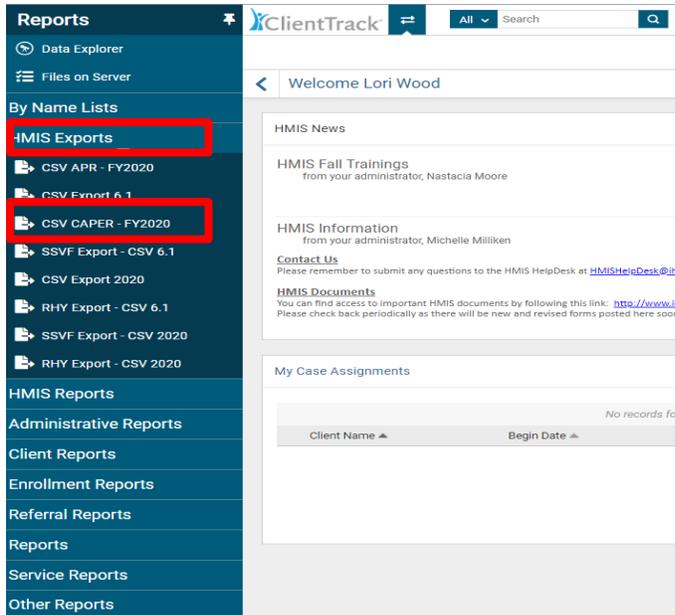


How to Export the Consolidated Annual Performance & Evaluation Report (CAPER)

Running the Export

From the “Reports” workspace, select the “HMIS Exports” option on the left-hand side of the screen. Click on “CSV CAPER - FY2020”



Setting Export Parameters

Set up the export parameters by entering the date range with a predefined option in the drop-down list or enter the date range in the “Begin Date” field. Your organization will auto populate. Select the “Grant Program,” “Grant Component,” “Grant(s),” “Project Type” and “Program” for the export. Also select “Generate Validation File” by clicking on the empty box beside it. A check mark should appear when this option is selected successfully.

ClientTrack All Search Lori Wood (Training) | Help | Sign Out

Reports

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 - SSVF Export - CSV 6.1
 - CSV Export 2020
 - RHY Export - CSV 6.1
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CSV CAPER - FY2020

Please note that multiple project and program type support is only intended for cases where multiple programs is required for APR submission. For example, a grant with multiple sub-recipients that enter data into multiple projects. Additional programs will affect performance and should only be used when necessary for compliance.

The export will return data based on the combination of all parameters you set. For example, if you choose Organizations "Agency 1" and "Agency 2" and Project "PSH 123" the report will only include clients enrolled in PSH 123 by Agency 1 or Agency 2.

Date Range

Indicate the time period for his report. Only records that fall within the date range you select will be included.

Date Range List:
 Begin Date: to

Organization

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the report.

Organization: 4 County
 A Hand Up
 ACTION Inc of Delaware County
 Affordable Housing Corporation of Marion
 Aging & Community Services of South Cent
 AIDS Ministries

Grant Program

Use the Grant Program and Grant Component drop-down selections to narrow down the list of Grants.

Grant Program:
 Grant Component:

Grant(s)

This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the icon to select all. Use the Grants filter to narrow down the list of projects for your export.

Grant(s): Filter by Grant(s)
 ESG RRH My Fake (R10)
 My Fake Org RRH (ESG-R10)

Program

A list of programs based on the grant selected.

Program Type: Filter by Program Type
 Filter by Program
 Program: ESG RRH My Fake (R10)
 My Fake Org RRH (ESG - R10)

Validation File

Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will not affect the running of or delay the main export.

Generate Validation File:

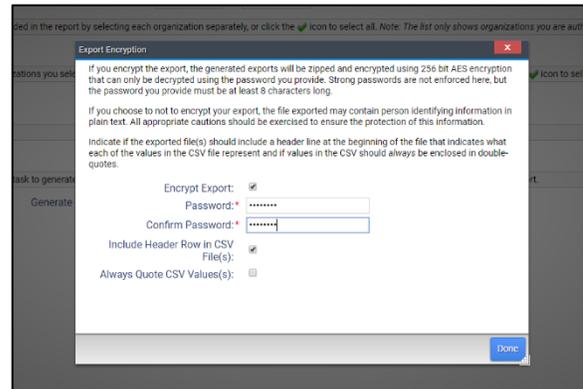
Click on **“Run Export”** in the bottom right-hand corner to begin the data export for your program.

Accessing Export Files & Report Preparation

An “Export Encryption” window will appear where you set the “Password” to protect the files. Enter a password and click “Done” to continue with the export.

To access the files associated with the CAEPR, click on the “Files on Server” link in the list of Menu Items to the left of the “Reports” screen.

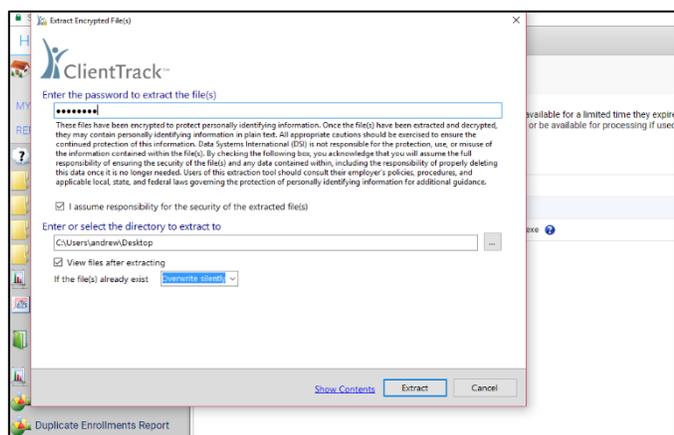
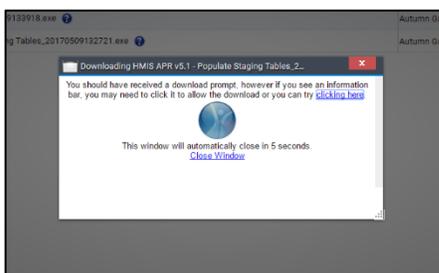
To access the CAPER files, click on the icon with the green arrow in the first row to begin downloading the files labeled “CSV CAPER 2020...” There will be several files to download (66 files total) so we recommend creating a new folder to save all the APR associated files together. This will also make it easier for you to access these files from your computer.



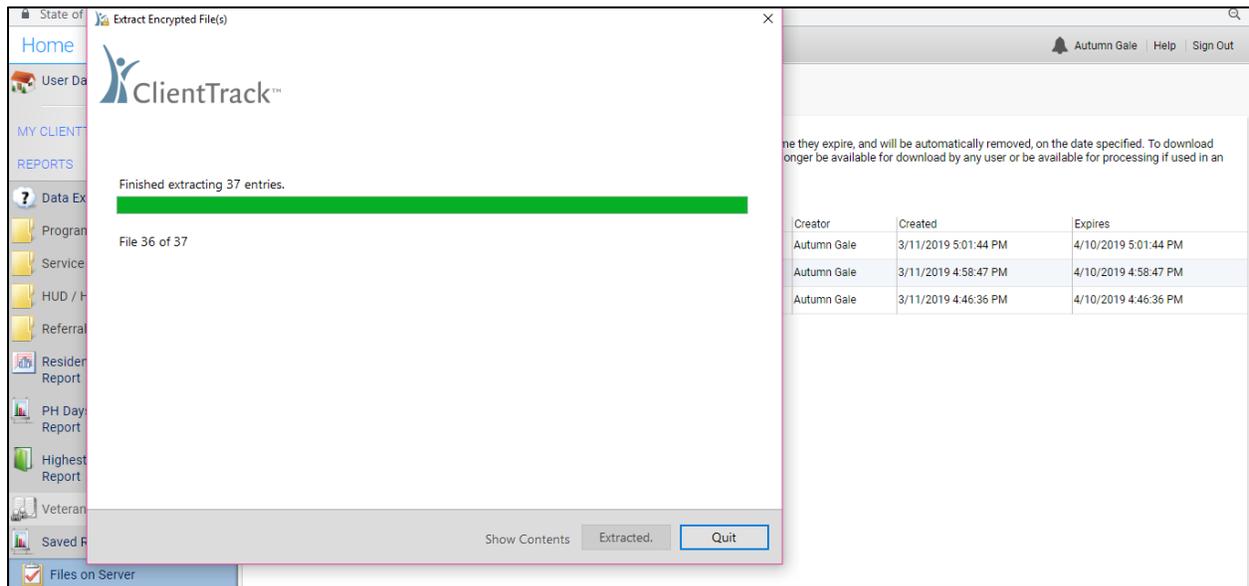
File Name	Creator	Created	Expires
HMSI_APR_CAPER_2020_Validation_20191126135316.exe	Lori Wood	11/26/2019 1:53:17 PM	12/26/2019 1:53:17 PM
HMSI_CAPER_2020_Export_20191126135309.exe	Lori Wood	11/26/2019 1:53:11 PM	12/26/2019 1:53:11 PM
HMSI_APR_CAPER_2020_Phd-Load_20191126134303.exe	Lori Wood	11/26/2019 1:43:04 PM	12/26/2019 1:43:04 PM
HMSI_APR_CAPER_2020_Validation_20191125144345.exe	Lori Wood	11/25/2019 3:43:46 PM	12/25/2019 3:43:46 PM
HMSI_APR_2020_Export_20191125143436.exe	Lori Wood	11/25/2019 3:43:38 PM	12/25/2019 3:43:38 PM
HMSI_APR_CAPER_2020_Phd-Load_20191125143306.exe	Lori Wood	11/25/2019 3:33:06 PM	12/25/2019 3:33:06 PM
HMSI_CSV_6-1_Export_20191108142901.exe	Lori Wood	11/8/2019 2:29:01 PM	12/8/2019 2:29:01 PM

As seen below, a download window will appear after clicking on the icon with the green arrow. Momentarily after that, another window will appear, where you enter the password you created to protect the data.

After entering the password, search for the location on your computer where you wish to save the files. You can also select to “View files after extracting” by clicking on the empty box beside this option. If you wish to deselect this option, simply click on the check mark again to remove it.



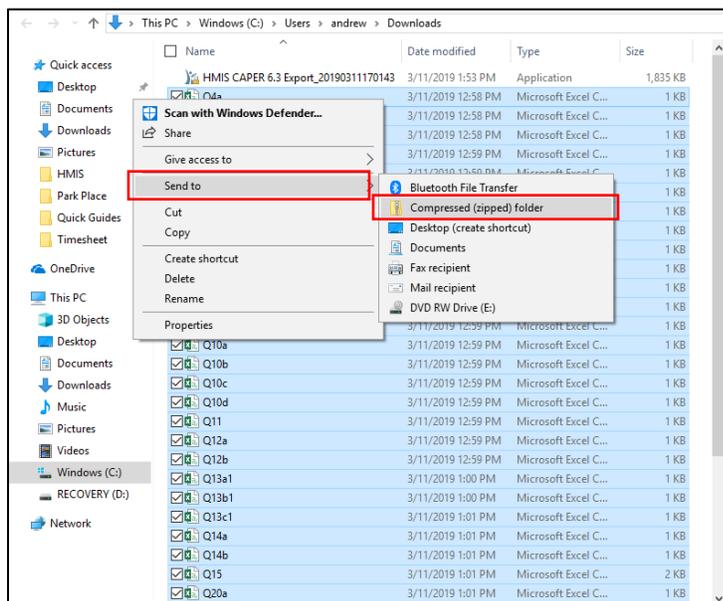
Click **“Extract”** to continue downloading the files.



An Extract window will appear to show you the status of the transfer.

Once all the files have been downloaded and extracted, you will see a list of Excel files on your computer as seen below. This concludes the CAPER export portion of the CAPER.

If you are uploading your report into Sage (and not all programs are required to do this), you can use the sandbox version of Sage to review your report (<https://demo.sagehmis.info/us/csvtest.aspx>).



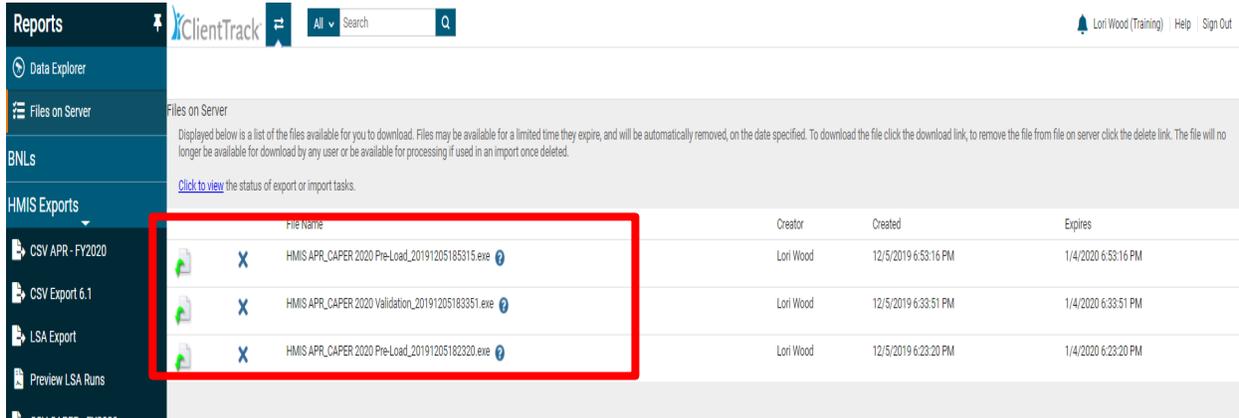
To upload your report to Sage, you must compress the CAPER files into a zipped folder. To compress the files, select all the files in the folder, then right click and hover over **“Send to”** and select **“Compressed Zipped Folder”** as seen here. The new compressed zipped folder will be what you select to upload into Sage to review your report.

How to Identify Missing Data or Data

Errors

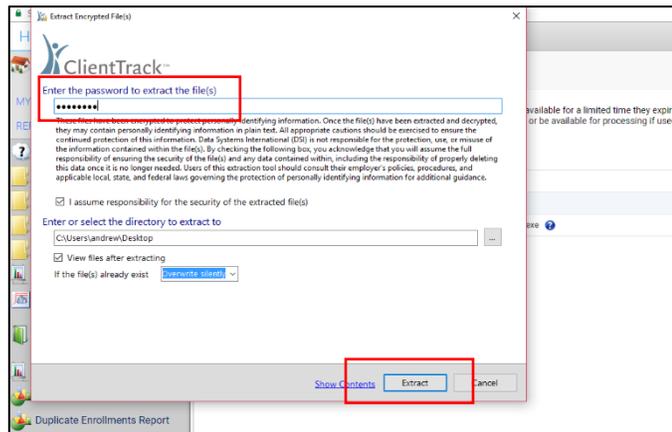
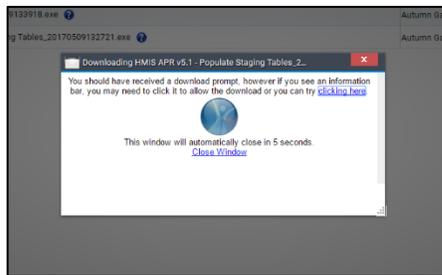
After uploading the compressed folder of CAPER files into Sage and reviewing the project’s CAPER, there may be missing data or data errors indicated. To identify missing data or data errors on the report, follow these steps.

First, go to the “Files on Server” link again to access your project’s CAPER files. This link is found in the list of Menu Items to the left of the “Reports” screen as seen below outlined in red.

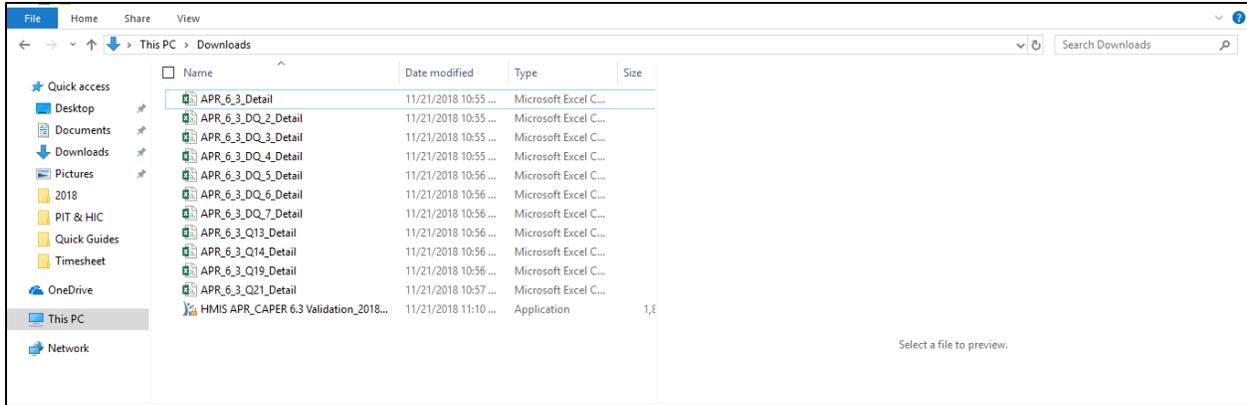


Then, access the more detailed CAPER files by clicking on the icon with the green arrow to the left of the second file in the list of three outlined in red above labeled “HMIS APR_CAPER 2020 VALIDATION...” to begin downloading the files (11 files total). Again, we recommend creating a new folder to save all the associated files together. This will make it easier for you to access these files from your computer.

As seen below, a download window will appear after clicking on the icon with the green arrow. Momentarily after that, another window will appear, where you enter the same password you created earlier to protect the data.



Once the 11 files are extracted and downloaded to your computer, you can click through each Excel file to review any missing or data error issues. To review the file, double-click on it to open and review the data in an Excel spreadsheet.



“APR_6_3_Detail” will have all the detailed client data associated with your project. Though this is the most detailed spreadsheet, we recommend reviewing the other 10 files available to drill down more specifically to the missing data or data errors. Below is an example of one of the files open as an Excel spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Data Element	ClientID	Name												
2	Destination (3.12)	982932													
3	Income and Sources (4.2) at Start	813666													
4	Income and Sources (4.2) at Annual Assessment	104469													
5	Income and Sources (4.2) at Annual Assessment	822550													
6	Income and Sources (4.2) at Annual Assessment	929862													
7	Income and Sources (4.2) at Annual Assessment	963407													
8	Income and Sources (4.2) at Exit	982932													
9															
10															
11															

You may need to widen columns or sort the data to best review any data quality issues. Feel free to manipulate the spreadsheet as a regular Excel file to best review your client information.

Once the missing data element or data error is identified, go to the client record to complete the data using the blue action wheel beside your project enrollment. Clicking on the blue action wheel will allow you to select “**Review Entry Assessments**” or “**Review Exit Assessments**” to address data issues at entry and/or exit. Be sure to save any changes you make.

Once you have had a chance to review data issues and fix them, you can run your CAPER again and upload it to Sage to review and ensure your updates resolved the data quality issues on your report.

Please do not hesitate to contact the help desk if you have any trouble with these steps or with identifying data errors on your report. Email hmishelpdesk@ihcdoonline.com for assistance.