How to Run a PATH Annual Report

1. Login under **"2020 HMIS User"** and click on the **file icon** on the left-hand side menu as shown below to access the **"Reports** menu.



2. Click on the **"HMIS Reports" tab** located in the white left-hand menu on the screen. Next, click on **"PATH Annual Report (2022)"** as shown below.



- 3. Complete the report parameters as shown below.
 - a. "Date Range"
 - b. "Organization"
 - c. "PATH Grant(s)" (optional)
 - d. "PATH Program(s)" (optional)
 - e. "CoC Filter" (not necessary)
 - f. Click "Report" in the bottom right-hand corner of the screen.

)r	Q Search	Reports / ClientTrack Form
*	Files on Server	0
	> 🗅 By Name Lists	2022 PATH Annual Report
☆	HMIS Exports HMIS Reports	Date Range Indicate the time period for this report. Only records that fall within the date range you select will be included.
	HMIS Data Entry Timing Report	Predefined Date Range: Current Month 🗸
	⊘ HUD Data Quality Report	Service Date Between: * 11/01/2022 🛗 and 11/30/2022 🛗
	🖹 HOPWA APR	
	🖹 HOPWA CAPER	
	PIT Point in Time (2022)	
	🖹 PATH Annual Report (2019)	organizations you are authorized to view.
	PATH Annual Report (2020)	A Botter Way
	PATH Annual Report (2022)	Organization(s): A Dotter May A Mother's Hope
	> 🗅 Administrative Reports	Advantage Housing Inc AIDS Ministries Elkhart
	> 🗅 Client Reports	AIDS Resource Group Evansville
	> 🗀 Enrollment Reports	

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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.



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)
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CoC Filter

You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so).

Note: This filter only applies to the initial client universe.

If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.

CoC (optional): SELECT	
	~



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

X	Q Search	2022 PATH Annual Report			
*	Files on Server	I < 1 of 5 > ▶ ↓			
	 Piles of Server By Name Lists HMIS Exports HMIS Reports HMIS Data Entry Timing Rep. HUD Data Quality Report 	HMIS PATH Annual Report Excel HMIS PATH Annual Report Excel Data 11/1/2022 to 11/30/2022 PDF Organizations: My Fake Organization Programs: My Fake Organization PATH (SO-F Grants: Core			
	HOPWA APRHOPWA CAPER	CoCs: Questions 8 – 16: Persons served			
	 PIT Point in Time (2022) PATH Annual Report (2019) 	Persons served during this reporting period: Count 8. Number of persons contacted by PATH-funded staff this reporting period 0 9. Number of concentrated by an environment of the period 0			
	PATH Annual Report (2020)	10. Number of new persons contacted this reporting period in a PATH Survices Only project 0			
	PATH Annual Report (2022)	11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted) 0			
	> 🗅 Administrative Reports	12a. Instances of contact this reporting period prior to date of enrollment 0			
	> 🗀 Client Reports	12b. Total instances of contact during the reporting period 0 13a. Number of new persons contacted this reporting period who could not be enrolled because of			
	> 🗅 Enrollment Reports	ineligibility for PATH 0			
	> 🗀 Referral Reports	provider was unable to locate the client 0			
	> 🗀 Reports	14. Number of new persons contacted this reporting period who became enrolled in PATH 0			
?	> 🗅 Service Reports	16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period 0			
	N C3 Other Benerte				

5. 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 as shown below.

))	Home Search	Reports / ClientTrack Form
*	E Files on Server	- D
	> 🗅 By Name Lists	2022 PATH Annual Report
	> 🗀 HMIS Exports	Grant(s): Filter by Grant(s)
☆	✓ ☐ HMIS Reports	
	HMIS Data Entry Timing Report	PATH Program(s)
	 HUD Data Quality Report 	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
	🖹 HOPWA APR	programs should be included in the report by selecting each program separately, or click the ダ icon to select all.
	HOPWA CAPER	Program(s): Filter by Program(s)
	🖹 PIT Point in Time (2022)	
	PATH Annual Report (2019)	
	PATH Annual Report (2020)	CoC Filter You may optionally identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so).
	PATH Annual Report (2022)	Note: This filter only applies to the initial client universe.
	> 🗅 Administrative Reports	If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.
	> 🗀 Client Reports	
	> 🗅 Enrollment Reports	State / Territory Filter for CoC: SELECT V
	> 🗀 Referral Reports	CoC (optional): SELECT V
	> 🗅 Reports	
ନ	> 🗅 Service Reports	🔒 Report 🛛 🖹 Schedule Rep. t 🔹 Run Export 💭 Cancel
ttps://cliei	nttrack.eccovia.com/main/age.aspx/inline=top#	

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

X	Home Search	Reports / ClientTrack Form			
-	⅔ Files on Server	[3		
	 D By Name Lists HMIS Exports HMIS Reports HMIS Data Entry Timing Report 	2022 PATH Annual Rep Check the box to limit report re programs should be included i	Export Encryption		
	 HUD Data Quality Report HOPWA APR HOPWA CAPER PIT Point in Time (2022) PATH Appual Report (2019) 	HUD Data Quality Report HOPWA APR HOPWA CAPER PIT Point in Time (2022) PATH Annual Report (2019) PATH Annual Report (2020) PATH Annual Report (2022) ministrative Reports ent Reports rollment Reports ferral Reports ports rvice Reports	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 <i>always</i> be enclosed in double-quotes.		
	 PATH Annual Report (2020) PATH Annual Report (2022) PATH Annual Report (2022) Administrative Reports Client Reports Enrollment Reports Referral Reports 		Encrypt Export: Image: Confirm Password:* Confirm Password:* Image: Confirm Password:* Include Header Row in CSV File(s): Image: Confirm Password:* Always Quote CSV Values(s): Image: Confirm Password:*		
<u></u>	C Reports Service Reports		Done		

7. A pop-up box will appear informing you the report has been queued. Click "OK".



 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. To download the file, click anywhere on "HMIS PATH 2022" file name as shown below.

X	Q Search	Reports / ClientTrack Form	
*	Files on Server		
	> 🗅 By Name Lists	Files on Server	
	> 🗅 HMIS Exports	Displayed below is a list of the files available for you to download. Files with an expiration date will be au	itomatically removed oi
☆	✓ ☐ HMIS Reports	download it. To remove the file, click the delete link. Once deleted, the file will no longer be available for used in an import	download by any user a
	HMIS Data Entry Timing Report	used in an import.	
	⊘ HUD Data Quality Report	View the status of export or import tasks.	
	🔁 HOPWA APR		Created
	🖹 HOPWA CAPER	HMIS PATH 2022_20221110191452_TaskID_154680.exe Daniella Jordan Gonzales	11/10/2022 7:14 PM
	PIT Point in Time (2022)		
	🖹 PATH Annual Report (2019)		

8. A pop-up window will appear, and the Export will show as a download in the bottom left corner of the screen as shown below. Click on the **"hmis path2022.exe"** to open the download.

)r	Q Search	Reports
*	🛞 Data Explorer	
.	E Files on Server	Files on Server
	> 🗀 By Name Lists	Displayed below is a list of the files available for you to download. Files with an expiration date wil
☆	> 🗀 HMIS Exports	download it. To remove the file, click the delete link. Once deleted, the file will no longer be availab
	✓ ➡ HMIS Reports	Downloading HMIS PATH
	HMIS Data Entry Timing Report	View the status of 2022_20221110191452_TaskID_154680.exe
	HUD Data Quality Report	
	HOPWA APR	HMIS APR_CAI You should have received a download prompt, however if you see an information has you may peed to aligh it to align the download as you
	HOPWA CAPER	Validation_202 Information bar, you may need to click it to allow the download of you can try clicking here
	PIT Point in Time (2022)	HMIS APR 2022
	PATH Annual Report (2019)	
	PATH Annual Report (2020)	Load_2022111
	PATH Annual Report (2022)	
	> 🗅 Administrative Reports	HMIS PATH 2022_20221110191452_TaskID_154680.exe Daniella Jordan Gonza
	> 🗀 Client Reports	
	> 🛅 Enrollment Reports	
0	> 🗀 Referral Reports	
🔏 hr	mis path 2022_20exe	



9. A pop-up window will show called "Windows protected your PC". Click on "More Info" as shown below.

10. Another window will pop-up with two options: "Run anyway" and "Don't run". To move forward with the download, click **"Run Anyway".**

		×	
	Windows protected your PC		
V	Microsoft Defender SmartScreen prevented an unrecognized app from starting. Running this app might put your PC at risk.		
ov o	App: hmis path 2022_20221110191452_taskid_154680 (2).exe		e
po	Publisher: Unknown publisher		
sL			
_c			e
_2			
20			e
-			
_0 21			e
21	Run anyway Don't ru	in	
12			e

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

C A clianttrack accouia com/MainDaga acny2lalina-tan	
A 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\DJordan\Downloads	
View files after extracting	
If the file(s) already exist Overwrite silently ~	
Show Contents Extract Cancel	
	 A distant and a converte source if the bill Blance serve (2 billion at the bill blance serve (2 billion at the billio

14. For additional assistance please email the

HMISHelpDesk@ihcda.in.gov

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October 2021