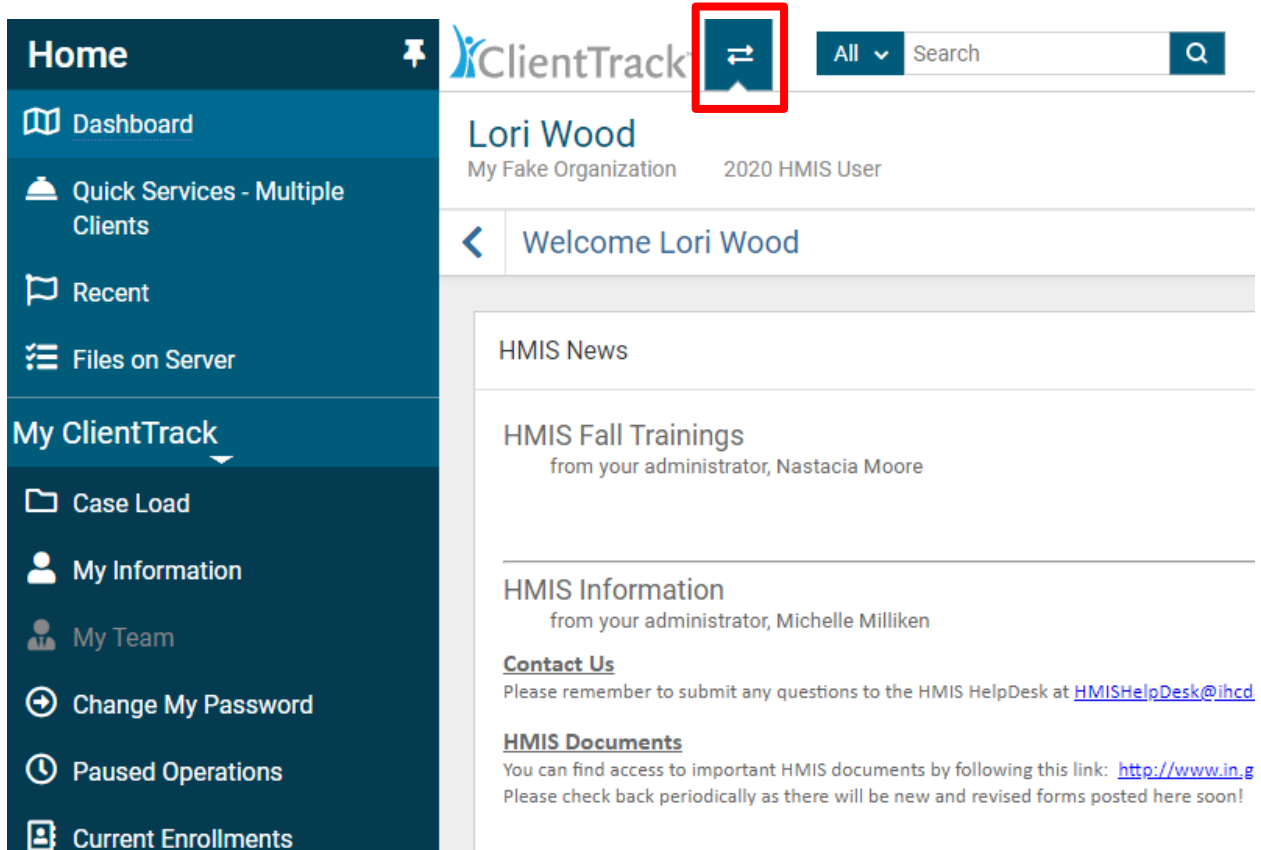
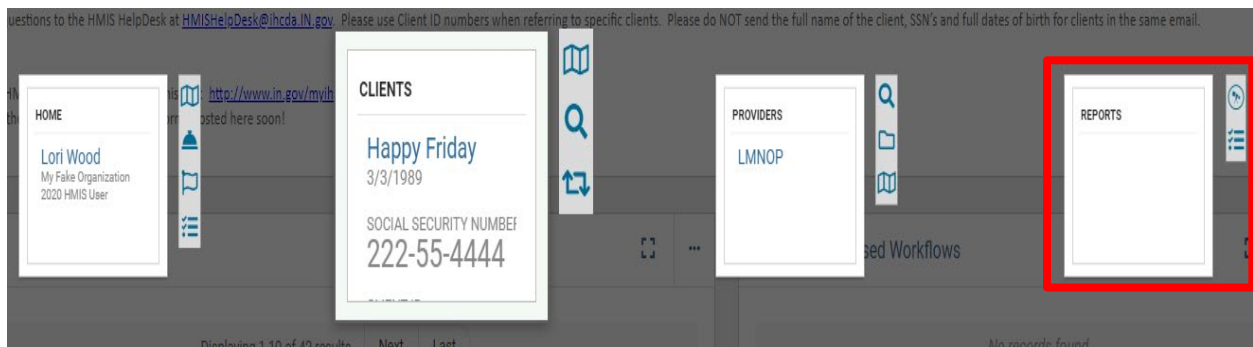


How to Run a PATH Annual Report

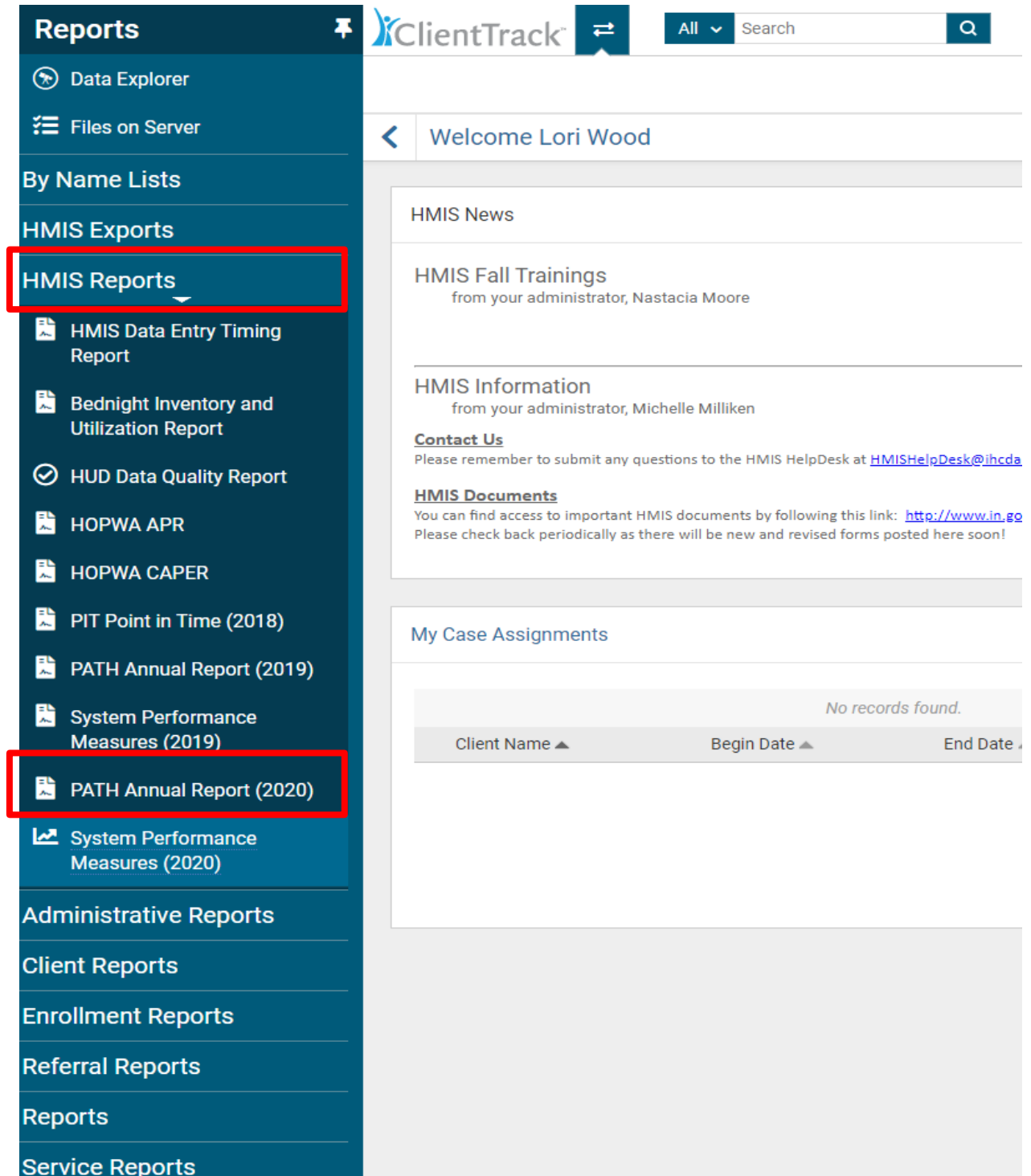
1. From the **"HOME"** workspace, click on the double arrow icon to the right of the ClientTrack logo at the top of the page.



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 Reports workspace. The left-hand menu is visible, with the following items: Reports, 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 shows a welcome message for Lori Wood, followed by HMIS News, HMIS Fall Trainings, HMIS Information, Contact Us, and HMIS Documents. Below this is a section for My Case Assignments, which currently shows no records found.

Reports ClientTrack™ All Search

Welcome Lori Wood

HMIS News

HMIS Fall Trainings
from your administrator, Nastacia Moore

HMIS Information
from your administrator, Michelle Milliken

Contact Us
Please remember to submit any questions to the HMIS HelpDesk at HMISHelpDesk@ihcda

HMIS Documents
You can find access to important HMIS documents by following this link: <http://www.in.go>
Please check back periodically as there will be new and revised forms posted here soon!

My Case Assignments

No records found.

Client Name ▲	Begin Date ▲	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.

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

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: **Current Month**

Service Date Between: 12/01/2019 and 12/31/2019

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

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)**

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)**

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.

State Filter for CoC: **- SELECT -**

CoC (optional): **- SELECT -**

Report | Schedule Report | Run Export | Cancel

5. 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

6. 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.

Reports ClientTrack All Search

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
- ☒ Muncie Mission
- ☒ Muncie Police Department

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)
- ☒ Muncie Police Department (SSO-R10)
- ☒ Muncie Police Department (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)
- ☒ Muncie Police Department SSO (PATH-R10)
- ☒ Muncie Police Department Street Outreach (PATH-R10)

CoC Filter

Report Schedule Report **Run Export** Cancel

7. The **“Export Encryption”** box will appear. Enter a password of your choice in the **“Password”** and **“Confirm Password”** field.
8. 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.

Include Header Row in CSV: ☒

File(s):

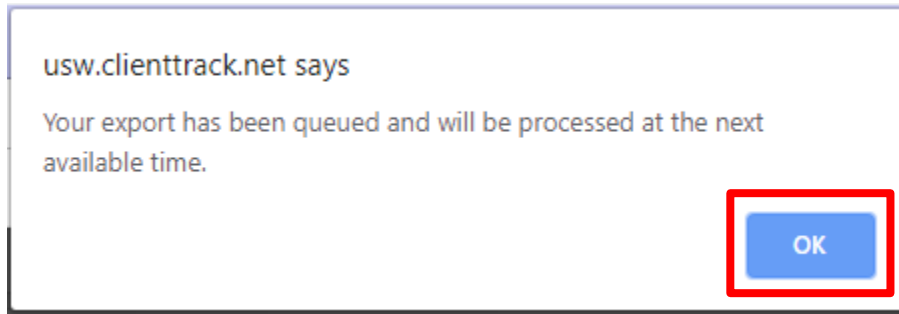
Always Quote CSV Values(s): ☐

Password: *

Confirm Password: *

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.

Reports ClientTrack All Search

Lori Wood (Training) | Help | Sign Out

Data Explorer

Files on Server

By Name Lists

HMIS Exports

HMIS Reports

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)

System Performance Measures (2020)

Administrative Reports

Client Reports

Enrollment Reports

Referral Reports

Reports

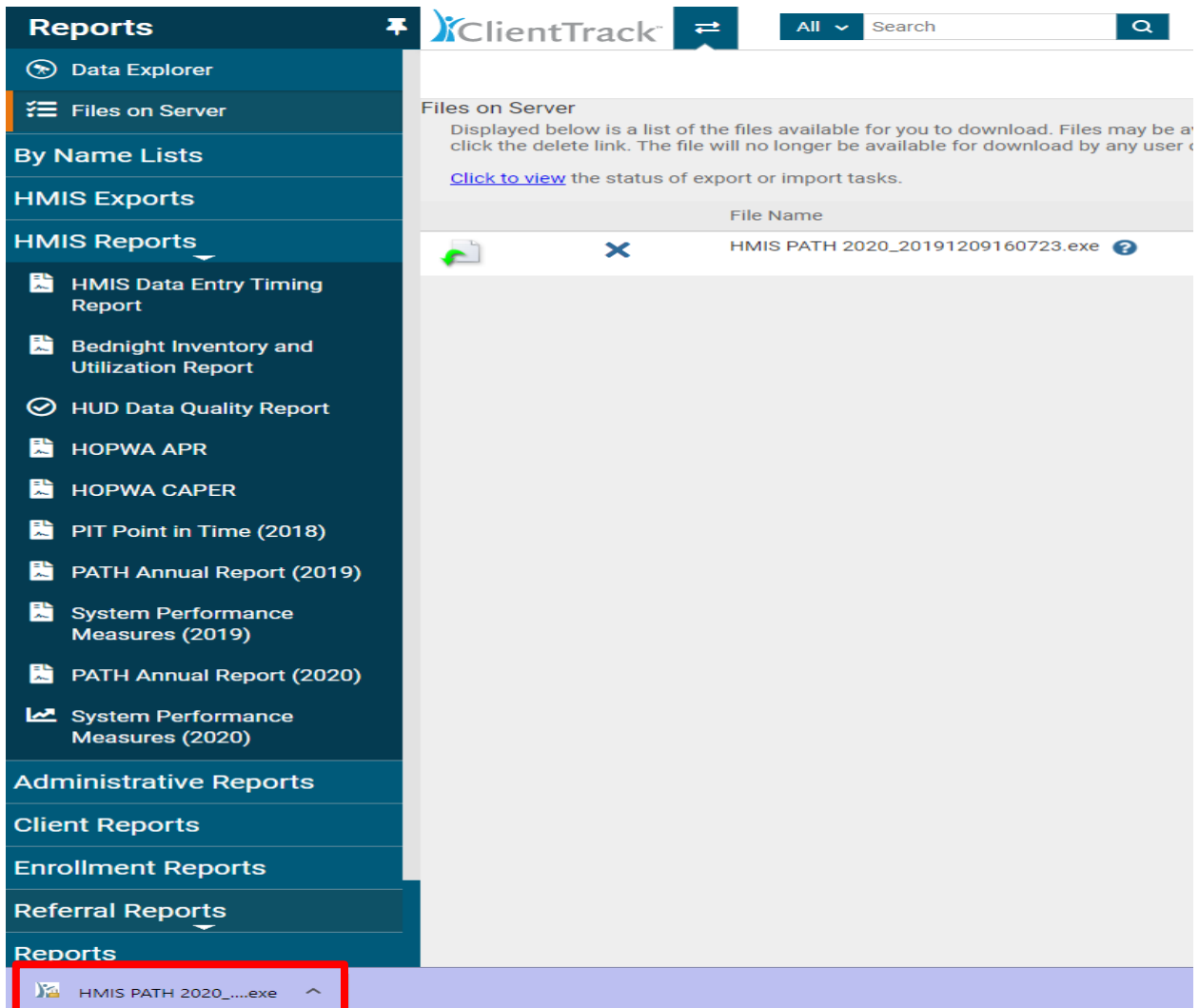
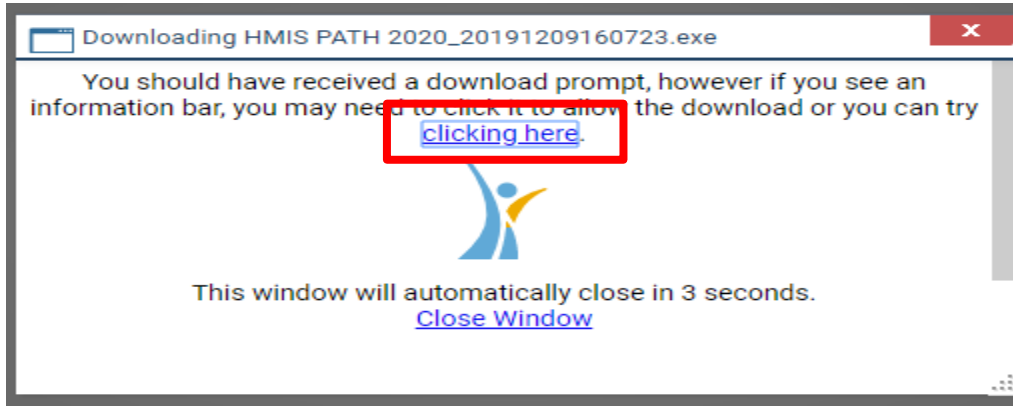
Service Reports

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
HMIS PATH 2020_20191209160723.exe	Lori Wood	12/9/2019 4:07:23 PM	1/8/2020 4:07:23 PM

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.

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\LWood\Downloads

☒ View files after extracting

If the file(s) already exist **Overwrite silently**

[Show Contents](#) **Extract** Cancel