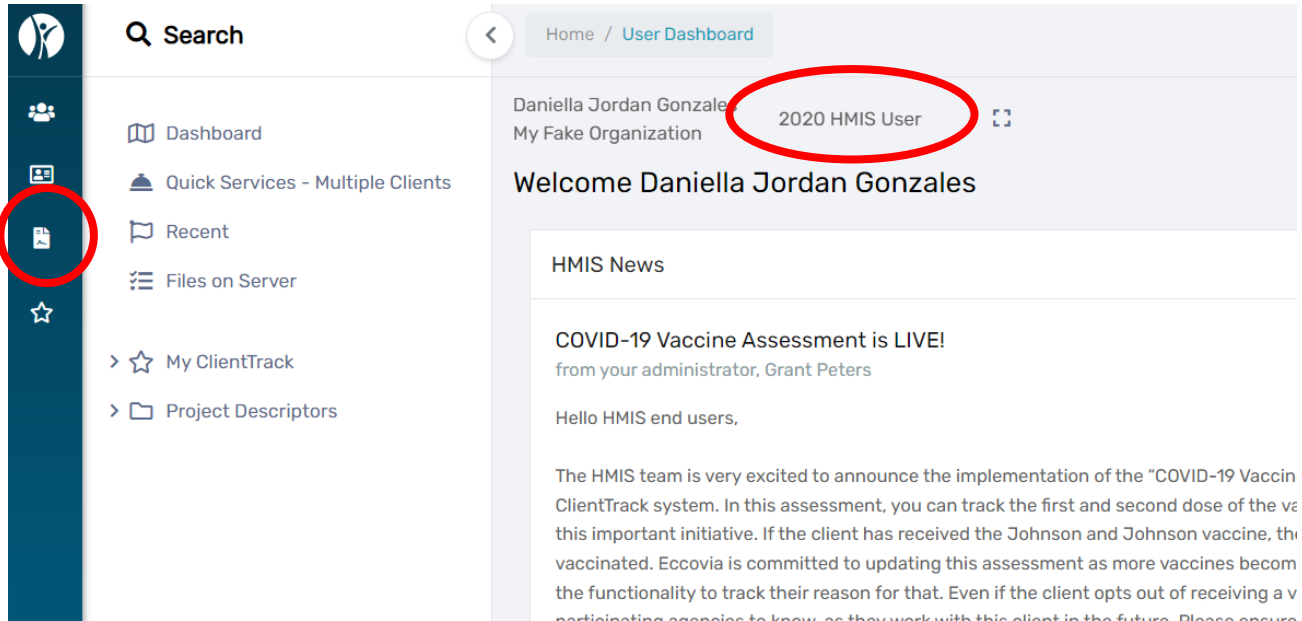
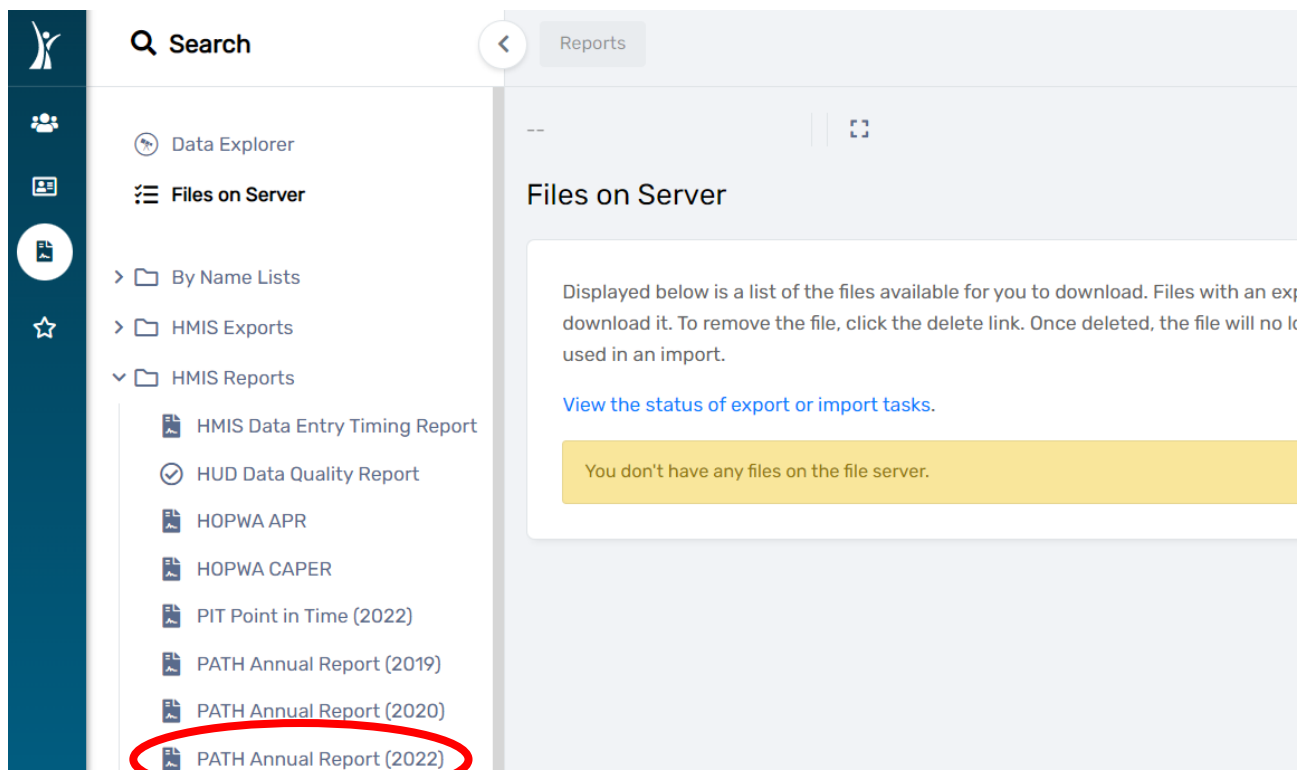


How to Run a PATH Annual Report

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.

The screenshot shows the '2022 PATH Annual Report' form. The left sidebar contains a search bar and a list of reports under 'HMIS Reports', with 'PATH Annual Report (2022)' selected. The main form area has two sections highlighted with red boxes:


- Date Range:** This section includes a dropdown for 'Predefined Date Range' set to 'Current Month' and a 'Service Date Between' field with dates '11/01/2022' and '11/30/2022'.
- Organization(s):** This section includes a list of organizations: 'A Better Way', 'A Mother's Hope', 'Advantage Housing Inc', 'AIDS Ministries Elkhart', and 'AIDS Resource Group Evansville'. A blue checkmark icon is visible next to the list.

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:

CoC (optional):

 Report

 Schedule Report

 Run Export

Cancel

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).

2022 PATH Annual Report

HMIS PATH Annual Report

11/1/2022 to 11/30/2022

Organizations: My Fake Organization
Programs: My Fake Organization PATH (SO-F
Grants:
CoCs:

Questions 8 – 16: Persons served

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

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.

2022 PATH Annual Report

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)

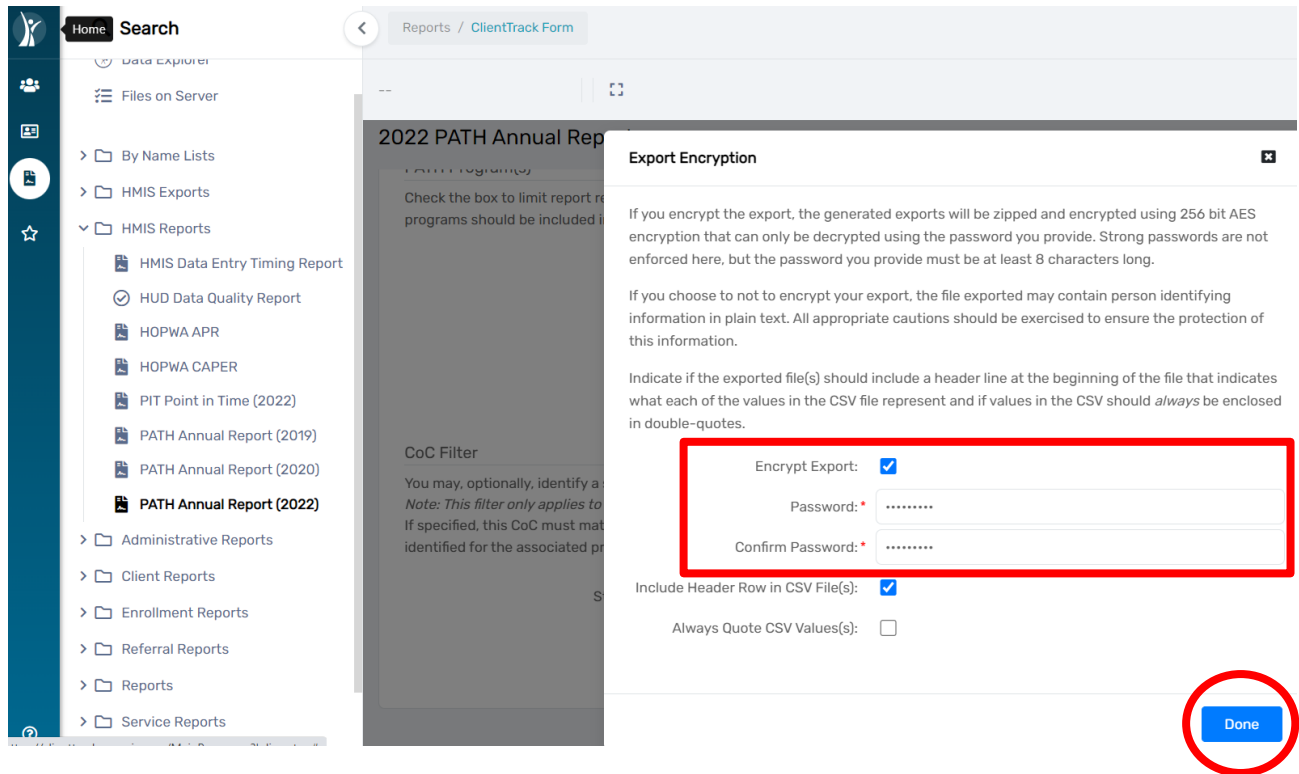
CoC Filter
You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so).
Note: This filter only applies to the initial client universe.
If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.

State / Territory Filter for CoC: -- SELECT --

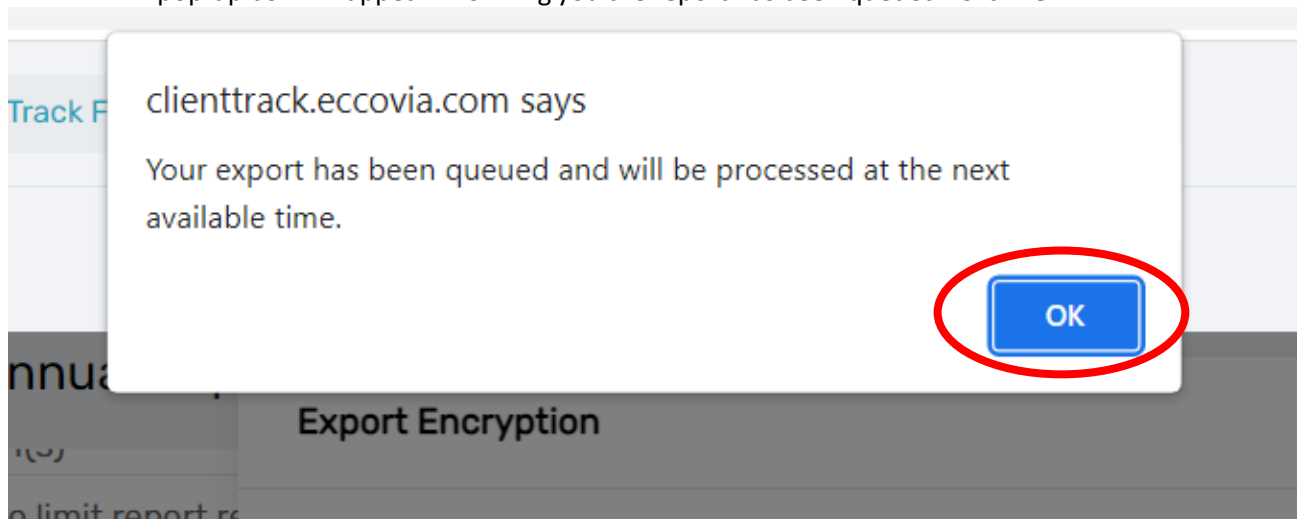
CoC (optional): -- SELECT --

Report Schedule Rep Run Export Cancel

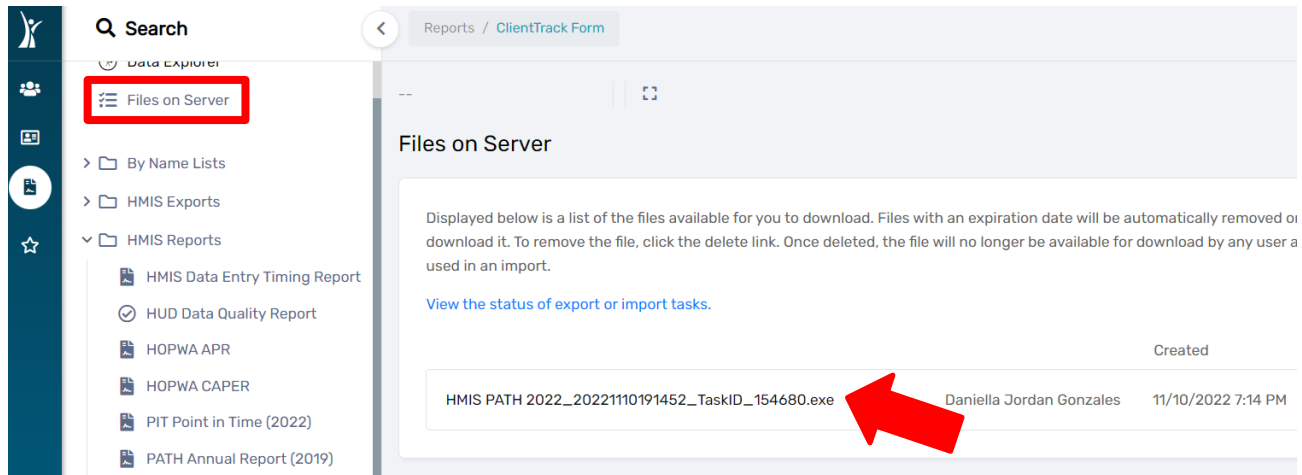
- The **“Export Encryption”** box will appear. Enter a password of your choice in the **“Password”** and **“Confirm Password”** field. Next, click **“Done”**.



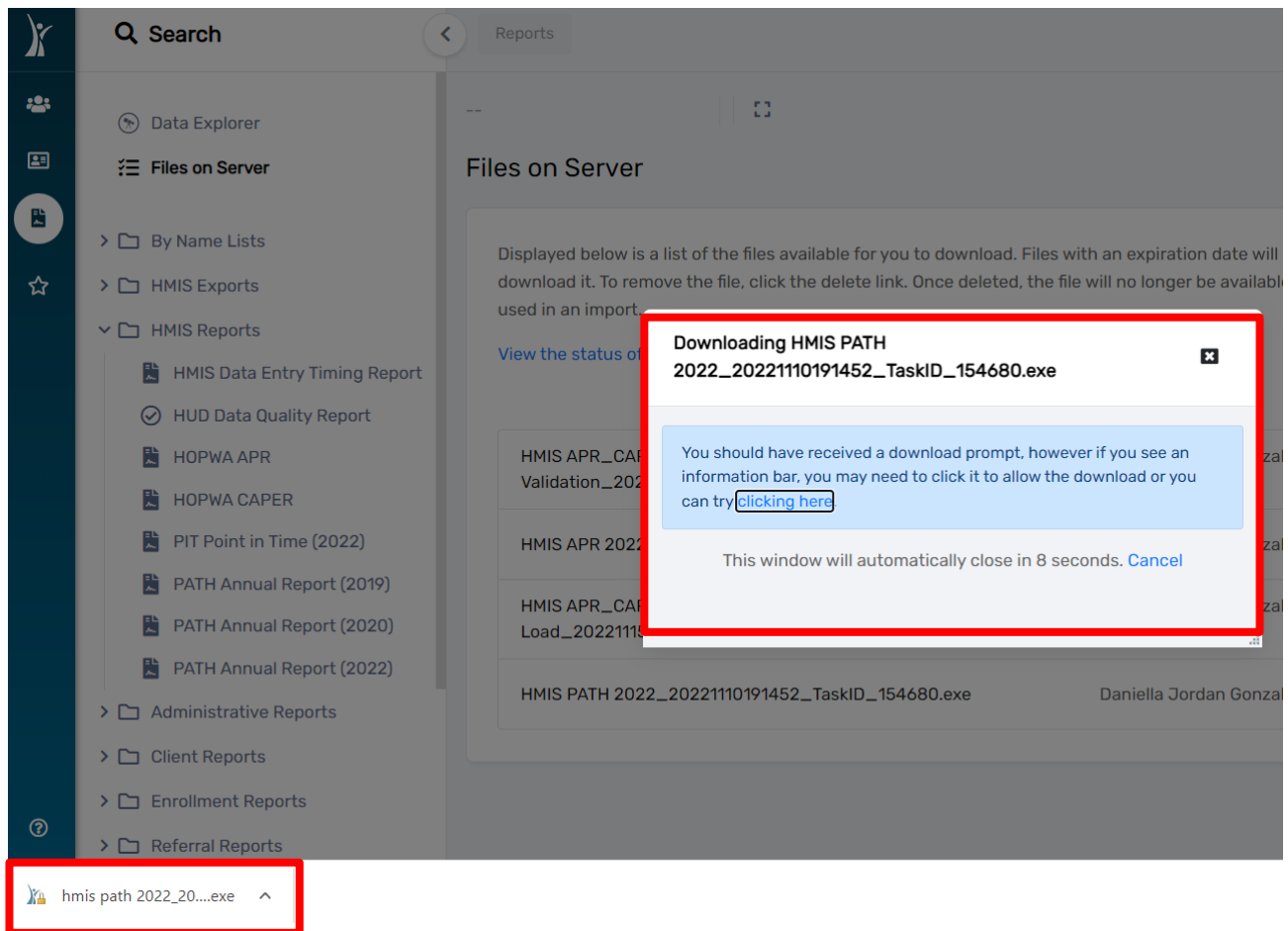
- A pop-up box will appear informing you the report has been queued. Click **“OK”**.



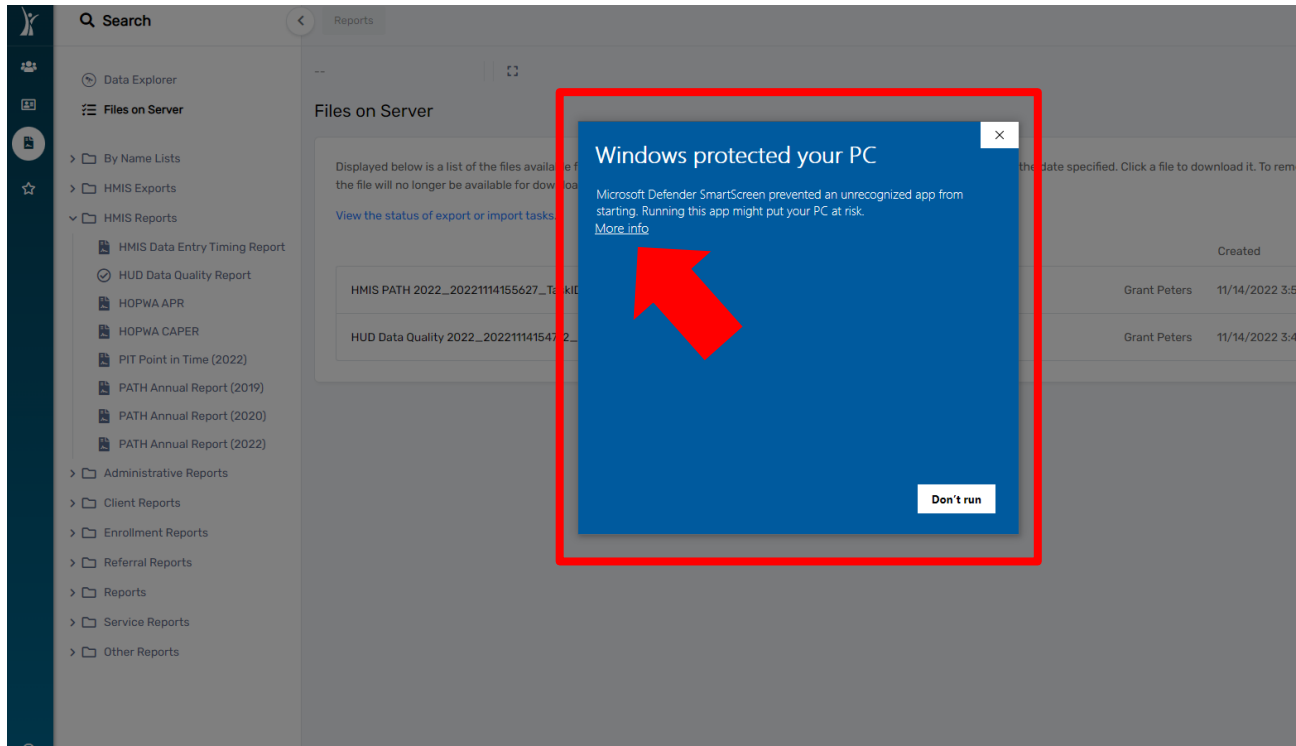
- The report will appear in the **“Files on Server”** option located at the left-hand side of the screen. To check if the report is ready, click on **“Files on Server”**. The report will appear if it is ready for viewing. To download the file, click anywhere on **“HMIS PATH 2022”** file name as shown below.



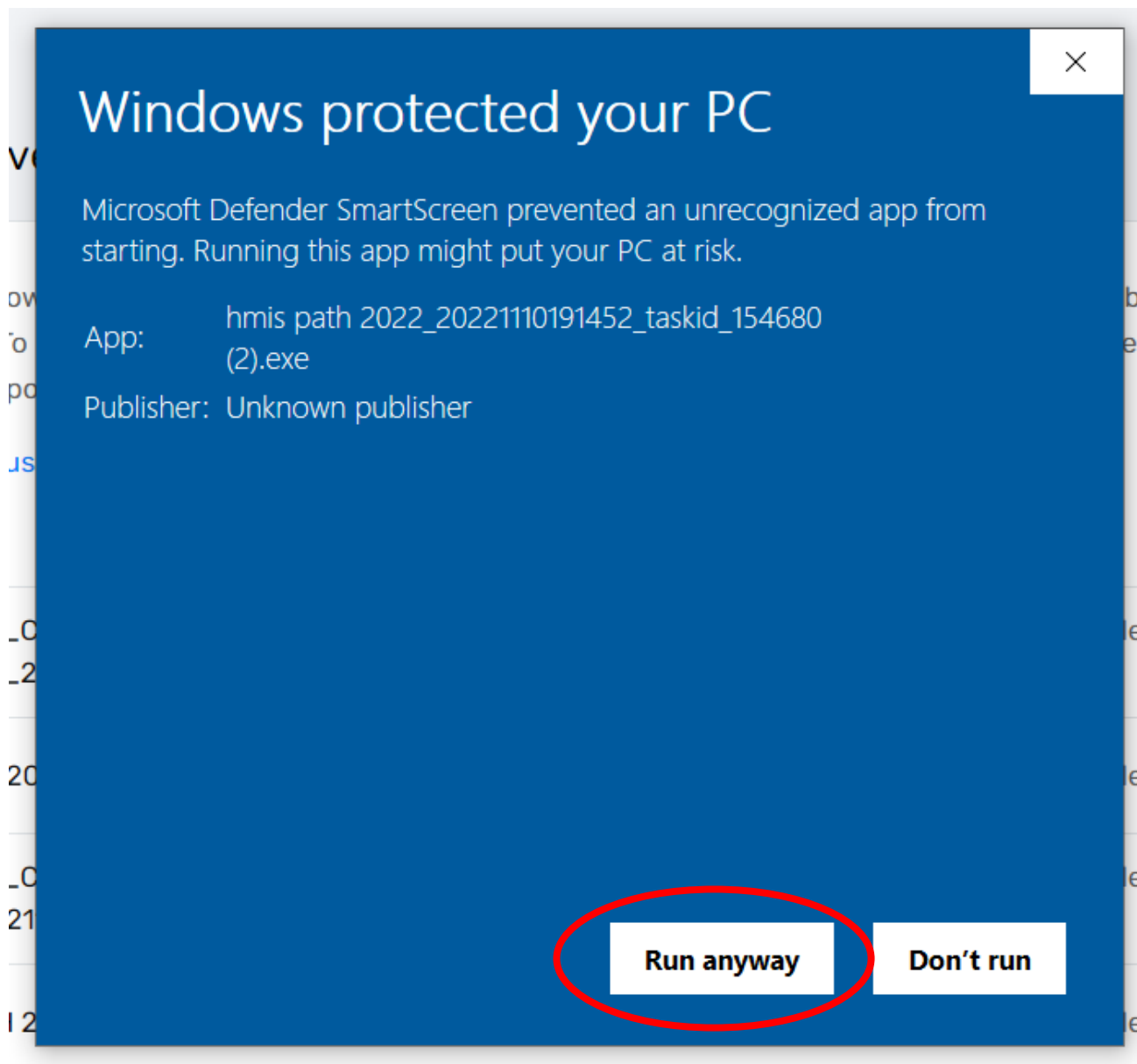
8. A pop-up window will appear, and the Export will show as a download in the bottom left corner of the screen as shown below. Click on the **“hmis path2022.exe”** to open the download.



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”**.



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.

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

14. For additional assistance please email the

HMISHelpDesk@ihcda.in.gov