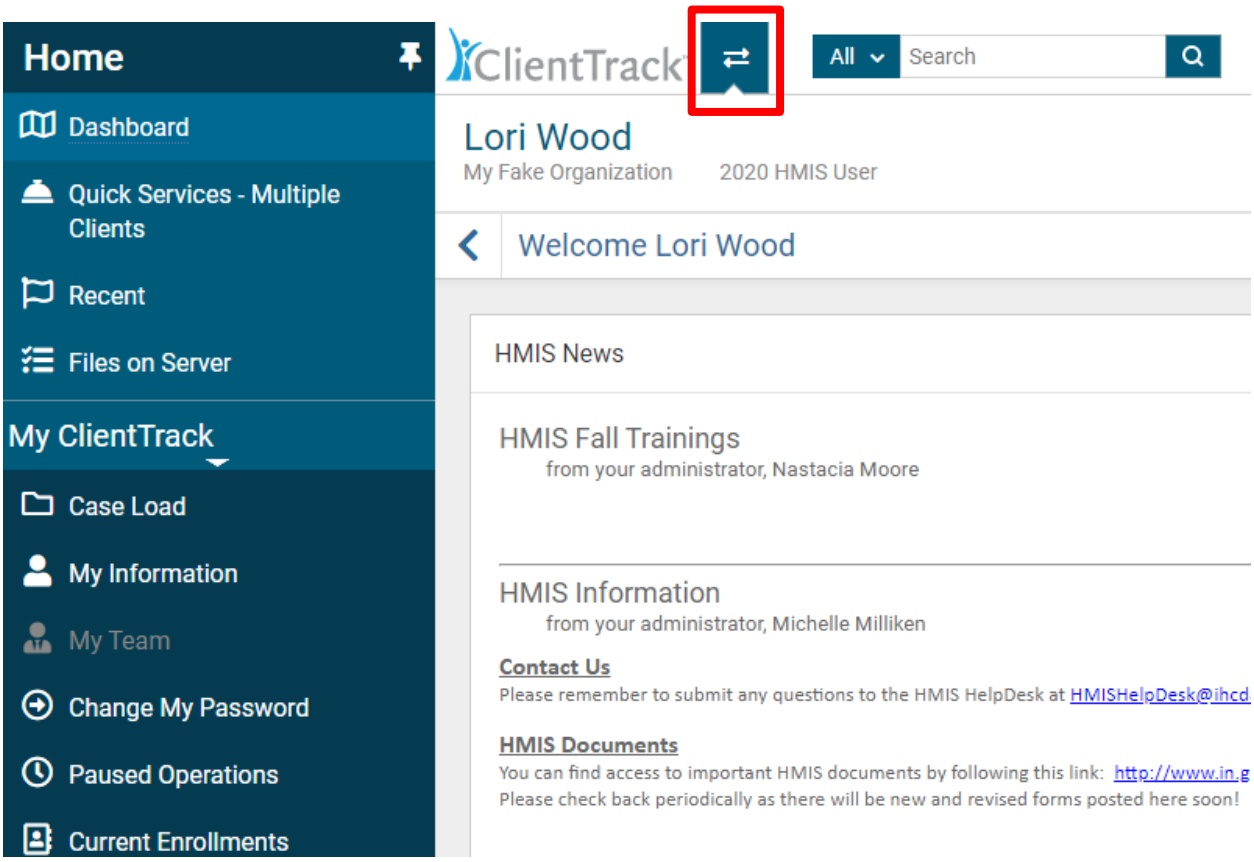
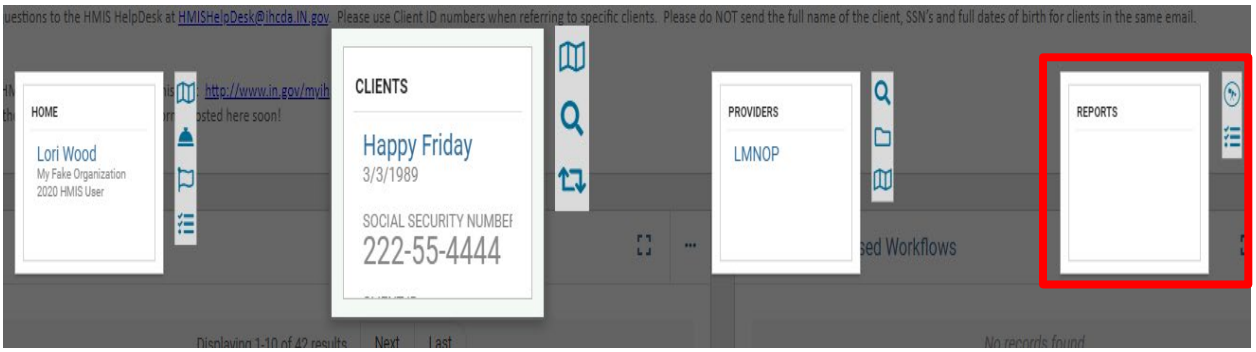
How to Run a PATH Annual Report

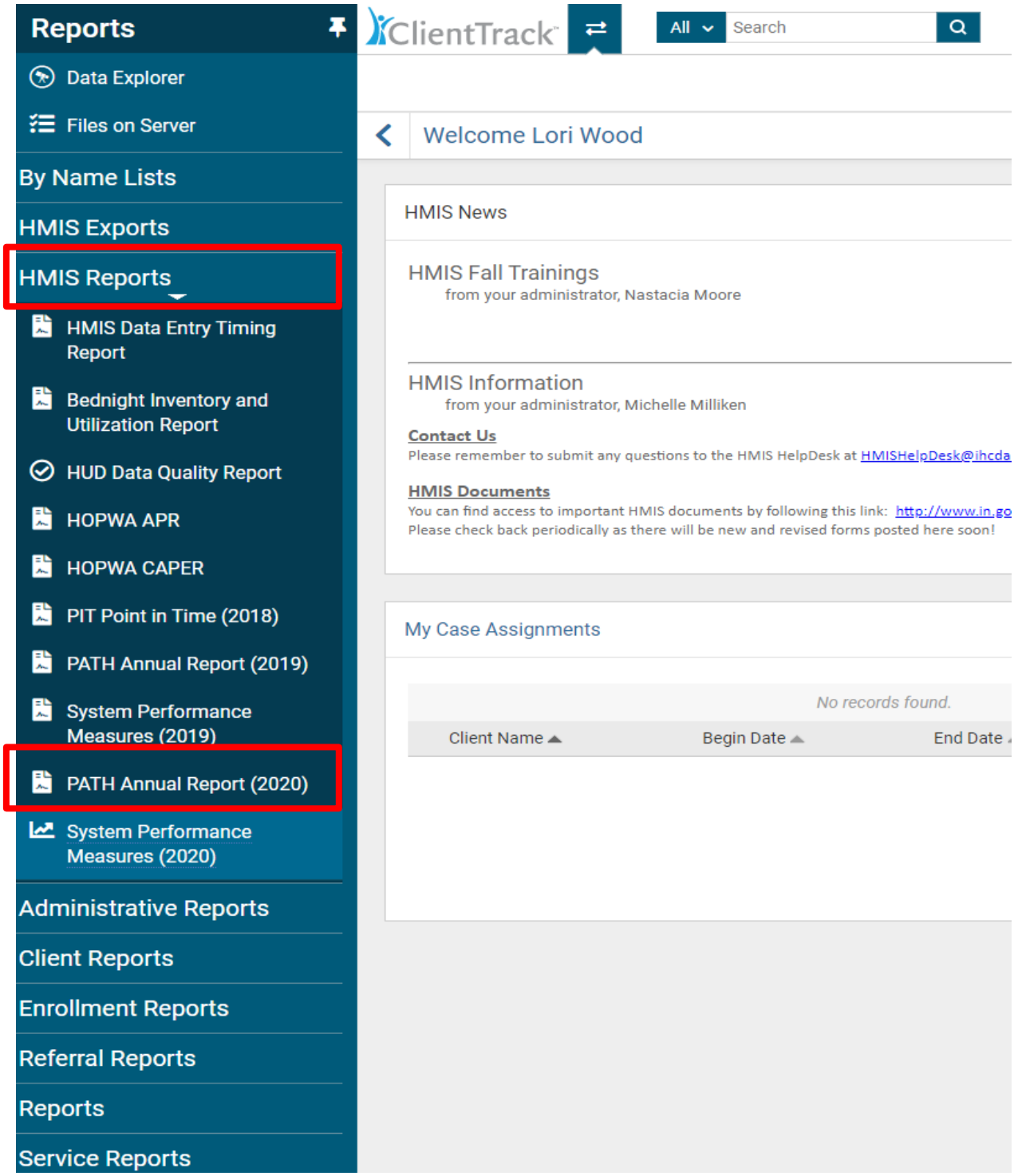
1. From the **"HOME"** workspace, click on the double arrow icon to the right of the ClientTrack logo at the top of the page.



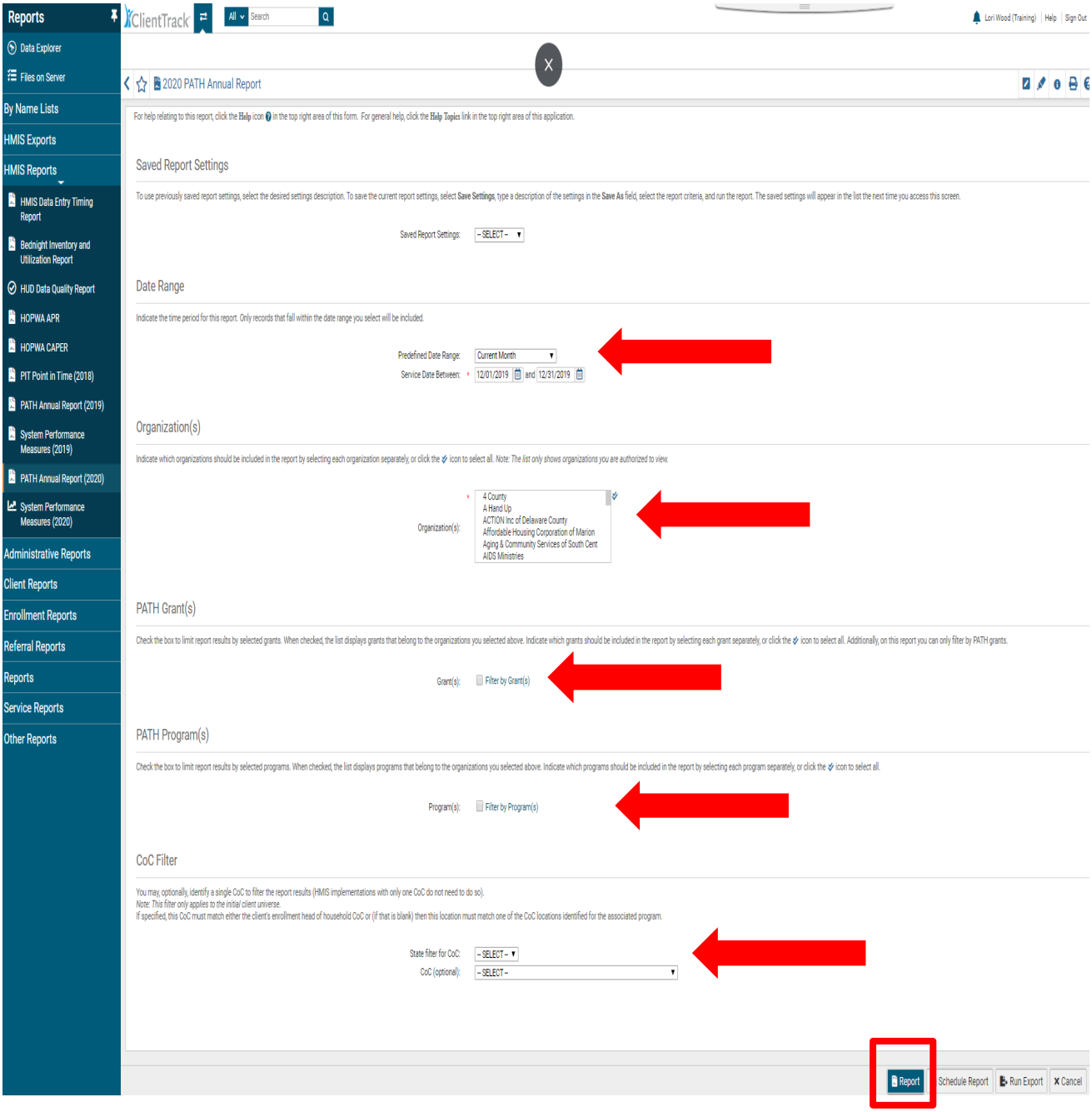
2. You are now on the **"Workspace"** floating menu. Toggle to the right by clicking on the arrow located on the right side of your screen until you see the **"REPORTS"** box. Click on the **"REPORTS"** box to access the **"REPORTS"** workspace.



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

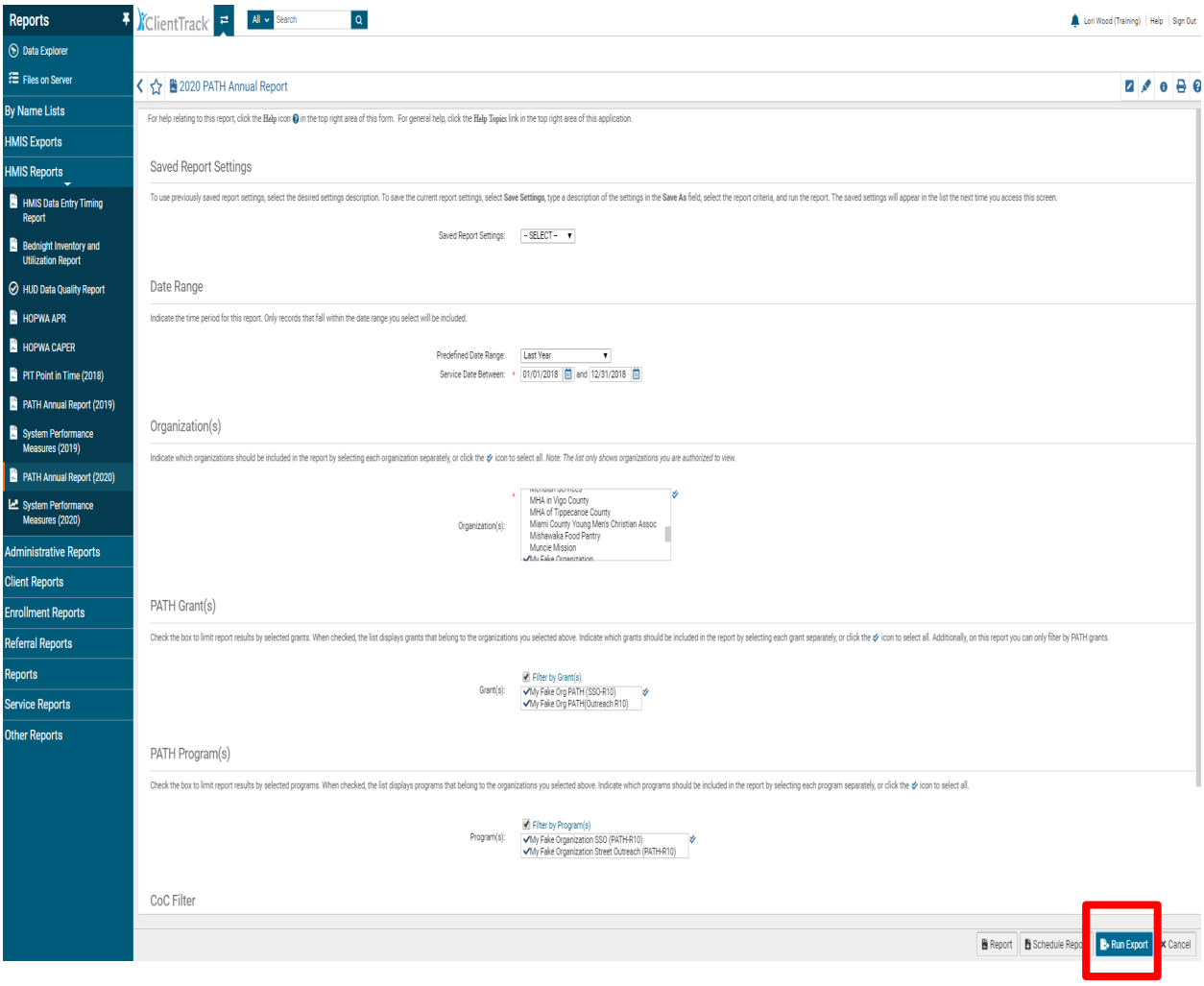


4. Complete the report parameters.
    a. **“Date Range”**
    b. **“Organization”**
    c. **“PATH Grant(s)”**
    d. **“PATH Program(s)”**
    e. **“CoC Filter”**
    f. Click **“Report”** in the bottom right-hand corner of the screen.

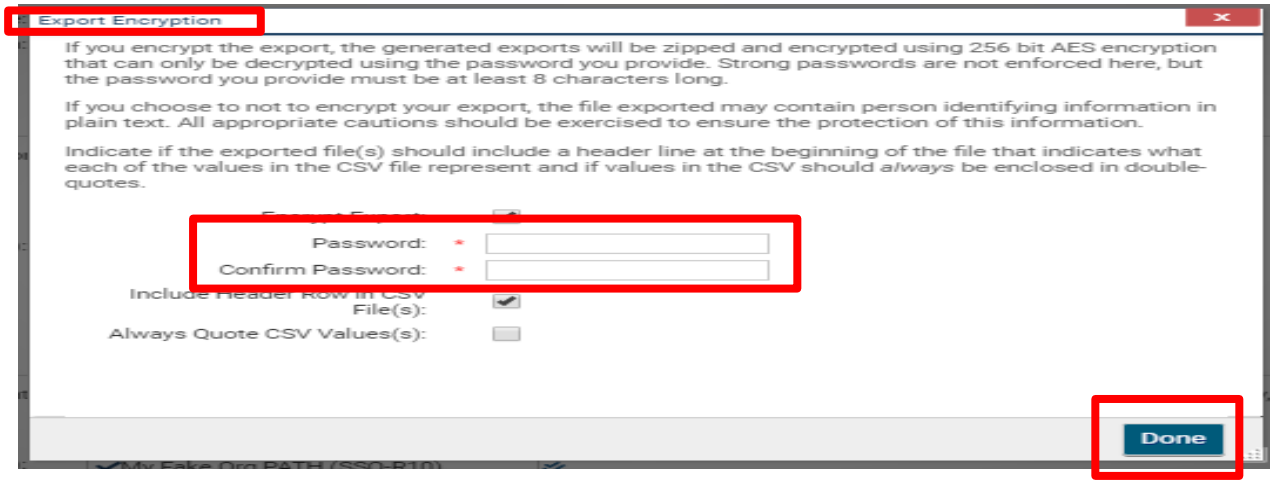


5. The report will run and appear on the screen as seen below. You can export the report by clicking on icon with a small green downward arrow at the top of the page and then clicking on the export format. (**Excel, Excel Data, PDF or Word**).

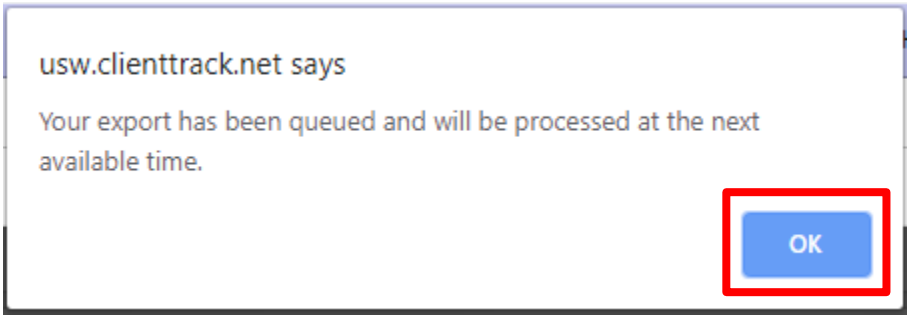
6. To run the **"Export"** from the report parameters screen, complete the report parameters, then click on **"Run Export"** located at the bottom right-hand corner of the screen.



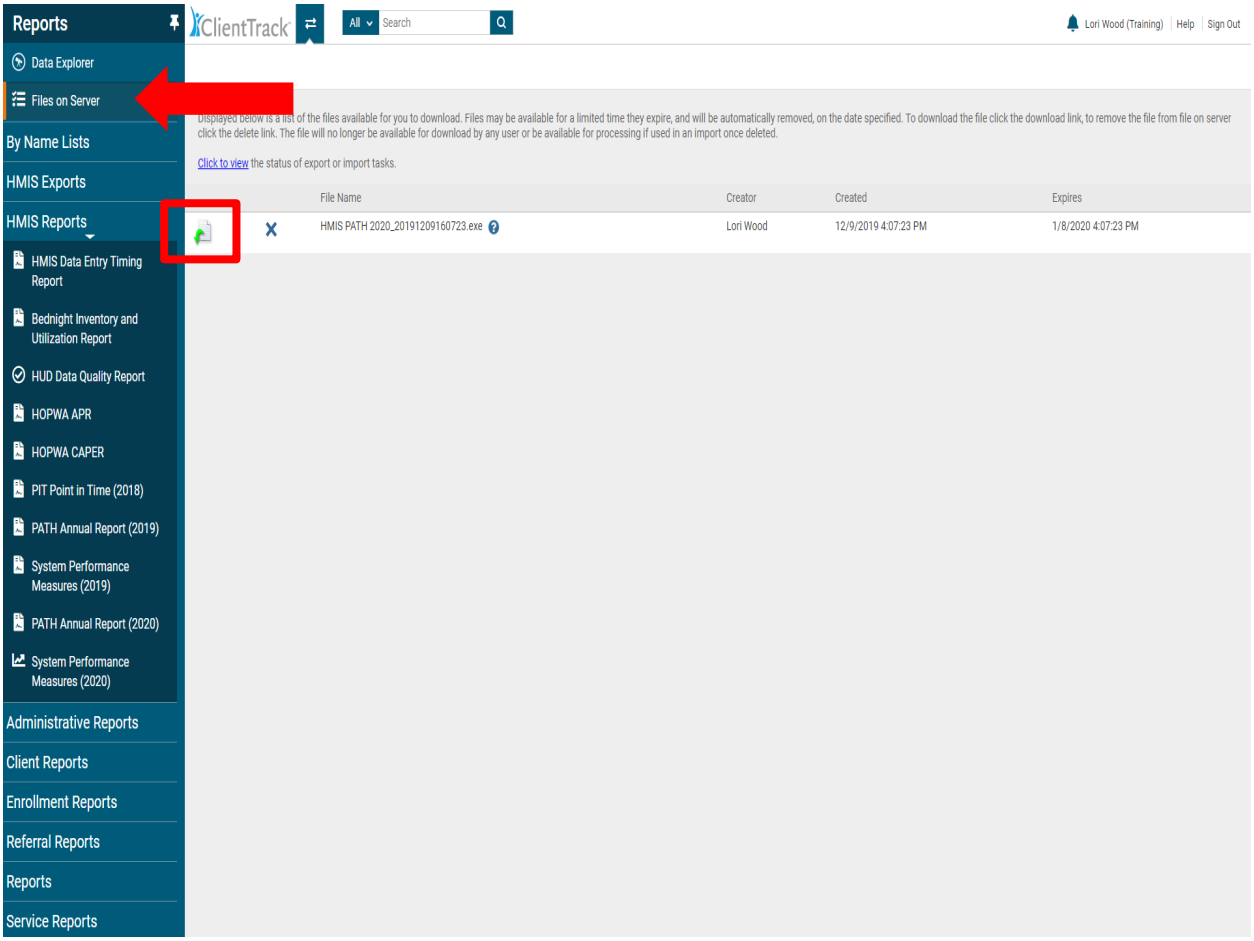
7. The **"Export Encryption"** box will appear. Enter a password of your choice in the **"Password"** and **"Confirm Password"** field.
8. Next, click **"Done"**.



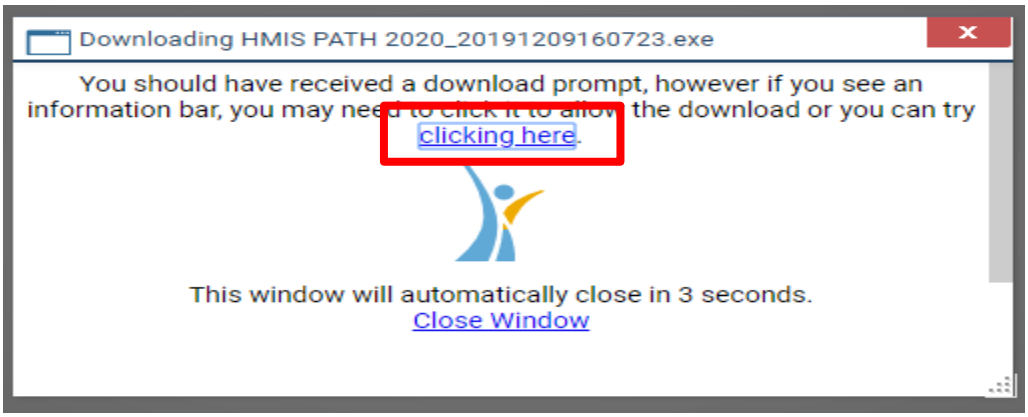
9. A pop-up box will appear informing you the report has been queued. Click **"OK"**.

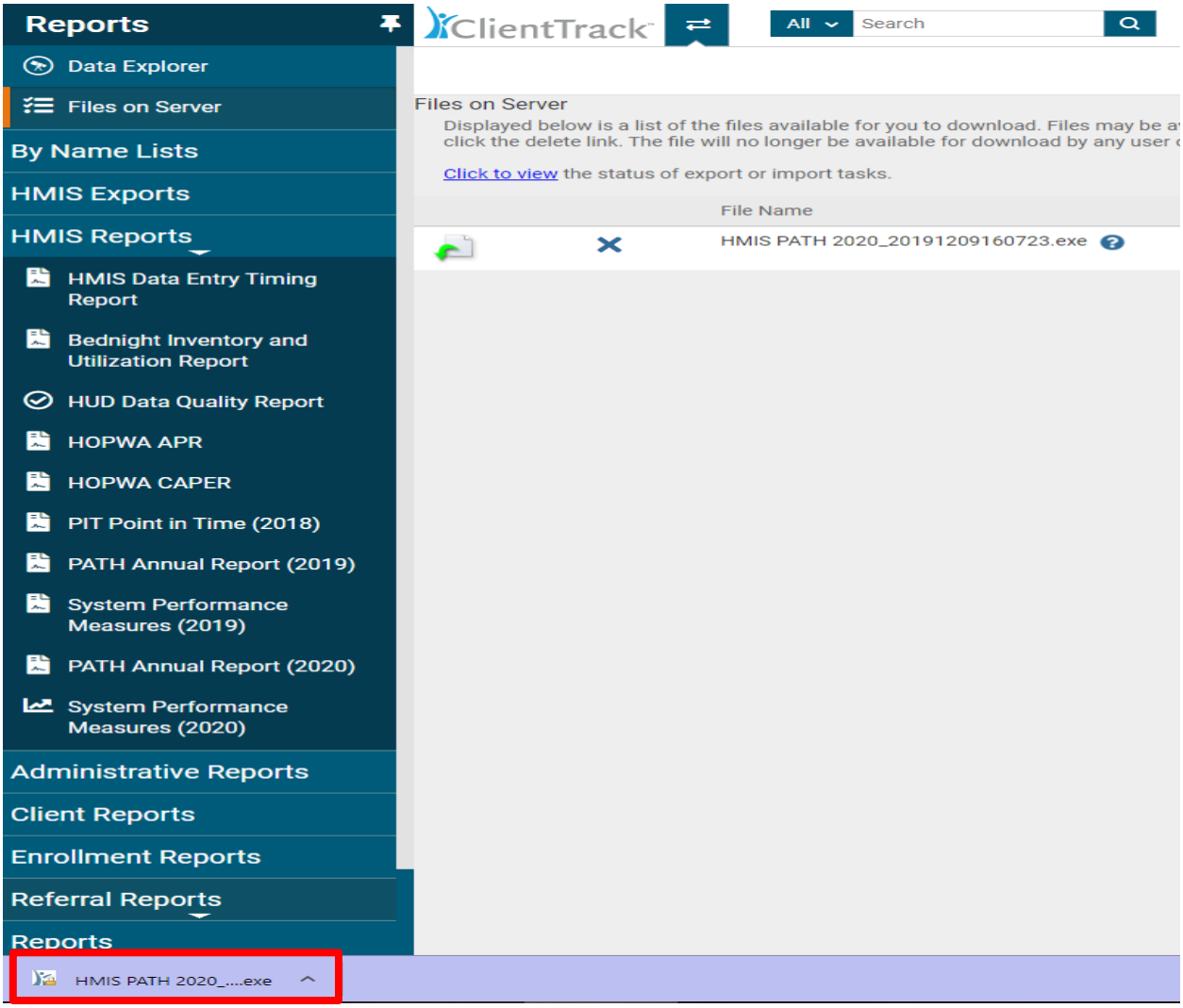


10. The report will appear in the **"Files on Server"** option located at the left-hand side of the screen. To check if the report is ready, click on **"Files on Server"**. The report will appear if it is ready for viewing.
11. Next, click on the downward pointing green arrow.



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.