

PA HMIS RHY Data Export Guide

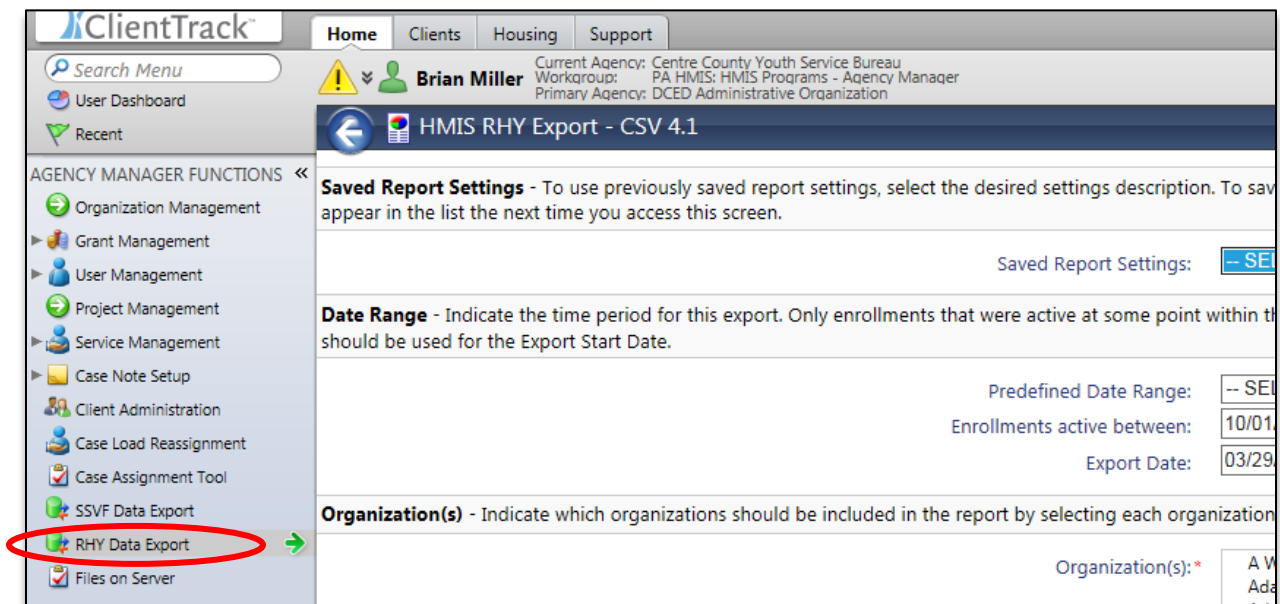
The following guide will walk users through the process of extracting data from the PA HMIS system powered by Client Track for their RHY program(s) for import into the RHY Point Data Repository.

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, the system will provide the below circled “RHY Data Export” function which is the main function for pulling the necessary data out of the system. Simply select this option to load the report 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.

Predefined Date Range: -- SELECT --

Enrollments active between: 10/01/2014 and 09/30/2015

Export Date: 03/29/2016 09:59 AM

be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list*

Organization(s): *

- Haven House Shelter
- HMIS County/Grant Administrator
- HMIS Service Agency
- Home Nursing Agency Community Services
- Housing Authority of Butler County
- Housing Authority of the City of York

lected programs. When checked, the list displays programs that belong to the organizations you selected above.

Program(s):

- Filter by Program(s)
- HMIS Service - Rental Assistance Housing (TH)
- HMIS Service - RHY BCP Shelter
- HMIS Service - RHY SOP
- HMIS Service - Street Outreach
- HMIS Service - Transitional Housing Program

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 should be the beginning date of your initial grant (10/1/2012 or 10/1/2013, etc.) and the End Date should always be the date you are running the export. With the programs, we recommend following the rules provided to you by your RHY grantee, 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.

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.

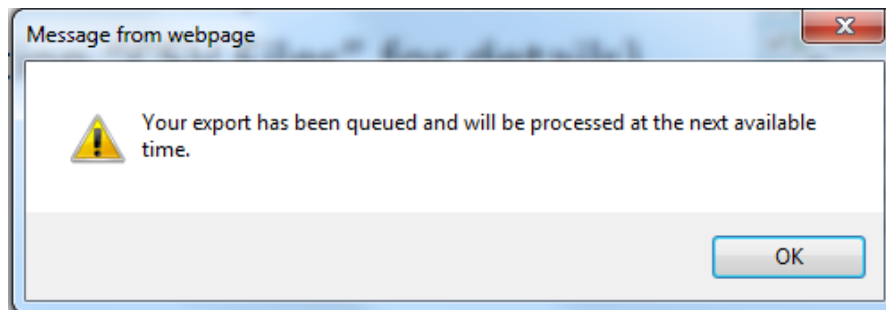
Encrypt Export:

Password: *

Confirm Password: *

Include Header Row in CSV File(s):

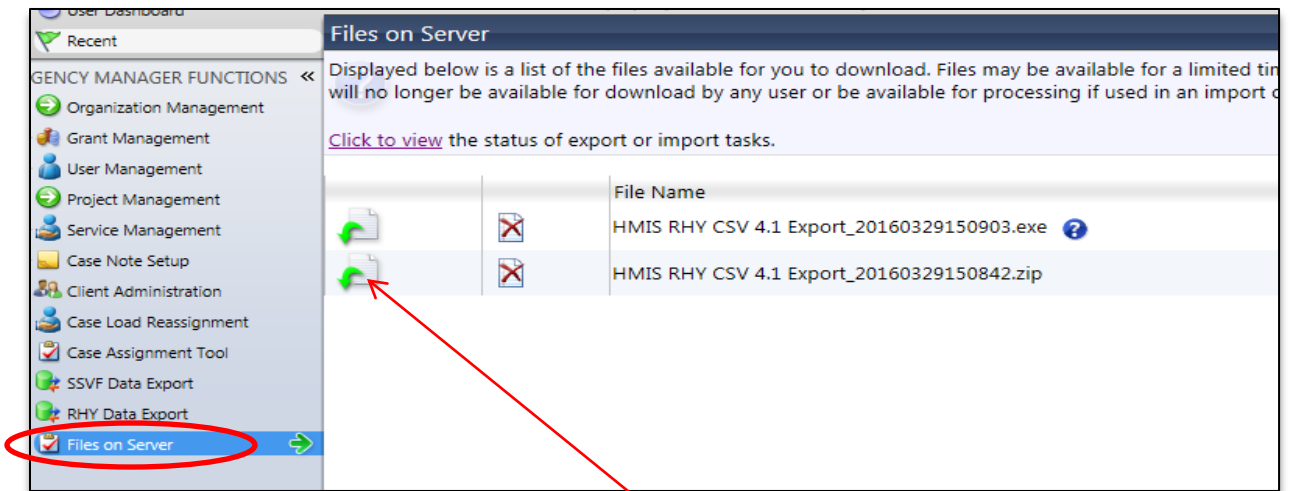
Please leave the “Include Header Row...” box checked, as this is required for the data import into RHY Point. Once you have completed this step, the system will provide you with the following message.



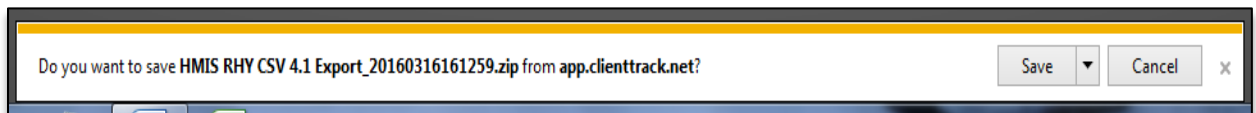
At this point in time you have pulled the data you need out of the system, and ClientTrack is producing the zip file that will contain the individual CSV files required to be included in the data export.

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 directly below the RHY Data Export function. 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 May 2015, 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.

Extract Encrypted File(s)

ClientTrack™

Enter the password to extract the file(s)

These files have been encrypted to protect personally identifying information. Once the file(s) have been extracted and decrypted, they may contain personally identifying information in plain text. All appropriate cautions should be exercised to ensure the continued protection of this information. Data Systems International (DSI) is not responsible for the protection, use, or misuse of the information contained within the file(s). By checking the following box, you acknowledge that you will assume the full responsibility of ensuring the security of the file(s) and any data contained within, including the responsibility of properly deleting this data once it is no longer needed. Users of this extraction tool should consult their employer's policies, procedures, and applicable local, state, and federal laws governing the protection of personally identifying information for additional guidance.

I assume responsibility for the security of the extracted file(s)

Enter or select the directory to extract to

C:\Users\c-briamill\Desktop\RHY Data

View files after extracting

If the file(s) already exist

[Show Contents](#)

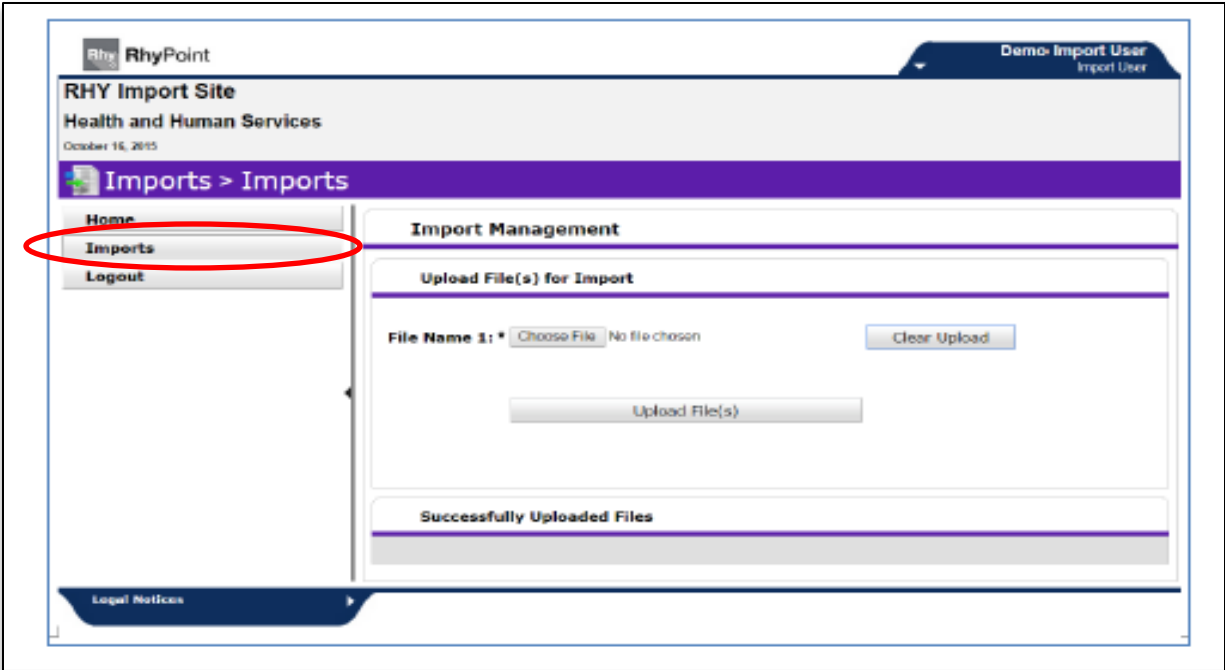
Once the form is completed, select the Extract option on the bottom and the system will provide you with the individual CSV files that make up the RHY Data Export.

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.