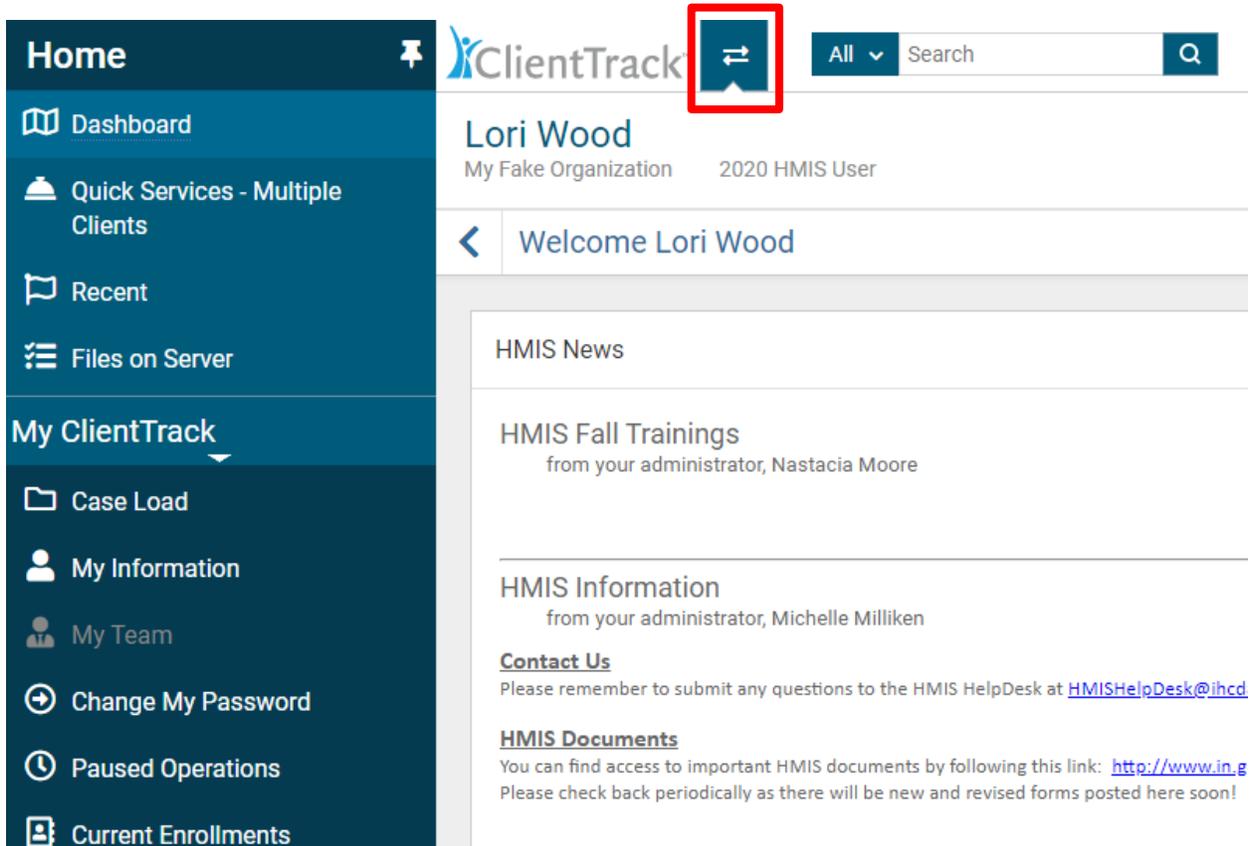
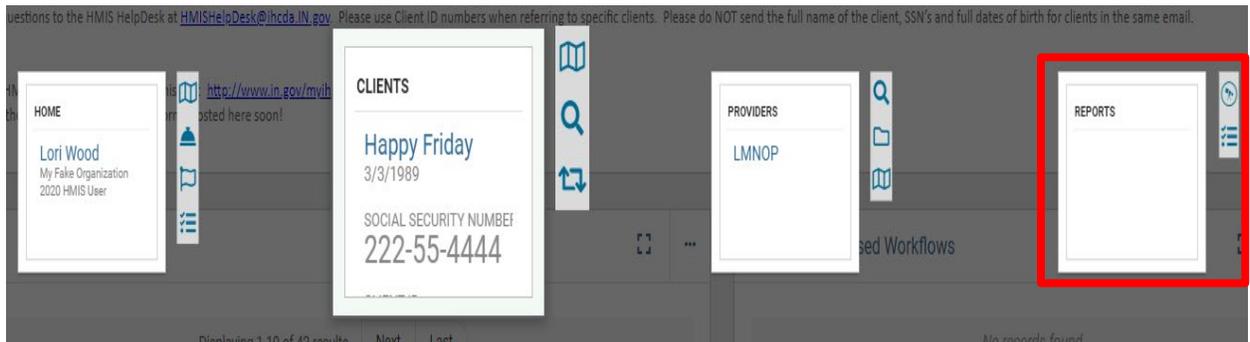


How to Run a PATH Annual Report

1. From the **“HOME”** workspace, click on the double arrow icon to the right of the ClientTrack logo at the top of the page.



2. You are now on the **“Workspace”** floating menu. Toggle to the right by clicking on the arrow located on the right side of your screen until you see the **“REPORTS”** box. Click on the **“REPORTS”** box to access the **“REPORTS”** workspace.



- From the “REPORTS” workspace, click on “HMIS Reports” located in the left-hand menu on the screen. Next, click on “PATH Annual Report (2020)”.

The screenshot displays the ClientTrack interface. The left-hand navigation menu is highlighted in dark blue and contains the following items: Reports (with a pin icon), Data Explorer, Files on Server, By Name Lists, HMIS Exports, **HMIS Reports** (highlighted with a red box), HMIS Data Entry Timing Report, Bednight Inventory and Utilization Report, HUD Data Quality Report, HOPWA APR, HOPWA CAPER, PIT Point in Time (2018), PATH Annual Report (2019), System Performance Measures (2019), **PATH Annual Report (2020)** (highlighted with a red box), System Performance Measures (2020), Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, Reports, and Service Reports. The main content area is light gray and features the ClientTrack logo, a search bar, and a welcome message for Lori Wood. Below the welcome message, there are sections for HMIS News, HMIS Fall Trainings (from your administrator, Nastacia Moore), HMIS Information (from your administrator, Michelle Milliken), Contact Us (with email HMISHelpDesk@ihcda), and HMIS Documents (with link <http://www.in.go>). At the bottom, there is a section for My Case Assignments, which currently shows "No records found." and a table header with columns: Client Name ▲, Begin Date ▲, and End Date ▼.

4. Complete the report parameters.
 - a. **“Date Range”**
 - b. **“Organization”**
 - c. **“PATH Grant(s)”**
 - d. **“PATH Program(s)”**
 - e. **“CoC Filter”**
 - f. Click **“Report”** in the bottom right-hand corner of the screen.

The screenshot shows the ClientTrack Reports interface for the 2020 PATH Annual Report. The left sidebar lists various report categories: Data Explorer, Files on Server, By Name Lists, HMIS Exports, HMIS Reports (including HMIS Data Entry Timing Report, Bednight Inventory and Utilization Report, HUD Data Quality Report, HOPWA APR, HOPWA CAPER, PIT Point in Time (2018), PATH Annual Report (2019), System Performance Measures (2019), and PATH Annual Report (2020)), Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, Reports, Service Reports, and Other Reports. The main content area is titled "2020 PATH Annual Report" and contains several sections:

- Saved Report Settings:** A dropdown menu currently set to "- SELECT -".
- Date Range:** A section for indicating the time period. It includes a "Predefined Date Range" dropdown set to "Current Month" (indicated by a red arrow) and a "Service Date Between" field with dates "12/01/2019" and "12/31/2019".
- Organization(s):** A section for selecting organizations. A dropdown menu is open, showing a list of organizations including "4 County A Hand Up ACTION Inc. of Delaware County", "Affordable Housing Corporation of Marion", "Aging & Community Services of South Cent", and "AIDS Ministries" (indicated by a red arrow).
- PATH Grant(s):** A section for selecting grants. A checkbox labeled "Filter by Grant(s)" is checked (indicated by a red arrow).
- PATH Program(s):** A section for selecting programs. A checkbox labeled "Filter by Program(s)" is checked (indicated by a red arrow).
- CoC Filter:** A section for identifying a single CoC to filter results. It includes a "State filter for CoC" dropdown set to "- SELECT -" (indicated by a red arrow) and a "CoC (optional)" dropdown set to "- SELECT -".

At the bottom right of the interface, a red box highlights the "Report" button, along with "Schedule Report", "Run Export", and "Cancel" buttons.

- The report will run and appear on the screen as seen below. You can export the report by clicking on icon with a small green downward arrow at the top of the page and then clicking on the export format. **(Excel, Excel Data, PDF or Word)**.

2020 PATH Annual Report

1 of 5 Find | Next

Excel
Excel Data
PDF
Word

HMIS PATH Annual Report

1/1/2018 to 12/31/2018

Organizations: My Fake Organization
 Programs: My Fake Organization SSO (PATH-R10), My Fake Organization Street Outreach (PATH-R10)
 Grants: My Fake Org PATH (SSO-R10), My Fake Org PATH(Outreach R10)
 CoCs: Indiana Balance of State

ClientTrack™

Questions 8 – 16: Persons served

Persons served during this reporting period:	Count
8. Number of persons contacted by PATH-funded staff this reporting period	44
9. Number of new persons contacted this reporting period in a PATH Street Outreach project	2
10. Number of new persons contacted this reporting period in a PATH Services Only project	1
11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)	3
12a. Instances of contact this reporting period prior to date of enrollment	2
12b.Total instances of contact during the reporting period	2
13. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH	0
14. Number of new persons contacted this reporting period who became enrolled in PATH	1
15. Number with active, enrolled PATH status at any point during the date range	19
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	0

Question 17: Services Provided

Type of Service	Number of people receiving service
17a. Reengagement	0
17b. Screening	0
17c. Clinical Assessment	0
17d. Habilitation/rehabilitation	0
17e. Community mental health	0
17f. Substance use treatment	0
17g. Case management	0
17h. Residential supportive services	0
17i. Housing minor renovation	0
17j. Housing moving assistance	0
17k. Housing eligibility determination	0
17l. Security deposits	0
17m. One-time rent for eviction prevention	0

ClientTrack™ Reports Page 1 of 5 12/9/2019 9:48:27 AM

- To run the **“Export”** from the report parameters screen, complete the report parameters, then click on **“Run Export”** located at the bottom right-hand corner of the screen.

ClientTrack

2020 PATH Annual Report

For help relating to this report, click the **Help** icon in the top right area of this form. For general help, click the **Help Topics** link in the top right area of this application.

Saved Report Settings

To use previously saved report settings, select the desired settings description. To save the current report settings, select **Save Settings**, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: **- SELECT -**

Date Range

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

Predefined Date Range: **Last Year**

Service Date Between: **01/01/2018** and **12/31/2018**

Organization(s)

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.

Organization(s):

- MHA in Vigo County
- MHA of Tippecanoe County
- Miami County Young Men's Christian Assoc
- Mishawaka Food Pantry
- Munice Mission
- Wily Fake Organization...

PATH Grant(s)

Check the box to limit report results by selected grants. When checked, the 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. Additionally, on this report you can only filter by PATH grants.

Grant(s):

- Filter by Grant(s)
- Wily Fake Org PATH (SSO-R10)
- Wily Fake Org PATH (Outreach R10)

PATH Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the **☑** icon to select all.

Program(s):

- Filter by Program(s)
- Wily Fake Organization SSO (PATH-R10)
- Wily Fake Organization Street Outreach (PATH-R10)

CoC Filter

Report Schedule Report **Run Export** Cancel

- The **“Export Encryption”** box will appear. Enter a password of your choice in the **“Password”** and **“Confirm Password”** field.
- Next, click **“Done”**.

Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Export Export

Password: *

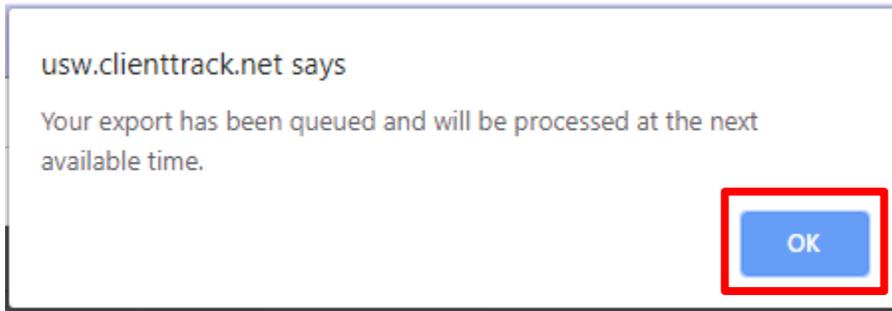
Confirm Password: *

Include Header Row in CSV File(s):

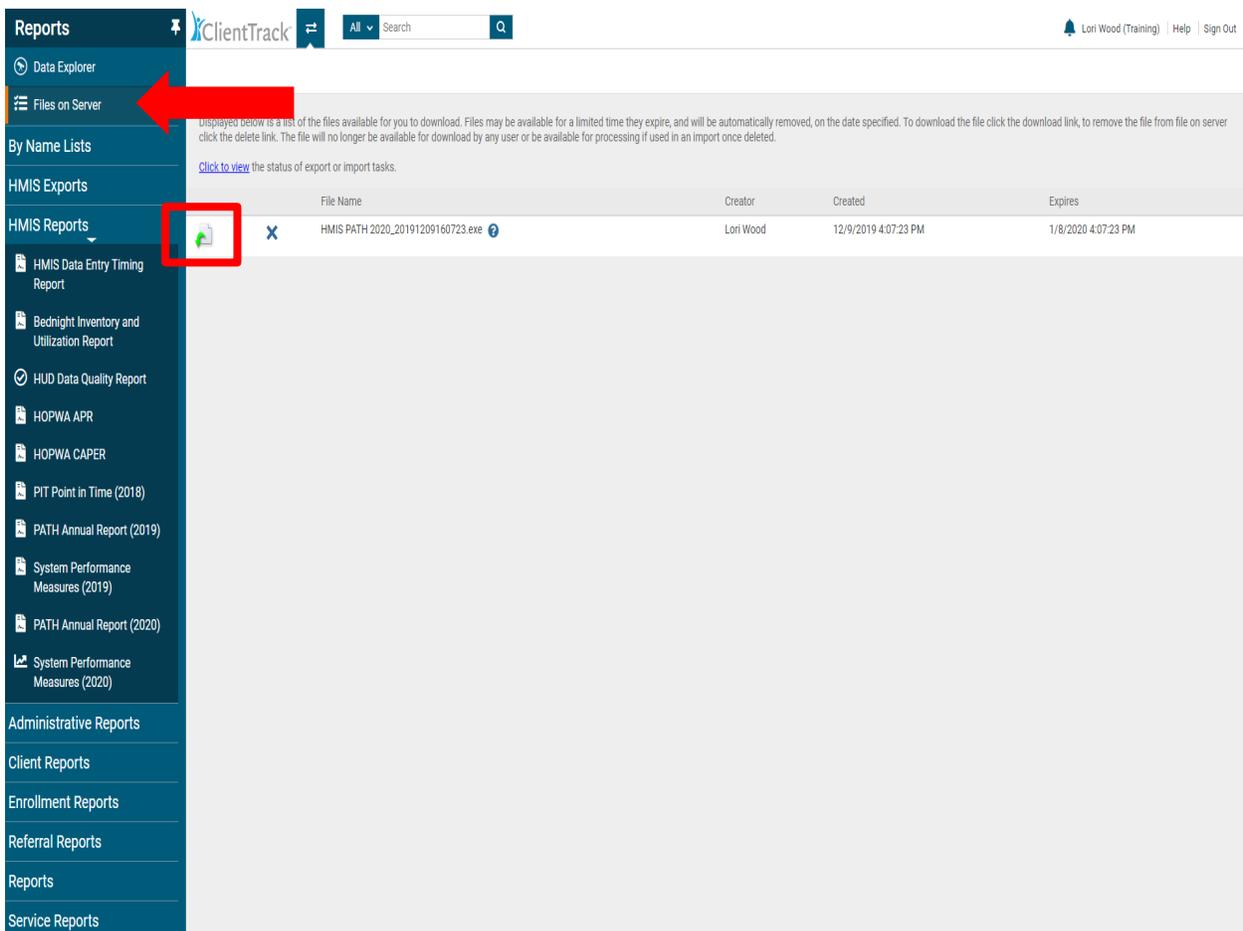
Always Quote CSV Values(s):

Done

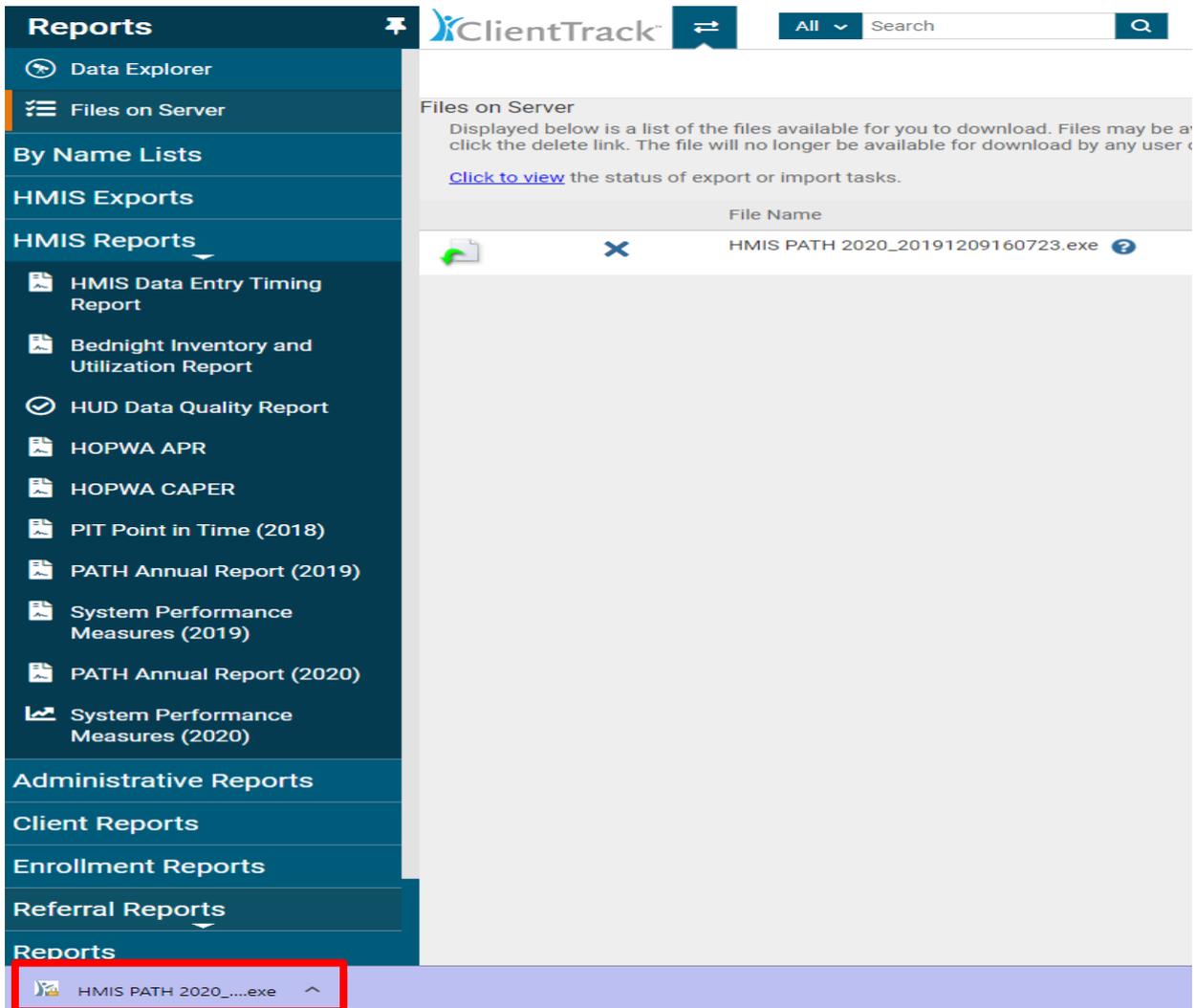
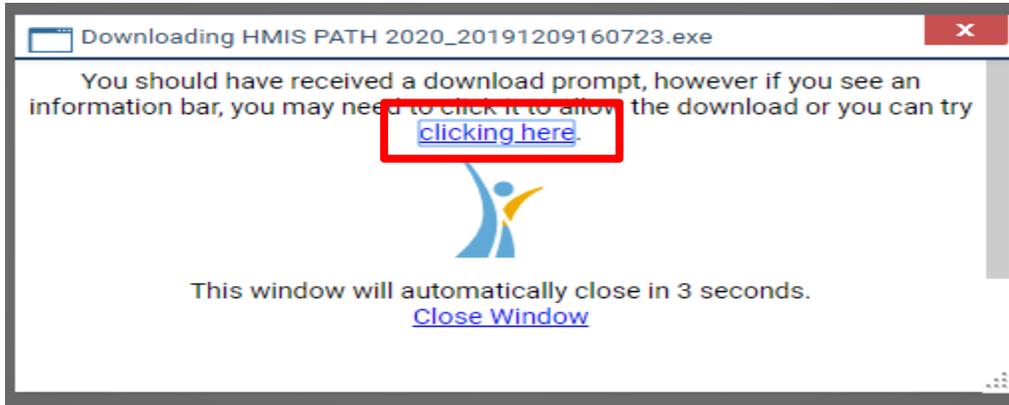
9. A pop-up box will appear informing you the report has been queued. Click **“OK”**.



10. The report will appear in the **“Files on Server”** option located at the left-hand side of the screen. To check if the report is ready, click on **“Files on Server”**. The report will appear if it is ready for viewing.
11. Next, click on the downward pointing green arrow.



12. After clicking on the downward pointing green arrow as illustrated above, a pop-up box will appear. To download the report, you can click on **“Clicking Here”** in the pop-up box or by opening the prompt on your computer in the bottom left-hand corner of the screen.



13. The **“Extract Encrypted File(s)”** pop-up window will appear. Please enter the password you chose when setting up the report parameters.
14. Next, click on the box **“I assume responsibility for the security of the extracted file(s)”**
15. Then, click **“Extract”** in the bottom right corner of the pop-up box.

