

PA HMIS RHY Data Export Guide

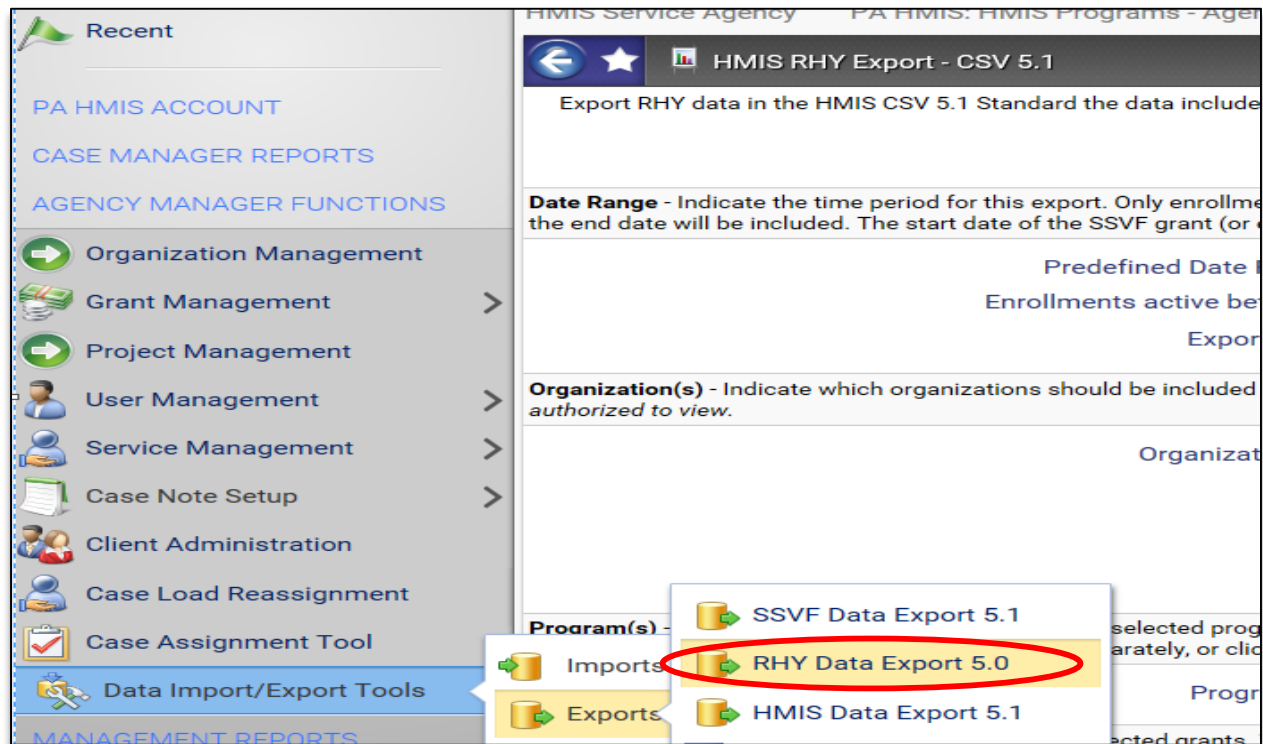
The following guide will walk users through the process of extracting data from the PA HMIS system powered by Client Track for their RHY program(s) for import into the RHY Point Data Repository.

RHY Data Export Steps:

The RHY 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 **RHY Data Export 5.0** function, which is the main function for pulling the necessary RHY 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 RHY repository and most likely will be on a per RHY Program basis.

Please refer to the rules provided by your RHY Grantee on how the RHY data should be uploaded to the RHY Point Data Repository.

The screenshot shows the configuration interface for exporting RHY data. It includes the following fields and options:

- Predefined Date Range:** -- SELECT --
- Enrollments active between:** 10/01/2014 and 09/30/2015
- Export Date:** 03/29/2016 09:59 AM
- Organization(s):** A list of organizations with checkboxes. "Haven House Shelter", "HMIS County/Grant Administrator", and "Housing Authority of the City of York" have green checkmarks. "HMIS Service Agency" is selected with a blue highlight.
- Program(s):** A list of programs with checkboxes. "Filter by Program(s)", "HMIS Service - Rental Assistance Housing (TH)", "HMIS Service - RHY BCP Shelter", and "HMIS Service - RHY SOP" have green checkmarks. "HMIS Service - RHY SOP" is selected with a blue highlight.

Callouts from a red box on the right provide instructions:

- Export Dates:** enter in the start date and end date of the export
- Organization:** this should default to your current agency
- Programs:** select the RHY program to include in this data export

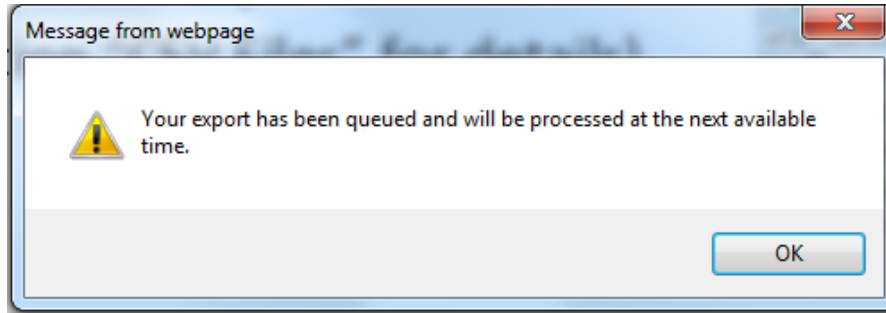
The Start Date and End Date will most likely be provided through guidance from your RHY or FSYB administrator and will cover a 6 to 12 month period of time. We recommend following the rules provided to you by your RHY grantee in how to filter the data from HMIS, which may allow for multiple programs per data export or require each data export to include only a single program.

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 options for the exported file:

- 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.**
- Encrypt Export:**
- Password:** *
- Confirm Password:** *
- Include Header Row in CSV File(s):**

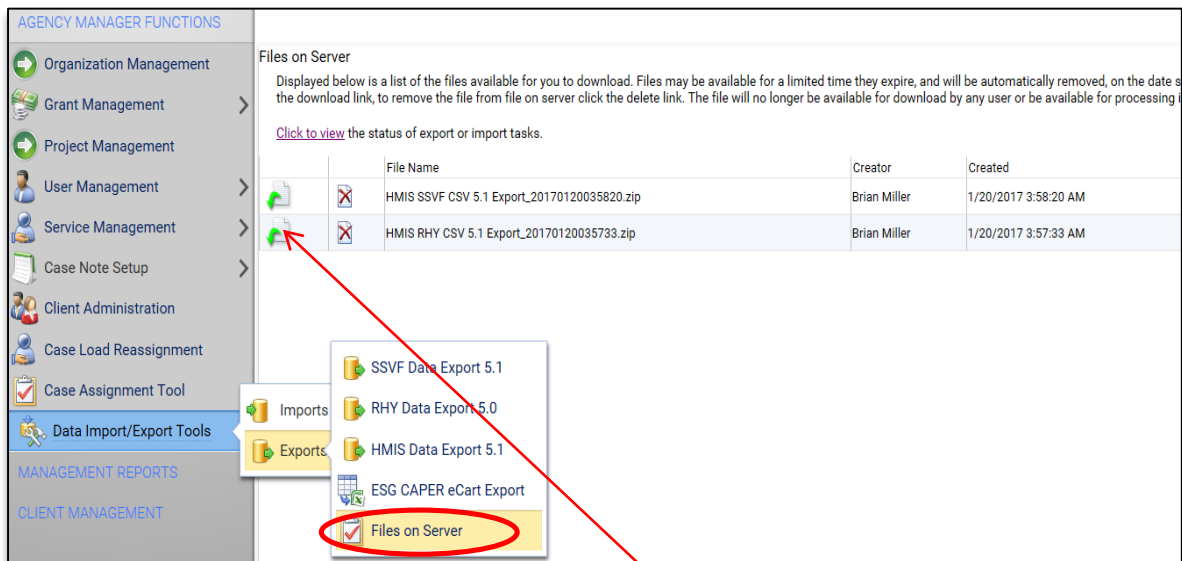
Please leave the “Include Header Row...” box checked, as this is required for the data import into RHY Point. Once you have completed this step, the system will provide you with the following message.



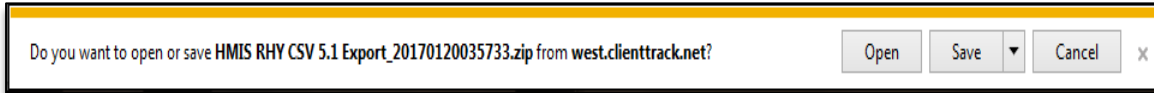
At this point in time you have pulled the data you need out of the system, and ClientTrack is producing the zip file that will contain the individual CSV files required to be included in the data export.

Please note that it will take ClientTrack between 10 and 15 minutes to complete this process and produce your RHY Data Export Zip File.

- 2) Retrieving the Data Export File – once the 10 or 15 minutes 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.



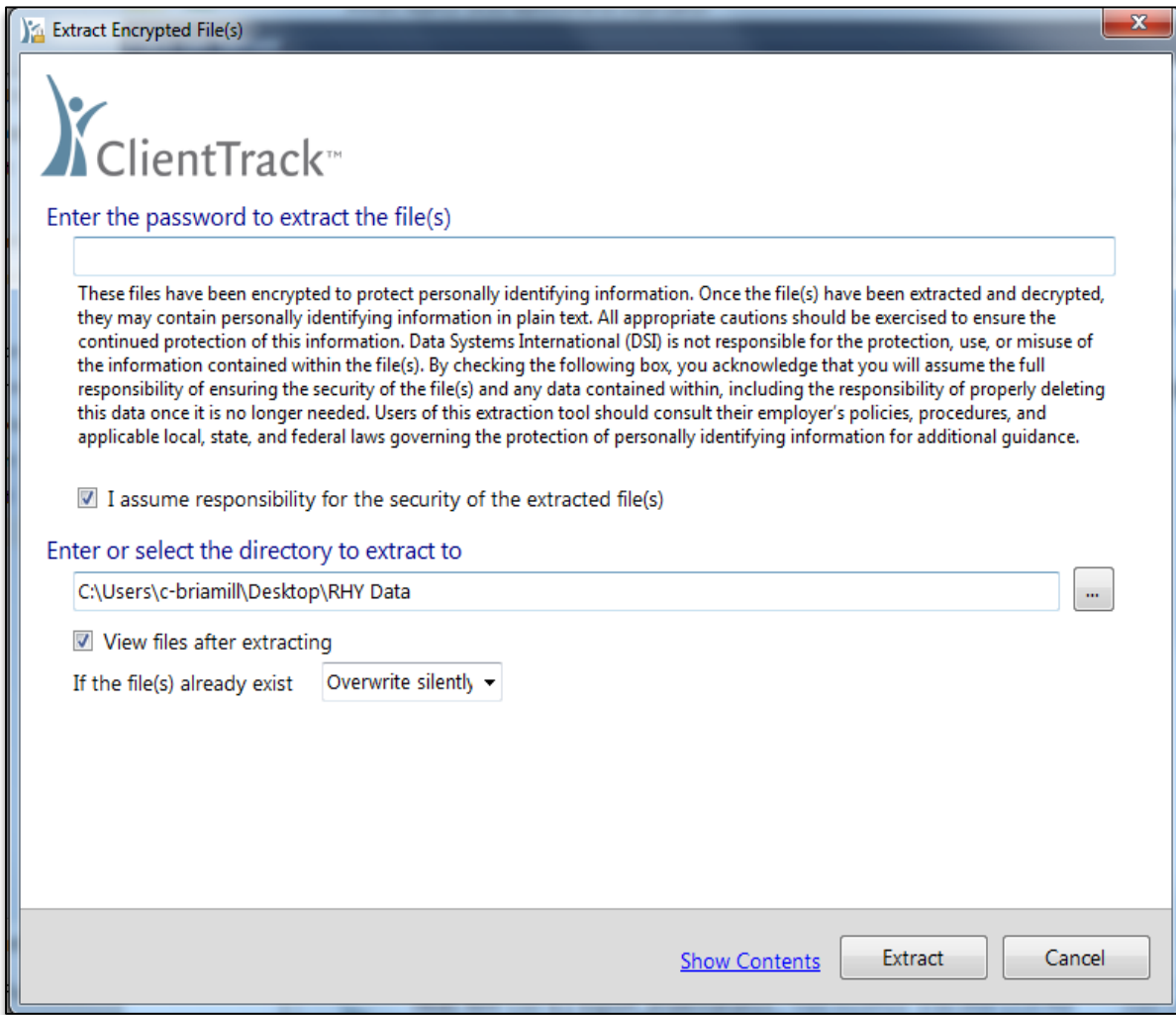
Each RHY data export you performed will appear in this area of the system and each row contains its own data export file. To begin the download, click the green icon at the beginning of each row, and the your computer’s operating system will walk you through the process of saving this file to your local 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. RHY 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 RHY Point Data 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 RHY Point 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.



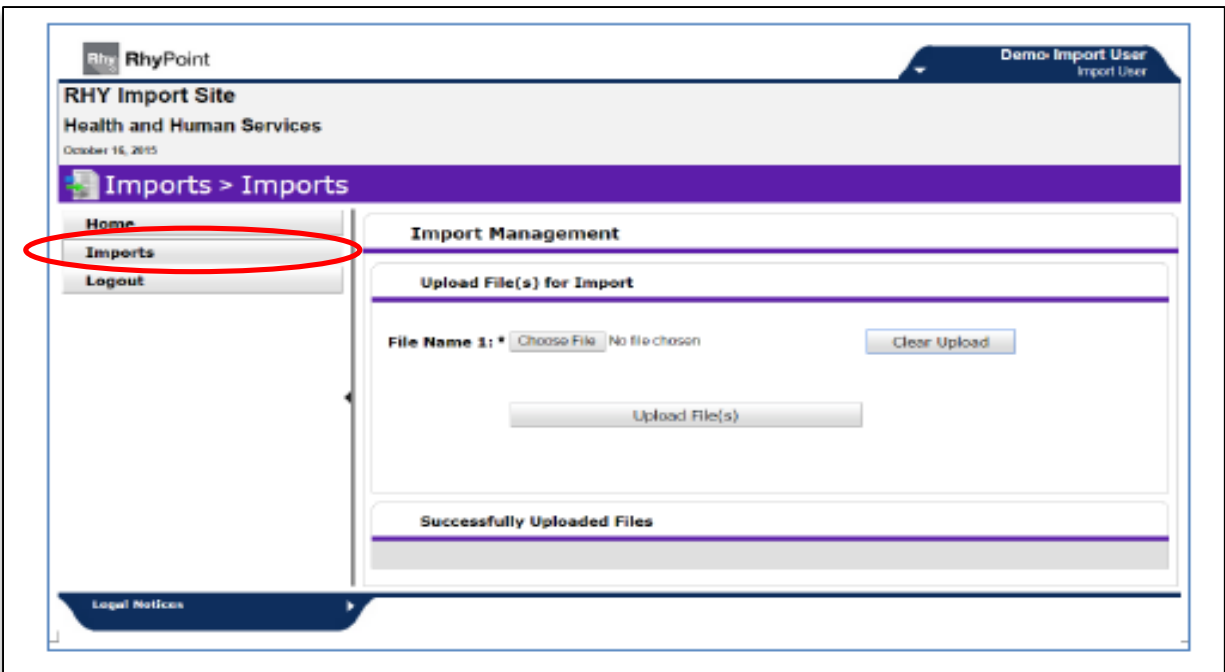
Once the form is completed, select the Extract option on the bottom and the system will provide you with the individual CSV files that make up the RHY Data Export.

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

RHY Point Repository Upload:

As a final note, once you have the zip file(s) for your RHY program(s) you will need to navigate to the RHY Point Data Repository (www.rhymis.net) and login with your standard credentials.

Once you have logged into the RHY Point system, select the **Imports** option on the main menu. This will load an area that will allow you to upload the Zip File you just exported/downloaded out of ClientTrack.



Once the Zip File has been attached, select the Upload File(s) option and the system will import the data and perform standard validation checks on the data export structure and data quality.