections may be null.

3. Night by Night shelters must use a Project Entry/Project Exit in addition to recording shelter nights via ShelterPoint or using Service Transactions with Shelter Service Codes.

4. The new CoC APR Provider report requires that all communities use the federal age of 18 to determine adult/child status. Therefore, this report does not contain an "Age for Adult" prompt.

5. Clients with a "negative age" which results from a Date of Birth that is dated in the future will cause data quality issues in the CoC APR. Each client must have a valid age to be considered appropriately for Household Type and other sections of the report.

6. All clients must have a value for "Relationship to Head of Household". The report does not use Group Id or Household Id to determine Head of Household or other relationships.

7. The CoC APR is designed to be run for a 1 year period. If the report is run for period of time that is shorter or longer than this will negatively impact the sections that calculate Annual Assessments for Income. This is related to the calculation of required Annual Assessment that occurs either + or – 30 days of the client's anniversary (Project Entry) date. Reminder: use actual Operating Year Start Date and Operating Year End date. Do not add +1 to the End Date.

8. HUD logic for counting chronically homeless clients is different for a Point in Time count versus calculation at Project Entry for a longer reporting period. The APR uses the longer reporting period logic so it is not recommended that users run the APR for single day reporting periods as this will result in an inaccurate chronically homeless count.

9. When possible, in instances where the report counts "households" vs "persons" the detail will show the client marked as Head of Household so that users can review household counts.

10. The CoC APR will work for Provider Reporting Groups. Create and select the desired Reporting Group in the Prompts. Once a selection is made, the user needs to designate the appropriate "Parent Provider" in the dropdown that appears. This provider is the provider that will populate in Question 4a with the appropriate project name, id, and other HUD standards information.

CoC APR Training Tips

1. Once you locate an error for a client, use the "Highlight Client" feature to review for other potential errors. The user can then go to a record once to make all needed corrections.

2. Question 6e checks for Timeliness of Data Entry for creation of each Project Entry and Project Exit. Back-date mode will not allow users to alter the timeliness of the transaction as the report checks for Date Created and Date Updated. If a data quality issue requires the deletion and re-creation of the Entry or the Exit this will affect timeliness. Though you cannot see the Date Created and Date Updated fields in ClientPoint, you can see them in ReportWriter.

3. The report may be run on multiple providers using "This provider and its subordinates". This selection will then populate question 4a with the provider information for the selected provider, not the subordinates. It is important to ensure the Parent provider reflects the desired provider information on the HUD Standards tab in Provider Admin.

4. There is a validation check in Sage that compares the total number of clients in Question 8a to the total in Question 5 lines 14 and 15. These can mismatch when no one in a household is marked as "Self (head of household)". Once resolved then the totals will match. Users can run the 0260 CoC APR Data Quality report to review this information.

5. HUD is aware that when a baby enters a project and has a Date of Birth that matches the Project Entry date that this will flag as a "Data Issue" in Question 2. HUD currently does not intent to revise the specifications to remove this as an error.

6. Clients that have an "Anniversary Date" that falls in the 12th month of the Operating Year need to have an Annual Assessment that is before the Report End Date or the client will flag as having a missing Annual Assessment (even though it is within +30 days). Clients that have an "Anniversary Date" that falls in the 1st month of the Operating Year need to have an Annual Assessment that is after the Report Start Date or the client will flag as having a missing Annual Assessment (even though it is within -30 days). The report specs call for data outside the reporting range to be ignored. When possible, clients with an Anniversary Date in the 1st or 12th month of the Operating Year should have an Annual Assessment dated on the Anniversary Date to avoid data quality Issues.

7. Income At Annual Assessment Errors usually caused by the Annual Assessment being outside of the +/- 30 day window. If that date is accurate then check for the following:
    a. Non-HUD values in the income sub-assessment
    b. Overlapping sub-assessment records for the same income source
    c. Mismatch between the income assessment question and the income sub-assessment.

8. Anonymous clients will show in the Data Quality section as "Information Missing" for the Name Field. You can verify this in ReportWriter using the clients table and the "Anonymous" object. A user can rename a client to "named" if the client agrees. This can be done by creating a new named client and merging the anonymous client record into the new named client record.

VERSION HISTORY

Date of Revision	Document Version #	Revision Notes
2017/06/20	V01	First Release of Document