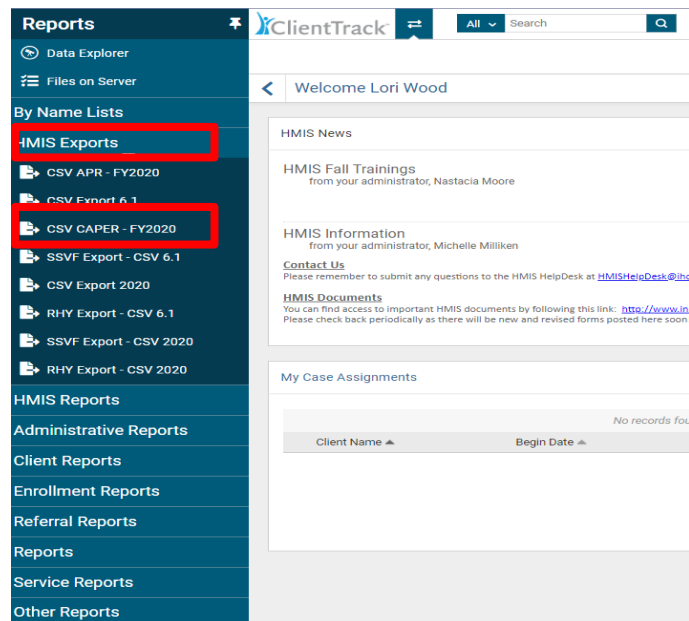


# How to Export the Consolidated Annual Performance & Evaluation Report (CAPER)

## 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.

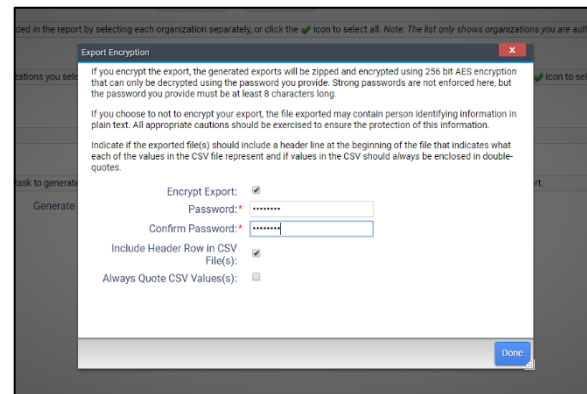
Click on **“Run Export”** in the bottom right-hand corner to begin the data export for your program.

## 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.

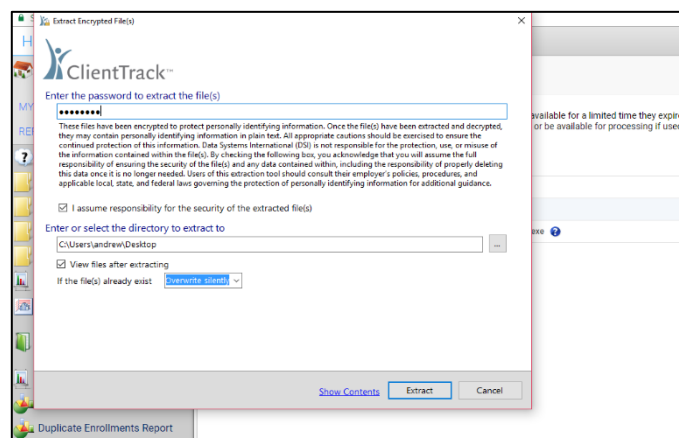
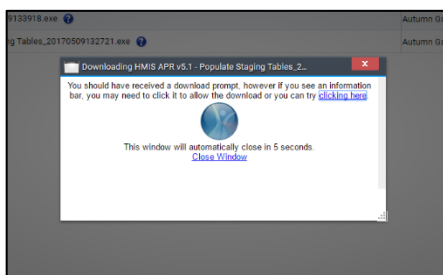
To access the CAPER files, click on the icon with the green arrow in the first row to begin downloading the files labeled “**CSV CAPER 2020...**” There will be several files to download (66 files total) so we recommend creating a new folder to save all the APR associated files together. This will also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



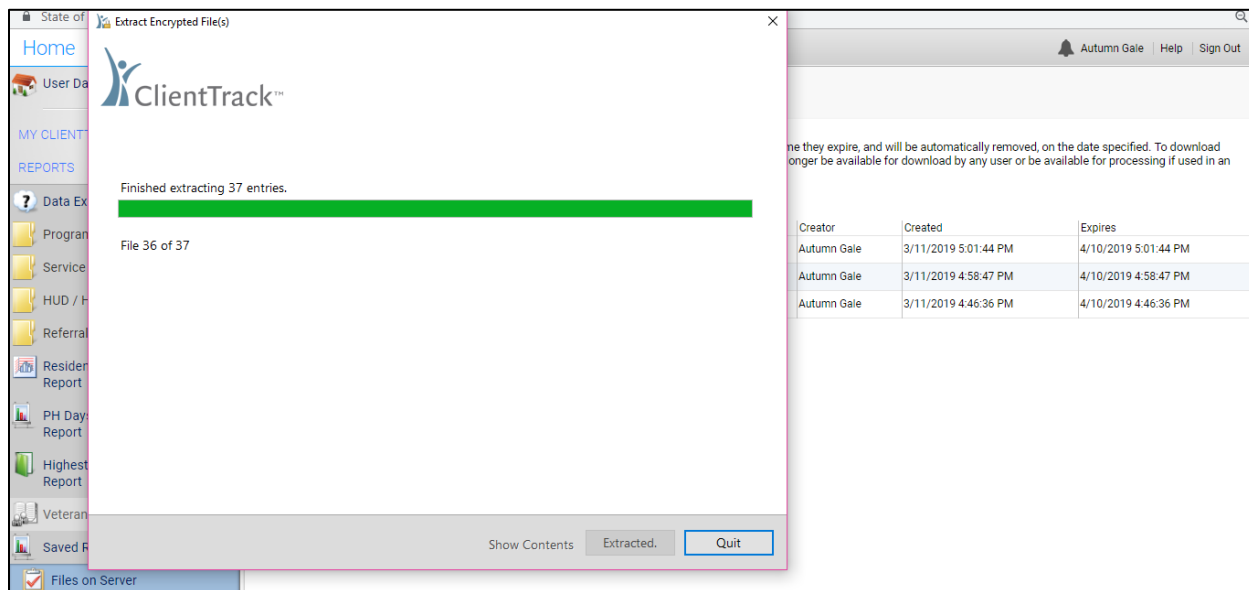
Reports				
ClientTrack				
Files on Server				
By Name Lists				
HMIS Exports				
CSV APR - FY2020	X	HMIS APR_CAPER 2020 Validation_20191126135316.exe	Lori Wood	11/26/2019 1:53:17 PM
CSV Export 6.1	X	HMIS CAPER 2020 Export_20191126135309.exe	Lori Wood	11/26/2019 1:53:11 PM
CSV CAPER - FY2020	X	HMIS APR_CAPER 2020 Pre-Load_20191126134303.exe	Lori Wood	11/26/2019 1:43:04 PM
SSVF Export - CSV 6.1	X	HMIS APR_CAPER 2020 Validation_20191125154345.exe	Lori Wood	11/25/2019 3:43:46 PM
CSV Export 2020	X	HMIS APR 2020 Export_20191125154336.exe	Lori Wood	11/25/2019 3:43:38 PM
RHY Export - CSV 6.1	X	HMIS APR_CAPER 2020 Pre-Load_20191125154306.exe	Lori Wood	11/25/2019 3:33:06 PM
SSVF Export - CSV 2020	X	HMIS CSV 6.1 Export_20191108142901.exe	Lori Wood	11/8/2019 2:29:01 PM
RHY Export - CSV 2020	X			

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.



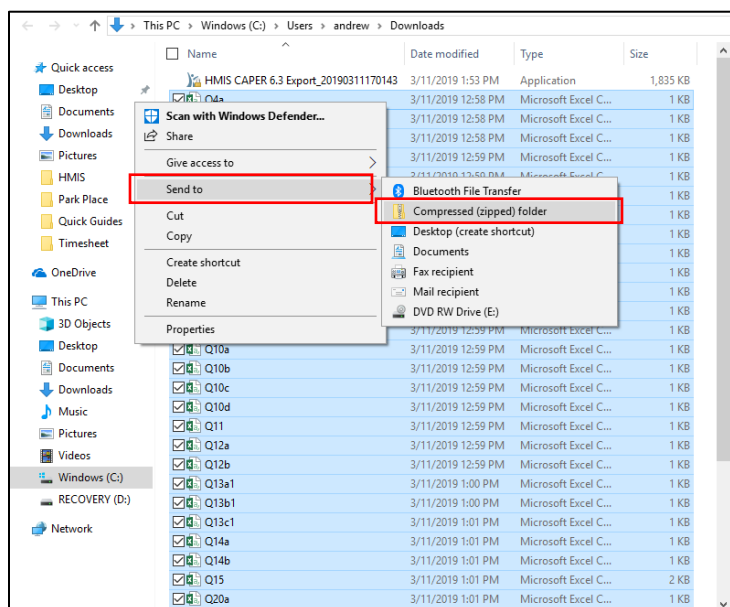
Click **“Extract”** to continue downloading the files.



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>).



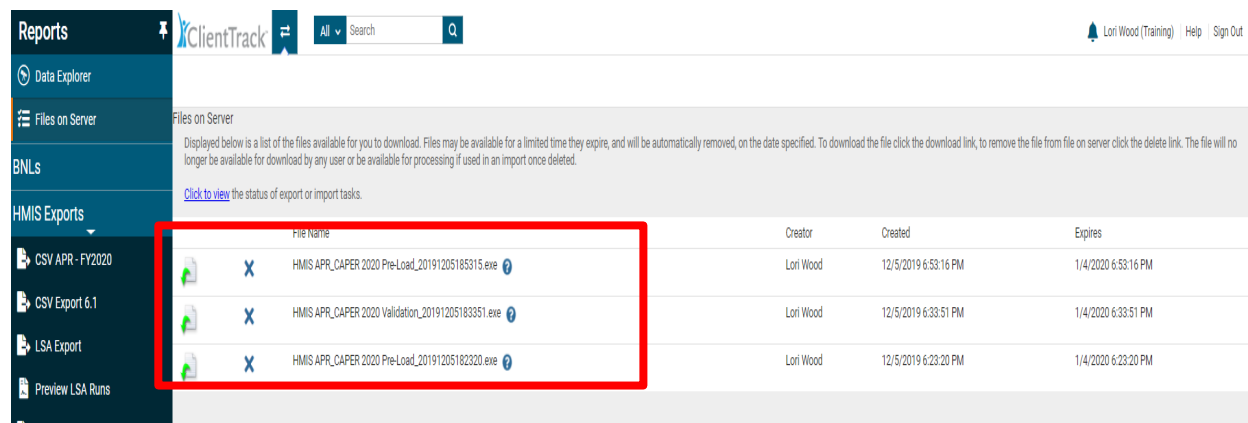
**To upload your report to Sage, you must compress the CAPER files into a zipped folder.** To compress the files, select all the files in the folder, then right click and hover over **“Send to”** and select **“Compressed Zipped Folder”** as seen here. The new compressed zipped folder will be what you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

## How to Identify Missing Data or Data

## Errors

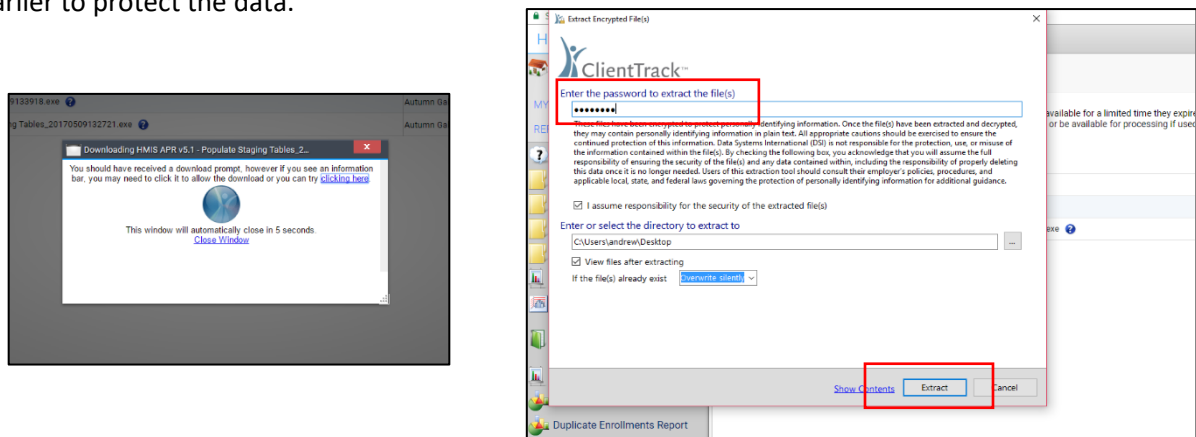
After uploading the compressed folder of CAPER files into Sage and reviewing the project's CAPER, there may be missing data or data errors indicated. To identify missing data or data errors on the report, follow these steps.

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.

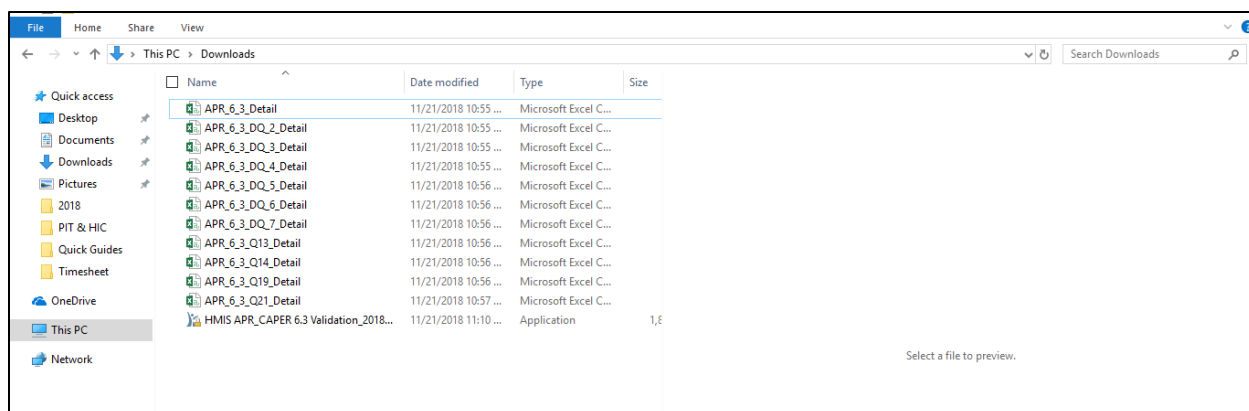


Then, access the more detailed CAPER files by clicking on the icon with the green arrow to the left of the second file in the list of three outlined in red above labeled **"HMIS APR\_CAPER 2020 VALIDATION..."** to begin downloading the files (11 files total). Again, we recommend creating a new folder 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](mailto:hmishelpdesk@ihcdoonline.com) for assistance.