

PA HMIS SSVF Data Export Guide

The following guide will walk users through the process of extracting data from the PA HMIS system powered by Client Track for their SSVF program(s) for import into the SSVF VA Repository.

SSVF Data Export Steps:

The SSVF Data Export is available to users that have either Agency Manager or Assistant Agency Manager access in the system, this is based on your Workgroups, as any workgroup ending with either manager type will provide you access to this export tool.

Once logging into the system, navigate to the Home tab, and select either the Agency Manager Functions or Assistance Manager Functions folder on the bottom left-hand corner of the screen.

Once within either folder, navigate to the Data Import/Export Tools -> Exports folder (hover over the menu to view its sub-folder contents) and locate the below circled **SSVF Data Export - 6.1** function, which is the main function for pulling the necessary SSVF/VA data out of the system. Simply select this option to load the data export screen.



- 1) Running the Data Export – this first step is completing the three required filters and running the data export report. Please note that this should be run once for each upload you need to perform to the SSVF VA Repository and most likely will be on a per SSVF Program basis.

Please refer to the rules provided by your SSVF Grantee on how the SSVF data should be uploaded to the SSVF VA Repository.

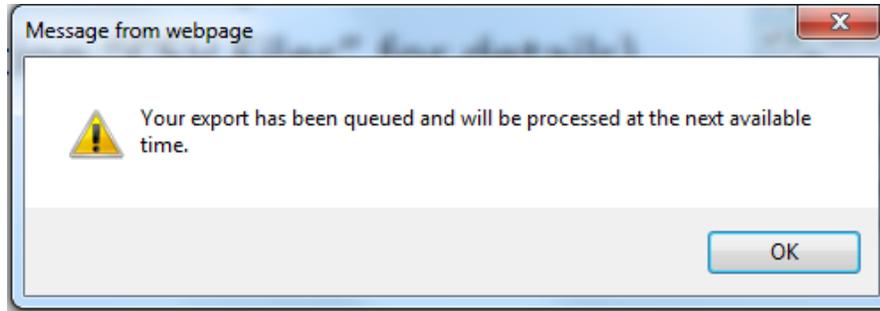
The screenshot shows the SSVF data export configuration interface. At the top, there are three fields: "Predefined Date Range:" with a dropdown menu set to "-- SELECT --", "Enrollments active between:" with a date range of "10/01/2014" and "09/30/2015", and "Export Date:" with a date of "03/29/2016" and a time of "10:16 AM". Below these fields, there is a section for "Organization(s):*" with a list of organizations: "Haven House Shelter", "HMIS County/Grant Administrator", "HMIS Service Agency" (which is selected with a green checkmark), "Home Nursing Agency Community Services", and "Housing Authority of Butler County". Below the organization list, there is a section for "Program(s):" with a checkbox for "Filter by Program(s)" which is checked. The list of programs includes: "HMIS Service Agency - Permanent Supportive Housing", "Housing", "HMIS Service Agency - SSVF HP Program" (selected with a green checkmark), "HMIS Service Agency - SSVF RR Program" (selected with a green checkmark), and "HMIS Service Agency - Supportive Services". A red callout box on the right side of the screenshot contains the following text: "Export Dates: enter in the start date and end date of the export", "Organization: this should default to your current agency", and "Programs: select the SSVF programs to include in this data export".

The Start Date should be the beginning date of your initial grant (10/1/2014 or 10/1/2015, etc.) and the End Date should always be the date you are running the export. With the programs, since SSVF grants contain two programs, one for Rapid Rehousing (RR) services and one for Homelessness Prevention (HP) services, each export should contain at least two selected programs.

Once the filters have been configured, select the **“Run Export”** button on the bottom of the screen to generate your data export. You will be prompted with the following screen which allows you to place a password on your export file if so desired. To skip the password security, uncheck the encrypt password option.

The screenshot shows the password security configuration screen. At the top, there is a text box that says "Indicate if the exported file(s) should include a header line at the beginning of the file indicating what each of the values in the CSV file represent." Below this, there are three fields: "Encrypt Export:" with a checked checkbox, "Password:*" with an empty text input field, and "Confirm Password:*" with an empty text input field. At the bottom, there is a field "Include Header Row in CSV File(s):" with a checked checkbox.

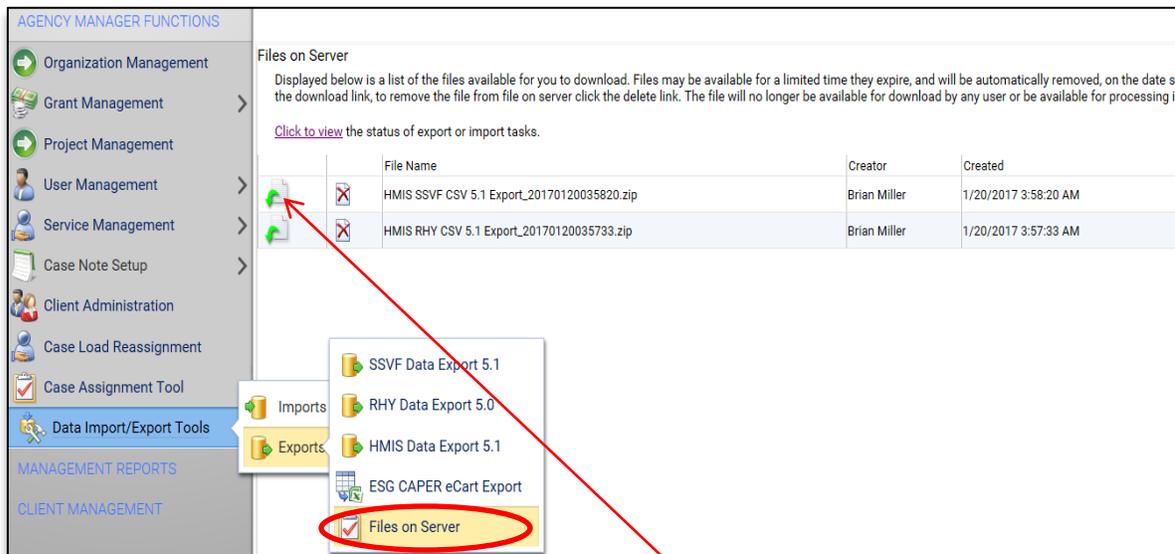
Please leave the “Include Header Row...” box checked, as this is required for the data import into SSVF VA Repository. Once you have completed this step, the system will provide you with the following message.



At this point in time you have pulled the data you need out of the system, and ClientTrack is producing the zip file that will contain the individual CSV files required to be included in the data export.

Please note that it will take ClientTrack between 15 and 30 minutes to complete this process and produce your SSVF Data Export Zip File.

- 2) Retrieving the Data Export File – once the 15 to 30-minute window has passed, you will need to check the **Files on Server** option located with the same Data Import/Export Tools -> Exports folder as shown below. Once ClientTrack has finished processing the Zip File this is where it will appear for you to download.



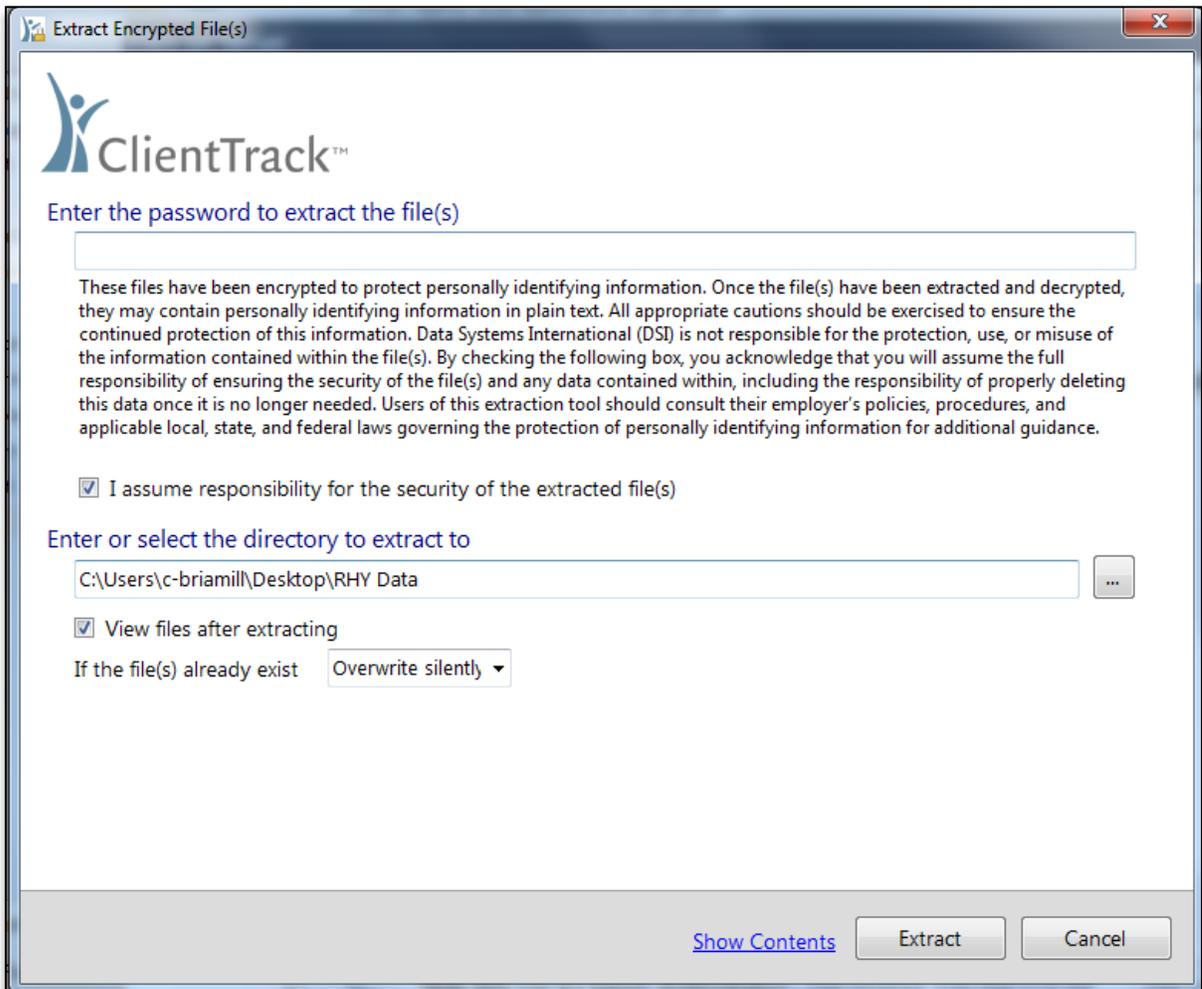
Each SSVF data export you performed will appear in this area of the system and each row contains its own data export file. To begin the download, click the green icon at the beginning of each row, and your computer's operating system will walk you through the process of saving this file to your local computer (i.e. using the standard Save or Save As prompt near the top or bottom of your computer screen)



Once the file is saved to your computer, please remember the location and we recommend renaming it to something easier to identify (i.e. SSVF Data Export for November 2016, etc.). At this point, if you chose not to use a password to secure the data export, you are finished, please take the Zip file provided and move to the next step, which is uploading it to the SSVF VA Repository.

If you encrypted your data export file with a password, the system will provide you with an executable program that once the password is entered will provide you with the files needed to upload to the SSVF VA Repository.

You will need to double-click on the file provided by ClientTrack and you will be prompted with the following screen that will require you to enter in the password used during the initial export process, along with assume responsibility for the files by checking the box below.



Once the form is completed, select the Extract option on the bottom and the system will provide you with the individual CSV files that make up the SSVF Data Export.

You will then need to take those individual CSV files and place them into a final ZIP file for upload to the SSVF VA Repository.

SSVF VA Repository Upload:

As a final note, once you have the zip file(s) for your SSVF program(s) you will need to navigate to the VA Repository as in the past (<https://www.hmisrepository.va.gov>) and login with your standard credentials.

Please make sure to select the “Upload FY15 Data” option, and then select the appropriate program and select the zip file from your computer.



You will need to perform these steps for each of the separate zip files you need to upload to repository.