The following guide will walk users through the process of using the HMIS Data Import tool to import data from a standardized HUD CSV 5.1 file directly into the PA HMIS. This tool can be used to import data from other data systems into the PA HMIS for reporting or direct use purposes.

The HMIS 5.1 CSV Import tool is available on the HOME workspace/tab within the Data Import/Export Tools -> Imports folders as shown below. Selecting this option will begin the data import process and all steps needed to configure and run the import is contained within this function.
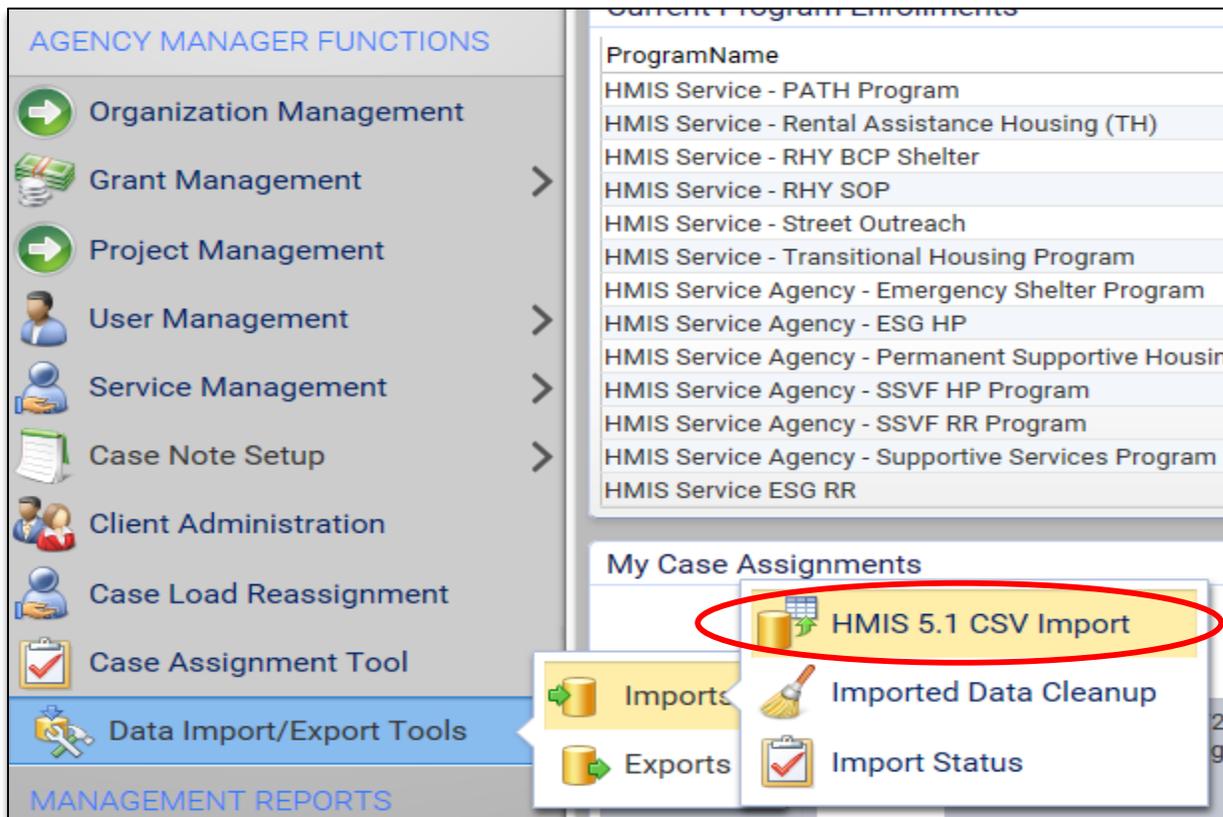
Please note that for the process to complete successfully the imported file must conform to the HUD CSV 5.1 specifications and all included CSV files should be placed into a single zip archive file prior to beginning the process. Also, all of the appropriate programs and grants should be setup in HMIS, along with the destination organization in which the data will be imported, prior to beginning the process.

Step 1: Import Data

Once the HMIS 5.1 CSV Import option is selected the system will begin a workflow that will step you through each step needed in the process. The initial step prompts you to select the organization in which the data will be imported into PA HMIS (the program(s) is prompted for in another step), as well as uploading the zip file to begin the process.
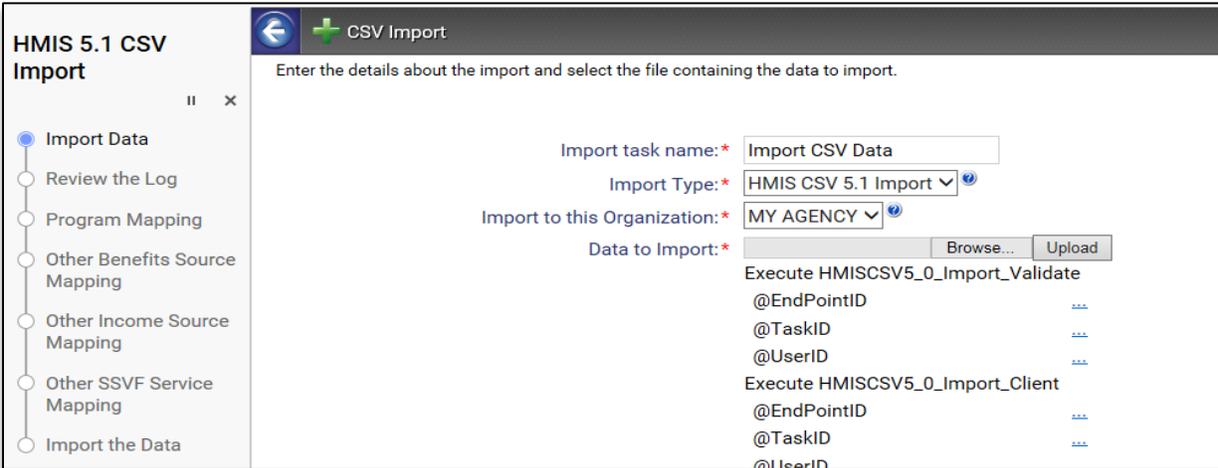
The import data step prompts for the *Import Task Name*, *Import Type*, *Import to this Organization* and *Data to Import;* all must be completed before continuing to the next step and are detailed below.

Import task name: defaults to "Import CSV data", this can be changed to something more specific (i.e. Agency XYZ Import [1/1/17]) to help with tracking its status in the future.

Import Type: select the "HMIS CSV 5.1 Import" option, which is the only one available

Import to this Organization: this option sets the specific HMIS organization in which the data will be imported, select the proper organization the import is for from the available drop-down list.   This option will dictate where client/household data will be placed and in future steps which programs you can import enrollment/case data into.

However, if you do not see your organization already predefined in the list than you will need to create this option by using the **Add New** option available at the bottom of the list and identified below.
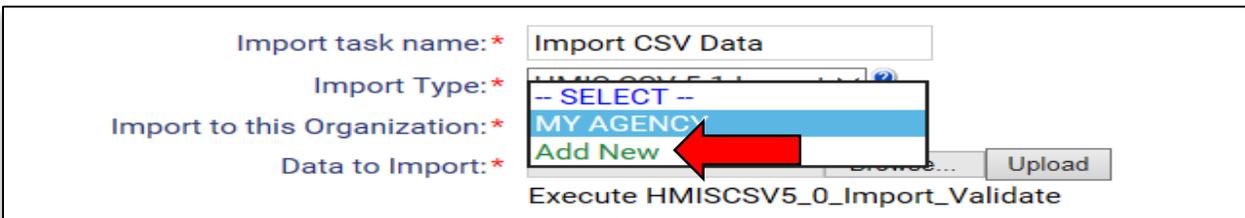
Once you click on Add New, the system will generate a new pop-up window that allows you to define your organization in which to allow imported data to be placed.
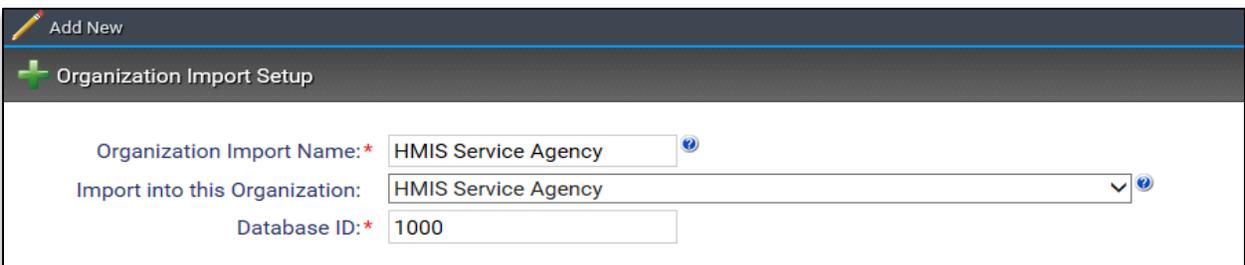
Complete the Organization Import Name, Import to this Organization and Database ID fields, once finished hit save and the system will return you to the Import Data step.

The Organization Import Name should be the name of the import organization (this naming convention will greatly help for future imports), select that organization from the Import into this Organization drop-down list and enter in the Database ID of the source system.

For the Database ID this will help identify the source system from which the data was generated in future imports, this is a 1 to 8 digit number which you can make up or receive from the vendor of that source system.

Data to Import: this option allows you to select and upload the HUD CSV 5.1 file to the system which contains the data to be imported. Select the browse button which will allow you to search through your local system and select or choose the appropriate zip file.

Once the zip file has been selected hit the Upload button to allow the system to integrate the files and associated data into the system.

Once you have completed these 4 elements and the Data to Import has a status of "Uploaded" as shown below, you can move to the next step by hitting the save button on the bottom of the screen.

Step 2: Review the Log

Once the import data step is complete the system will perform an initial import of the data into staging tables to assistance in verifying the data is readable and the files are in the proper structure. This step provides a summary review of the data imported at this point.

At this point, each of the included CSV files should be processed and inserted into the staging tables. We recommend to quickly scan the results and see if there are any noticeable errors in the log. If the log does not show any problems such as "missing fields" or "read errors" than you can continue by hitting finished at the bottom of the screen.

If you do notice a problem or any error/missing messages, we recommend stopping the process by cancelling out of the import workflow and contact the PA HMIS Helpdesk for assistance. At this point no data has been imported into the HMIS and cancelling at this point will not cause any issues.

Step 3: Program Mapping

Upon continuing to this step, the system will identify all of the individual programs included in the data import for enrollment/case/assessment information. Depending on the import this could contain 1 program or many programs, as the import can import as much data for an individual organization as needed.

The program(s) included in the import from the source system will be listed in the Project Name column, and the system will require you to select the corresponding program in which to place the data in PA HMIS in the PA HMIS Program column.
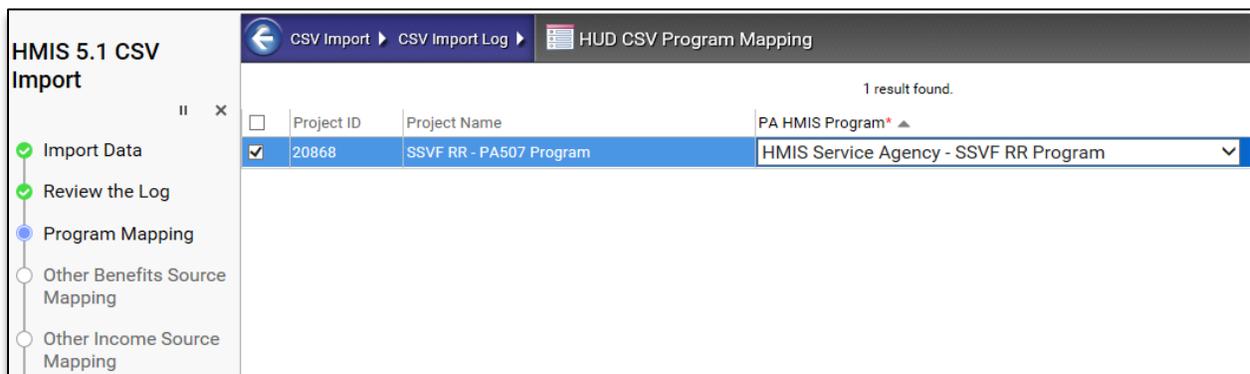
The PA HMIS Program column will provide a list of all programs available in PA HMIS at the organization the import is configured for from the first step. Once the program(s) are configured select the save button at the bottom of the screen.

Please note that once an import program is identified and configured for a specific PA HMIS program the system will remember this configuration for future imports to the same organization. Also, any program that is not mapped to its PA HMIS counterpart in this step will be not included in the import.

Step 4-6: Benefit/Income/Service Mapping

Once the program mapping is completed the import process will prompt with three screens that relate to the mapping of non-traditional non-cash benefit, income and service records that are included in the data set.

Since the standard benefit, income and service types are known from system to system and already predefined in PA HMIS most of the records are properly mapped and imported by built-in logic. For those records that are non-standard (i.e. "other" types) and not immediately recognized by the system

during the import you will be asked to quickly map the source types to the PA HMIS types to ensure proper mapping.

The "Other" column on the left-hand side will present the identified benefit/income/service type from the source system and will require that you map it to the PA HMIS/ClientTrack counterpart be selecting the most appropriate choice from the drop-down list.
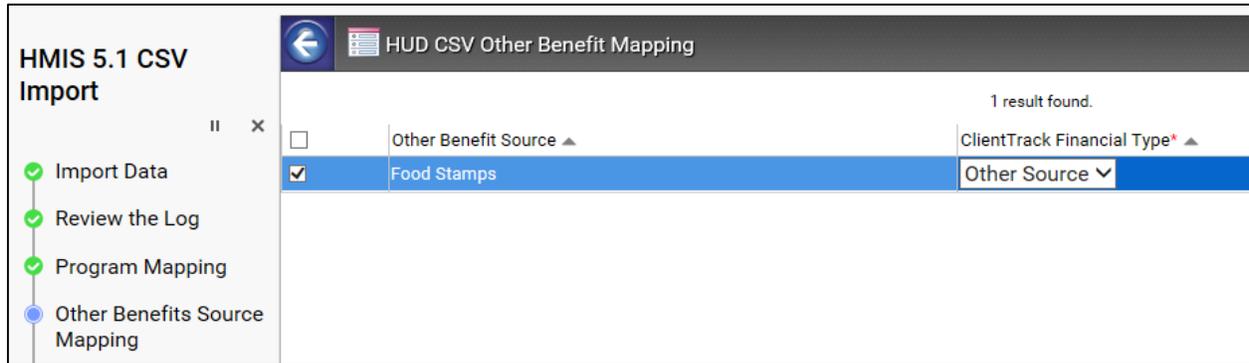

Once completed with the screen, which may have no "other" records that need mapping, hit the "save and close" button to finish the step and move to the next screen.

Please note, as with the program mapping, once the initial mapping is completed with steps 4 through 6 the system will save this information for use with future imports.
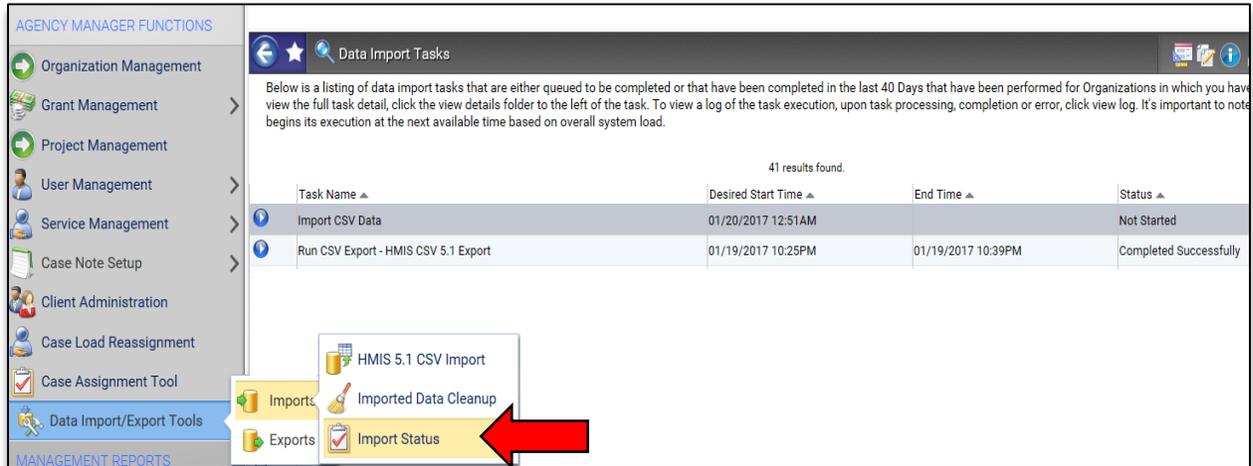
Step 7: Import the Data

Once you have completed the mapping steps, the process will prompt you with a final confirmation to import the data.

Selecting "Yes, import that data" will successfully complete the process and the system will begin the process of actually importing the data into the system. Selecting "No, reject the data" will cancel the process and no data will be imported.
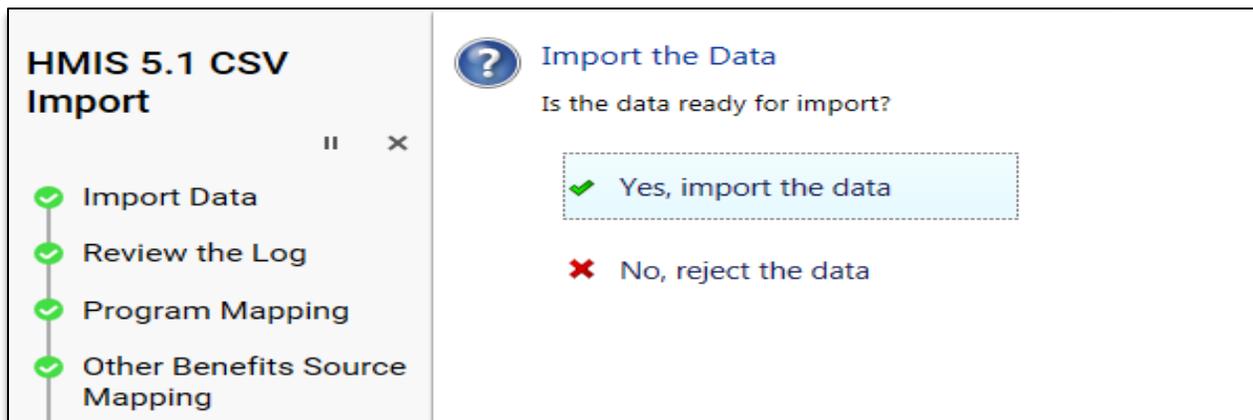
Import Task Status:

As with the data exports, the data imports are not immediate and can take anywhere from 15-30 minutes to complete. You can view the status of your import task within the Data Import/Export Tools -> Imports -> Import Status function.

All of your import tasks will be displayed within the function, along with its current status. The main statuses would be Not Started, Processing and Completely Successfully and can let you know when the data has been fully integrated into the system.

If you do receive a failure message (i.e. Not Completed) we recommend contacting the PA HMIS Helpdesk for assistance.

HUD CSV 5.1 File Structure:

The PA HMIS Import Data process requires the source file to exactly match the HUD CSV 5.1 specifications and file structure, the system will point out any data or file structure problems in Step 2. All of the independent CSV files are required to be placed into and uploaded into the process as a single zip file (.zip)

While the HUD CSV 5.1 specifications contains number of independent files, the following files are used for the PA HMIS/ClientTrack import and must be included and have the same naming conventions as listed below. All of the independent CSV files are required to be placed into and uploaded into the process as a single zip file (.zip).

- o Client.csv
- o Disabilities.csv
- o EmploymentEducation.csv
- o Enrollment.csv
- o EnrollmentCoC.csv
- o Exit.csv
- o HealthAndDV.csv
- o IncomeBenefits.csv
- o Services.csv

- Project.csv*
- Organization.csv*

while data is not imported in these files the information for the organization and project / program are used for mapping purposes.

Please contact the PA HMIS Helpdesk for assistance with any initial setup or issues with your data import process or for assistance in validating the data file(s) you would like to import from another system.