# PATH Annual Report / CSV Export Guide

The following guide overviews the **PATH Annual Report / CSV Export** that is available within the PA HMIS to be used for annual reporting for PATH funded grants and projects. This is the report and CSV export that is needed to produce data on clients contacted and served for PATH projects used for submitting annual data to SAMHSA's PDX system.

Please note that the PATH Annual Report / CSV Export has both a report and an export option available. The report can be used to view an instant version of your annual submission data. For your official annual report submission to SAMHSA, the CSV export option should be used to generate the required file to be uploaded to the PDX reporting system.

All users with access to the PA HMIS will have access to PATH Annual Report / CSV Export and is located under the **Home** -> **Case Manager Report** area. There are four folders in this area, and this report is located within the HUD / HMIS Reports -> PATH Reporting section within the **PATH Annual Report / CSV Export** option.
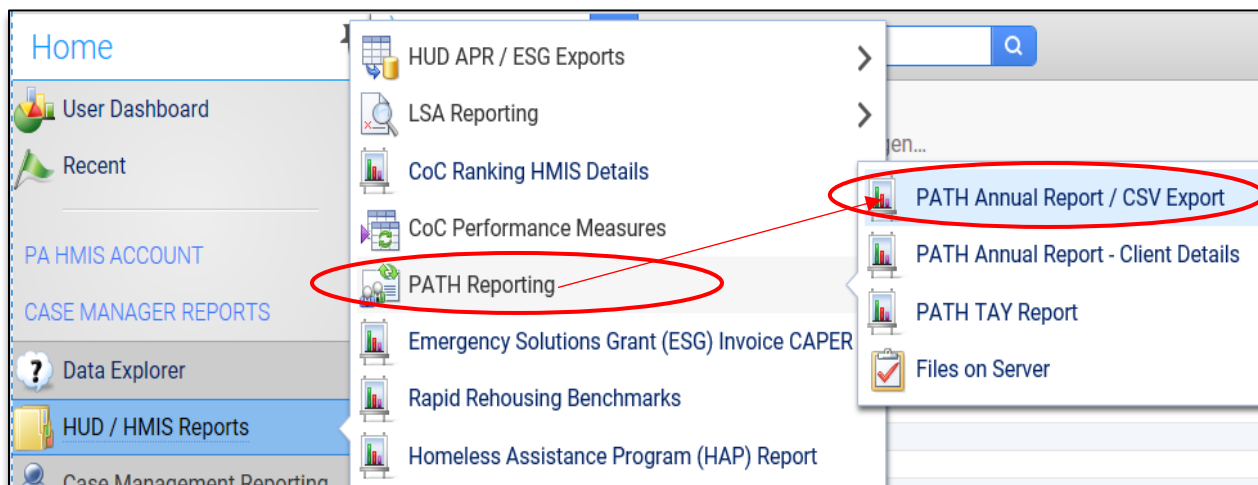
After selecting the Case Manager Reports folder, hover over the HUD / HMIS Reports folder, which allows for the individual reports to appear. Hover over the PATH Reporting folder and you will see all reports / exports related to PATH Reporting. Select the **PATH Annual Report / CSV Export** to begin the report / export process.

Once loading the PATH Annual Report / CSV Export, the options to generate the report will be same as in the past (and is the same for all PATH reports) and include the following filters.

Date Range: the report allows you to enter in a date range for the report, which will determine which served or contacted clients to include on the report. The system provides predefined date ranges to select from or you can manually enter the Begin and End Dates.

PATH Grant(s): the report will also require you to select a specific PATH grant you want data to be included for on the report. This filter determines which programs will be displayed in the next filter, which determines which client data is used to generate the report. You can select one or more grants to include on the same report.


Please note that you will only be provided with a list of PATH Grants for which your current organization has access, in most cases this will be a single grant, although for County and Grant Administration organizations this could include multiple grants.

Program(s): once the PATH Grant filter has been selected the report will generate all PATH programs associated to those grants during the date range entered. The program(s) option is not required and the report will include all associated PATH programs based on the grant(s) selected by default.

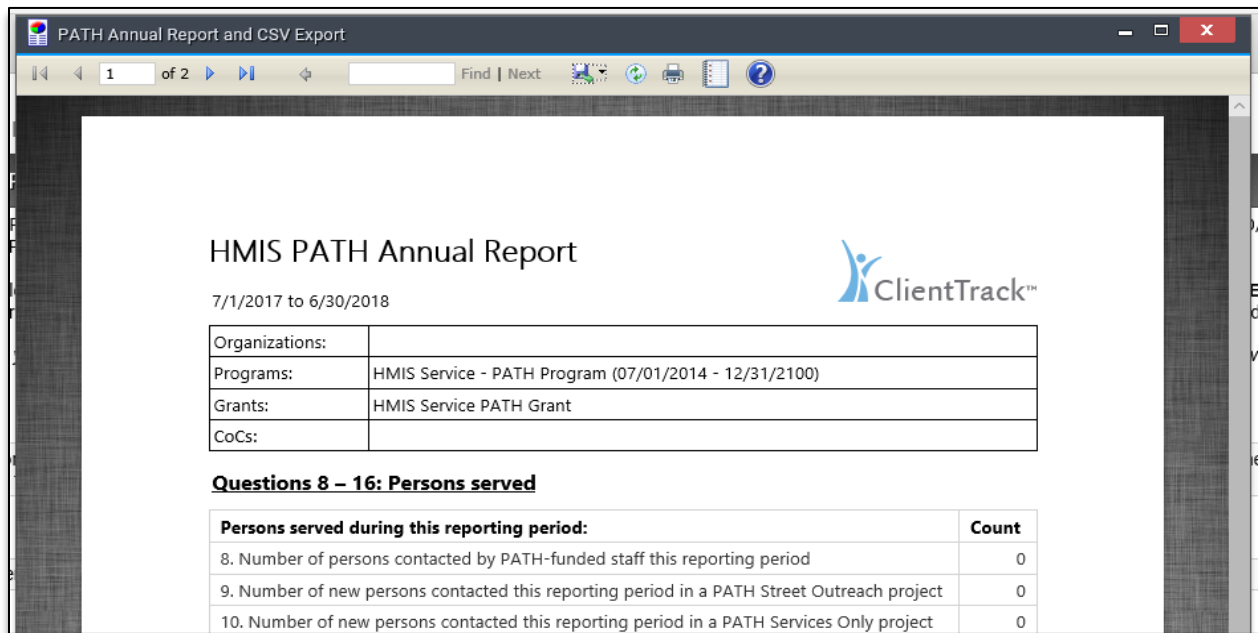**Run Report**: once the above filters have been properly set, select the "**Report**" option to produce an instant report version of your Annual Report, which can be reviewed and saved to PDF, Word or Excel using the option shown below at the top of the report window.
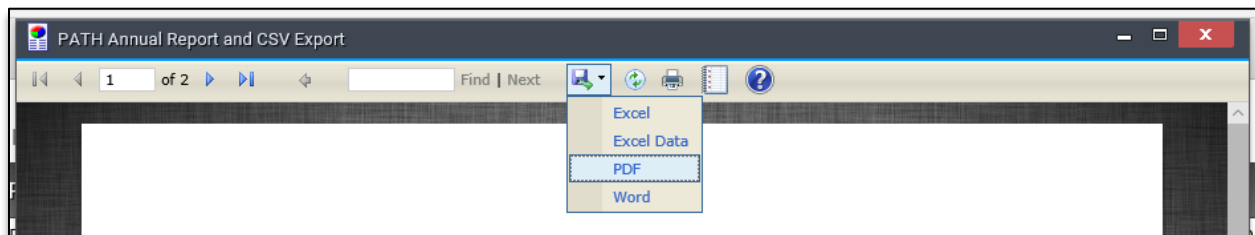
The information included within the PATH Annual Report is the same data that will be included in your CSV export and the report should be used for data checking and informational purposes only.

For your official submission to PDX please use the "Run Export" option detailed below to generate a CSV export file to use, once the data in the report is ready to go.

Generate the Export: once the report filters have been properly set, select the "**Run Export**" button on the bottom right-hand side of the screen. This option will begin the process to generate your PATH Annual Report CSV Export within PA HMIS.

Once selecting Run Export, you will be prompted with the following questions, which include Encrypt Export, Include Header Row in CSV File(s) and Always Quote CSV Value(s).
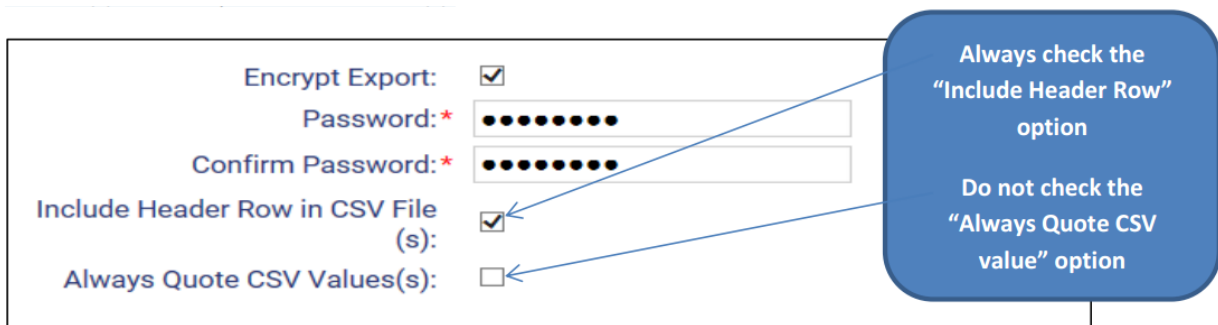
With the Encrypt Export, if you select this option the system will ask for a secure password. If you uncheck this option no password is needed. **Please note that if you do secure the export you will need to use the password entered during this process to retrieve your PATH CSV file (not your PA HMIS password).**

Once you have completed this step hit "Done" on the window and the system will provide you with the following message.
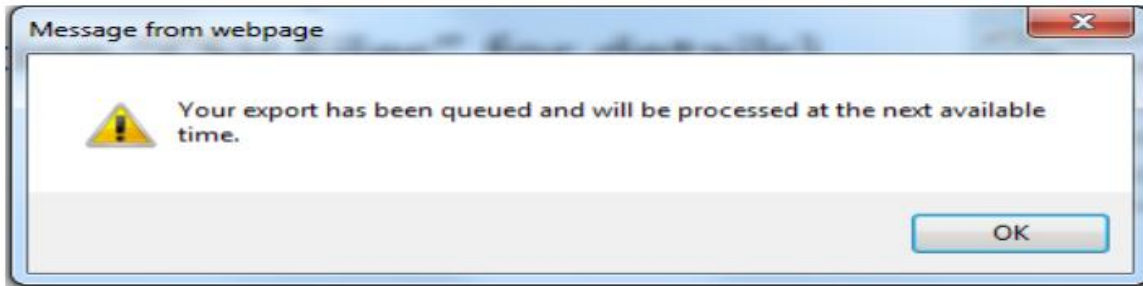

Please note that the CSV export is a collection of files and does not generate automatically. Your PATH CSV export will be placed into a queue and will be processed over a period of 10-20 minutes depending on the size of your data and the number of organizations requesting exports.

Retrieving the PATH CSV Export: once your PATH file has been completed, sometime after the processing timeframe, you can use the **Files on Server** option/screen to retrieve your export. This is where all PATH files (and all exports) are placed once they have been finalized by PA HMIS.

The **Files on Server** is located within the same PATH Reporting folder displayed earlier, and is the bottom option in the sub-folder.
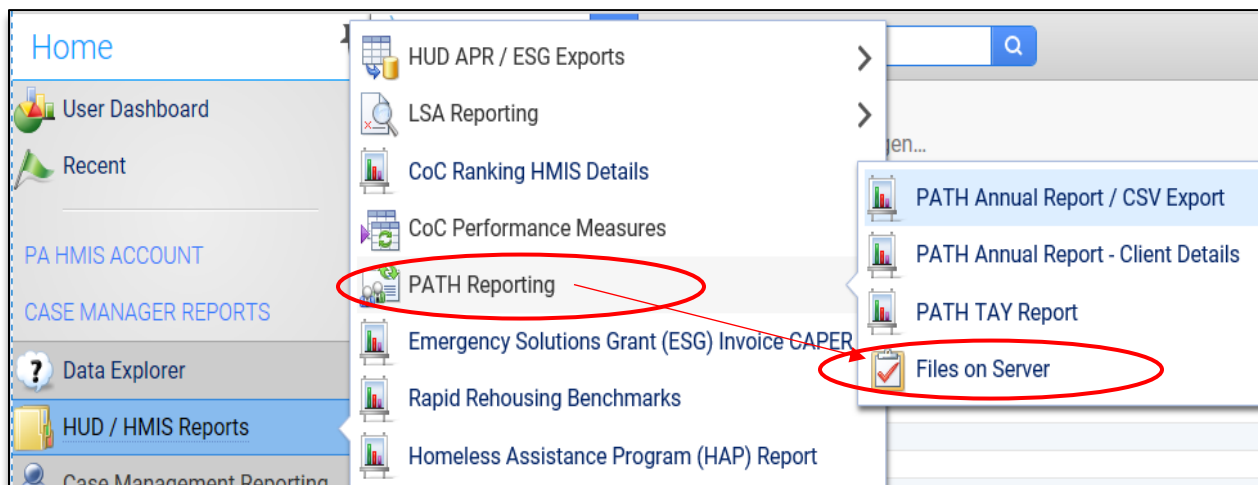

When viewing this option, it will display your PATH file when complete as each export file will be listed on its own row. If the screen is empty please give the system more time to complete the processing of your file.
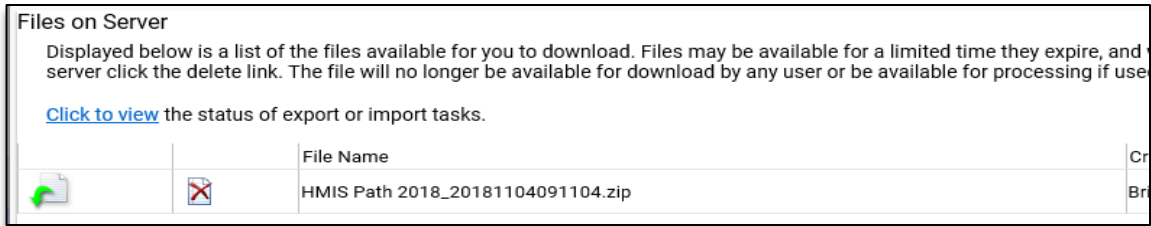
Once the PATH export is completed and available within the Files on Server screen, it will be named and labeled as **HMIS Path 2018_[Date and Time].zip**.   This is the file that contains the appropriate CSV files needed for official submission to the SAMHSA PDX system.

To download you file you need, the one named HMIS Path 2018...zip, use the first icon in the row (green arrow) to begin the process. Once you click this icon, your computer's operating system will walk you through the steps of saving (and naming) this file to your local computer.
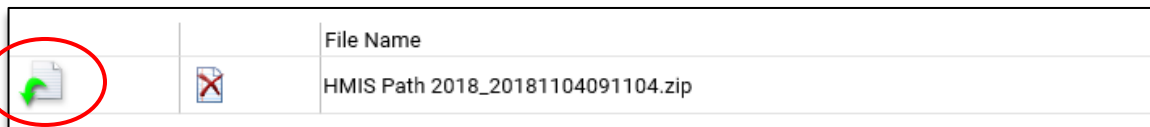
Once you begin the download you should see a pop-up message from your computer asking you to open / save the file. We recommend using the Save -> Save As function which allows you to save it to a specific location on your computer and name the file something easy to find late (PATH for Program ABC).
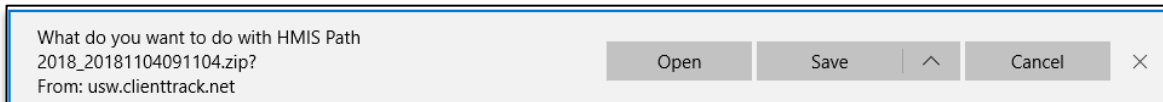
Please note that if you have not encrypted the PATH Export file (i.e. did not add a password), it will generate in the needed .zip format and can be downloaded and directly uploaded to SAMHSA's PDX Repository. If you have encrypted the PATH file (added a password) please see the instructions below on retrieving your files and making them PATH PDX upload ready.

Retrieving an Encrypted Export: when you have encrypted your PATH export, prior to downloading the final file, you are required to enter in your password to complete the process. Within the Files on Server screen the system will provide you with your PATH data file, but you will need to run a decryption program after you download the file (by selecting the green arrow like above).

After the program runs, you will be prompted to enter in the password for the PATH files and prompted for where on your computer the files should be placed.

Once the form is completed, select the Extract option on the bottom and the system will provide you with the 5 CSV files that make up the PATH CSV Export. You will then need to take those individual CSV files and place them into a final ZIP file for upload to the SAMHSA PDX system.
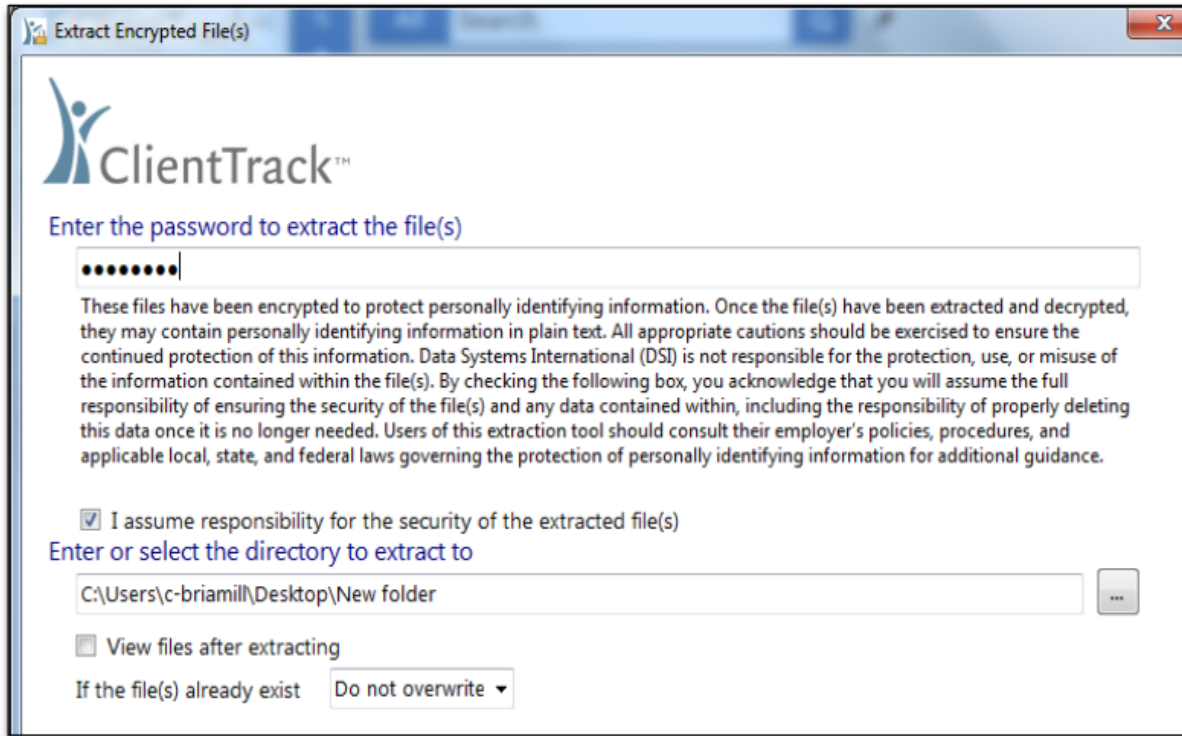
SAMHSA PATH Data Exchange (PDX):
All official PATH reporting is submitted to the PATH PDX system, starting on October 1st, 2018 all PATH Annual Reports submitted are required to be in a CSV Export format.

Once you retrieve your electronic PATH data file from PA HMIS you will need to upload this file (it must be uploaded in a standard zip file format) to the PATH PDX system for your annual submission. Below is the link to the PATH PDX system and instructions for this year's reporting process.

SAMHSA PATH PDX System

PDX Reporting

October 1, 2018
PDX opens for 2018 Annual Reporting

December 31, 2018
SPC Deadline for Approving All Provider Reports
*SPC's may choose to set a state-specific deadline for providers to submit reports*

CSV Upload Process is Live
To upload CSV Data – click on the "Upload HMIS Data" link on the first page of the 2018 Report

PATH Annual Report – Client Details:
While the PATH Annual Report / CSV Export generates data for your grants and programs, it is on an aggregated or summary level. To assist with providing information on a client details level, we have provided a details report called the **PATH Annual Report - Client Details.**

This details report is located within the PATH Reporting folder, circled below, and can be used as a companion report to the official PATH Annual Report and can also be throughout the year to review PATH client and service data as needed.
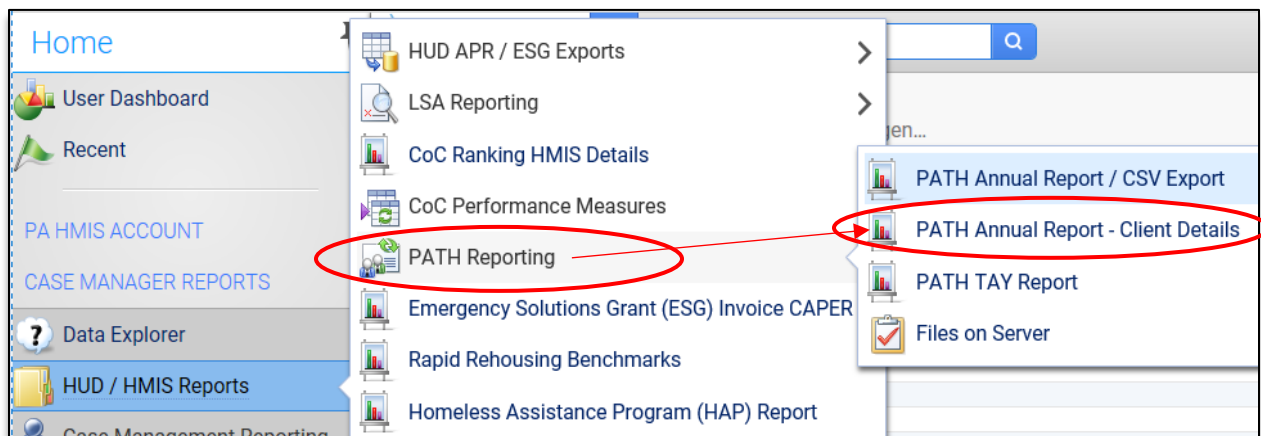
Selecting this option will load the report screen where you can enter in your date range, PATH Grant and optionally select program(s) from that grant for inclusion on the details report.

Please note that the filters for running the client details report match the actual Annual Report with the only difference being the details report can only be run on 1 grant at a time to focus on individual client detail information (but can include/exclude multiple programs within a single grant).

The PATH Annual Client Details report, much like the official Annual Report is separated into 5 sections, each containing a specific set of question(s) and information along with the client(s) from which the aggregated data was derived.

Persons Served (Q8 – Q16):

The initial section displays all PATH clients included in questions 8 through 16 and only includes active clients within reporting period. Each client included in this section is listed individually and provides information about their PATH enrollment and whether they are included in the various questions.

Q8 - 16: Persons Served (all active clients)

Review all PATH client information (click to load report)

HMIS Service Agency				HMIS Service - PATH Program								
Client Name	Age	First Contact Date	Engagement Date	Date of PATH Enrollment	Exit Date	Enrollment Type	Q8. Contacted (i.e. Active)	Q9/10/11. Newly Contacted	Q12. Pre-enroll Contacts	Q13. Newly Ineligible	Q14. Newly Enrolled	Q15. Enrolled	Q16. Enrolled w/CMHS
Anderson, Paul (110663)		8/1/2016	10/4/2016	10/4/2016	10/5/2016	Enrolled	Yes	Yes	1		Yes	Yes	
Craven, Wes (110667)		8/15/2016	9/29/2016	9/29/2016	10/3/2016	Enrolled	Yes	Yes	1		Yes	Yes	
Davis, Jim (81429)		11/17/2014			1/19/2015	Contact Only	Yes	Yes	0				
Jenkins, Scotty (110547)	22	9/26/2016	9/29/2016	10/2/2016	10/2/2016	Enrolled	Yes	Yes	4		Yes	Yes	

Please note that the PATH Annual Report only includes "active" clients, which are those persons that have either been enrolled, contacted or provided a service within the report period.

Services Provided (Q17) and Referrals Provided (Q18):

The 2nd and 3rd sections displays information on all PATH services and PATH referrals provided to actively enrolled clients during the reporting period.

The aggregated numbers are displayed as with the Annual Report, but the client details report provides a link to sub-reports for services, contacts and referrals and when clicked/selected a new report will load with client level information on each transaction.

Q17: Services Provided

Review all Services Provided (click to load report)

Review all Contacts (click to load report)

Type of Service	Number of Persons Receiving this Service
Reengagement	0
Screening	0
Client Assessment	0

Q18: Referrals Provided

Review all Referrals Provided (click to load report)

Type of Referral	Number Receiving each Referral	Number who Attained the service from the Referral
Community Mental Health	1	0
Substance Use Treatment	0	0

Outcomes (Q19 – Q27):

The 4th section displays all PATH clients included in the Outcome questions, which contains all actively enrolled clients during the report period. Each client is listed and displays their information for each question at entry, and their follow-up time frame based on whether they are a Stayer or Leaver.

Q19 - 27: Outcomes (all actively enrolled clients)								
HMIS Service Agency			**HMIS Service - PATH Program**					
Client Name	**Age**	**Status**	**Income Source**		**SSI/SSDI**		**Non-cash Benefit Source**	
			Entry	*Follow-up*	*Entry*	*Follow-up*	*Entry*	*Follow-up*
Anderson, Paul (110663)		LEAVER		No	No	No		No
Craven, Wes (110667)		LEAVER		No	No	No		No
Jenkins, Scotty (110547)	22	LEAVER	Yes	No	Yes	No	No	No

A stayer is a person still actively enrolled at the reporting end date, a leaver is a person that exited during the report period.

Demographics (Q28):
The 5th section displays all PATH clients included in the demographic question, which contains all actively enrolled clients during the report period.   Each client is listed and displays their information for each element included in the demographic question.

Q28: Demographics (all actively enrolled clients)							
HMIS Service Agency			**HMIS Service - PATH Program**				
Client Name	**Age**	**Gender**	**Age Range**	**Race**	**Ethnicity**	**Veteran**	**Co-occurring Disorders**
Anderson, Paul (110663)		Female		Two or More Races	Non-Hispanic/Latino	No	No
Craven, Wes (110667)		Male		White	Data not collected	No	No
Jenkins, Scotty (110547)	22	Female	18 - 23	Two or More Races	Hispanic/Latino	No	No