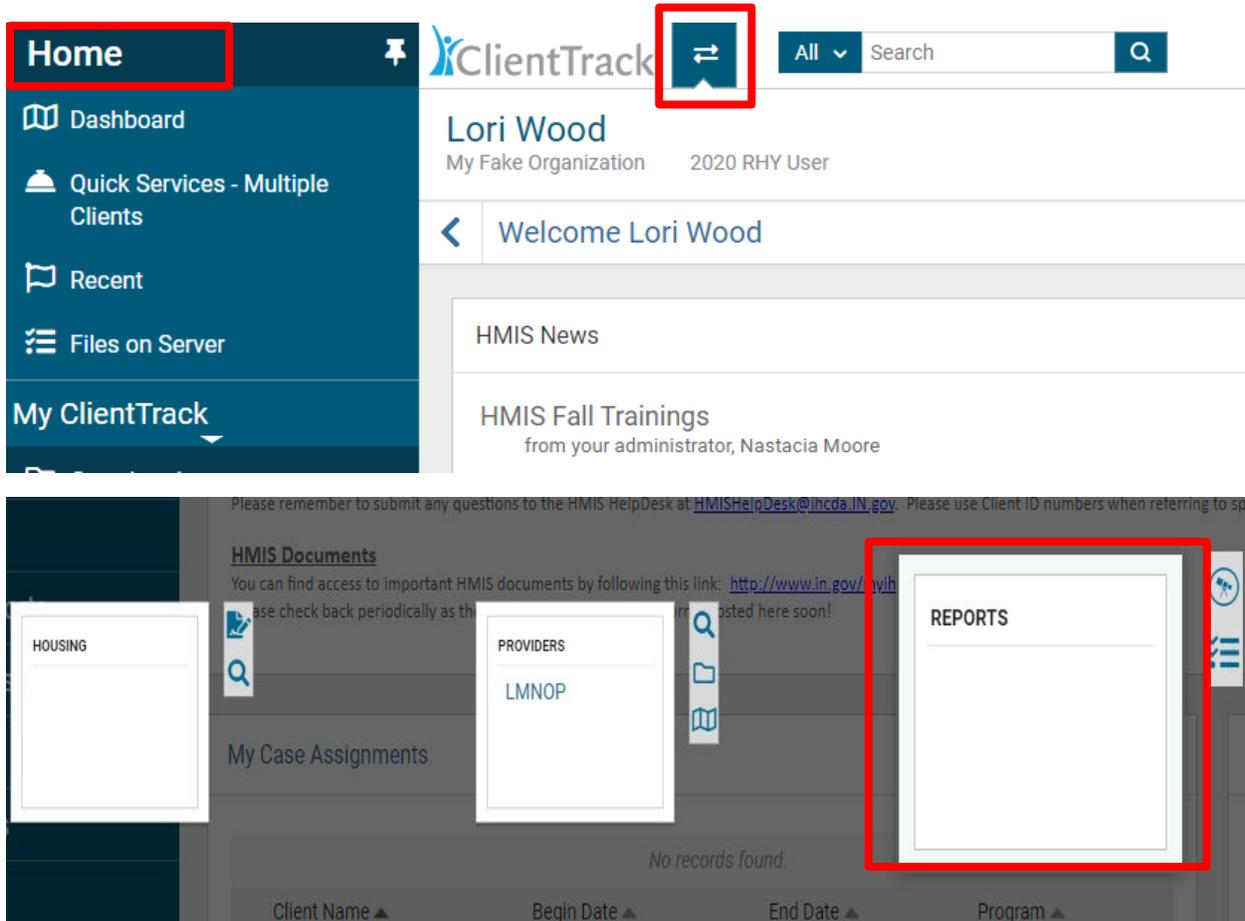


RHY Export Quick Reference Guide

1. From the **“Home”** workspace, click the double arrows to the right of the ClientTrack logo.
2. This will take you to the **“Workspace”** options. Click on **“Reports”**.



3. From the **“Reports”** workspace, click on **“HMIS Exports”**, then, click on **“RHY Export – CSV 2020”**.
4. Complete the report parameters:
 - a. **“Source End Point” = RHY Export**
 - b. **“Source Type” = Continuum-Operated HMIS**
 - c. **“Continuum of Care Code (CoC) = Indiana Balance of State of Indiana**
5. Complete the **“Date Range”** criteria
6. Select **“Filter by Program”** then select the **“Organization”**
7. Select **“Filter by Grant(s)”** then select the **“Grant Name”**
8. Click **“Run Export”** located in the bottom right of the screen

ClientTrack

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HMIS RHY Export - CSV 2020

Export RHY data in the HMIS CSV 2020 Standard the data included will fit the filters that are selected. The Source type is not used to filter the data it is only used as part of the export file.

Source End Point: **RHY Export**

Source Type: **Continuum-Operated HMIS**

State Filter: **Indiana**

Continuum of Care Code (CoC): **Indiana Balance of State**

Date Range

Predefined Date Range: **Since This Date, Last Year**

Enrollments active between: **12/06/2018** and **12/06/2019**

Export Date: **12/06/2019 12:32**

Organization(s)

Organization(s):
Noble House
North Central CAA
Northwest Indiana CAA
Oaklawn
Ohio Valley Opportunities, Inc
Open Door Community Services

Run Export **Cancel**

Ohio Valley Opportunities, Inc
Open Door Community Services

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.

Filter by Program(s)

Program(s):
My Fake Org RRH (ESG - R10)
My Fake Organization (ES - R10)
My Fake Organization PH (CoC-R10)
 My Fake Organization RHY BCP ES (R10)
My Fake Organization SSO (PATH-R10)
My Fake Organization SSVF Prev (VA-R10)

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.

Filter by Grant(s)

Grant(s):
 My Fake Org RHY (BCPes-R10)

Exclude Deleted Records:

Run Export **Cancel**

9. The **“Export Encryption”** box will appear. You must create and enter a password. The password you create must be at least 8 characters long.
10. When you are finished entering and confirming your password, click **“Done”** in the bottom right corner.

Export Encryption [X]

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.

Encrypt Export:

Password: *

Confirm Password: *

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

Done

✓ My Fake Org RHY (BCPes-R10) ✓

11. After clicking **“Done”**, a second pop-up box will appear with the following message:

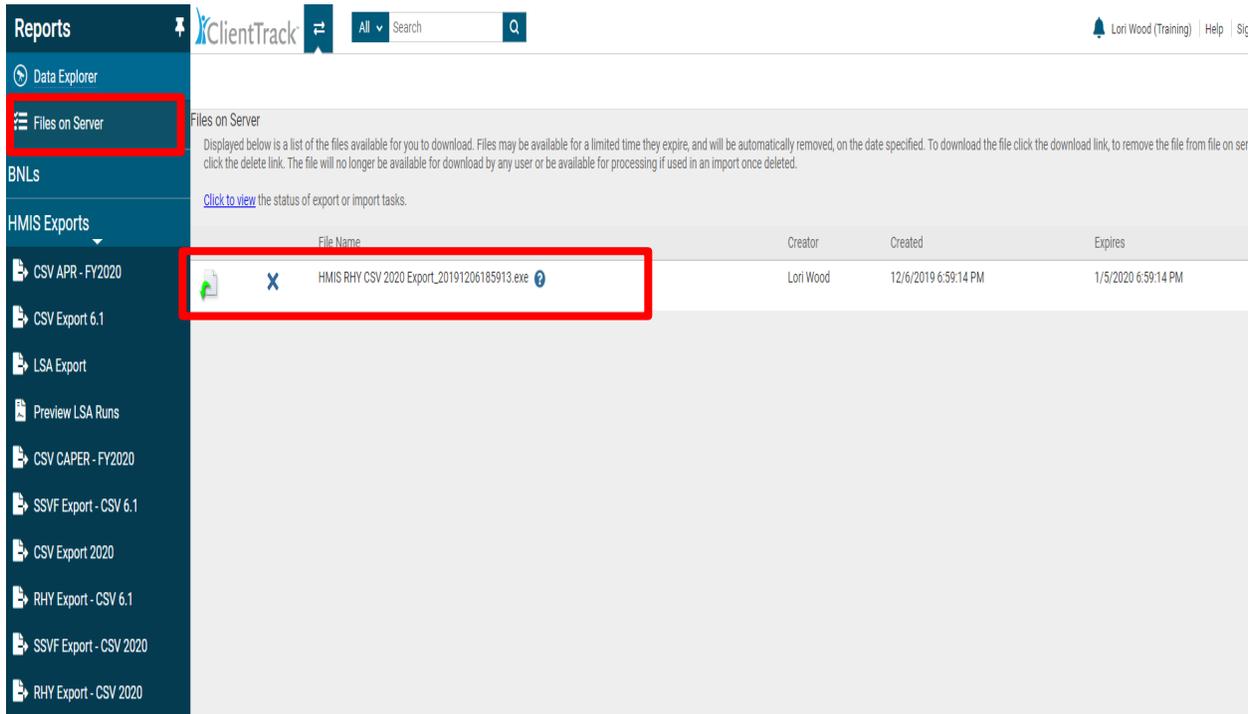
usw.clienttrack.net says

Your export has been queued and will be processed at the next available time.

OK

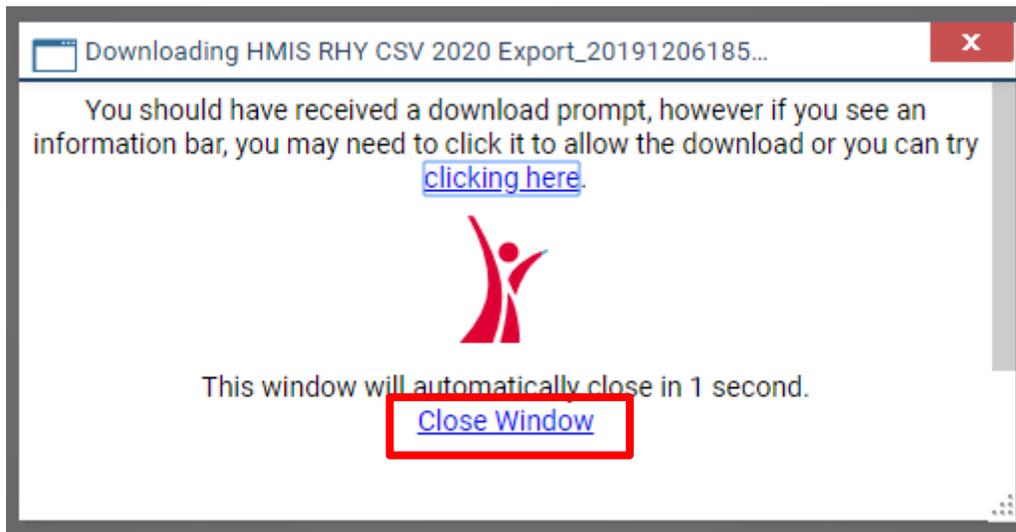
12. Click **“OK”**

13. The report has now been queued in the system. To check on the status of the report, click on **“Files on Server”** located in the left-hand side menu.



14. When the report is available, it will appear as seen in the diagram above. **(HMIS RHY CSV 2020 Export)**

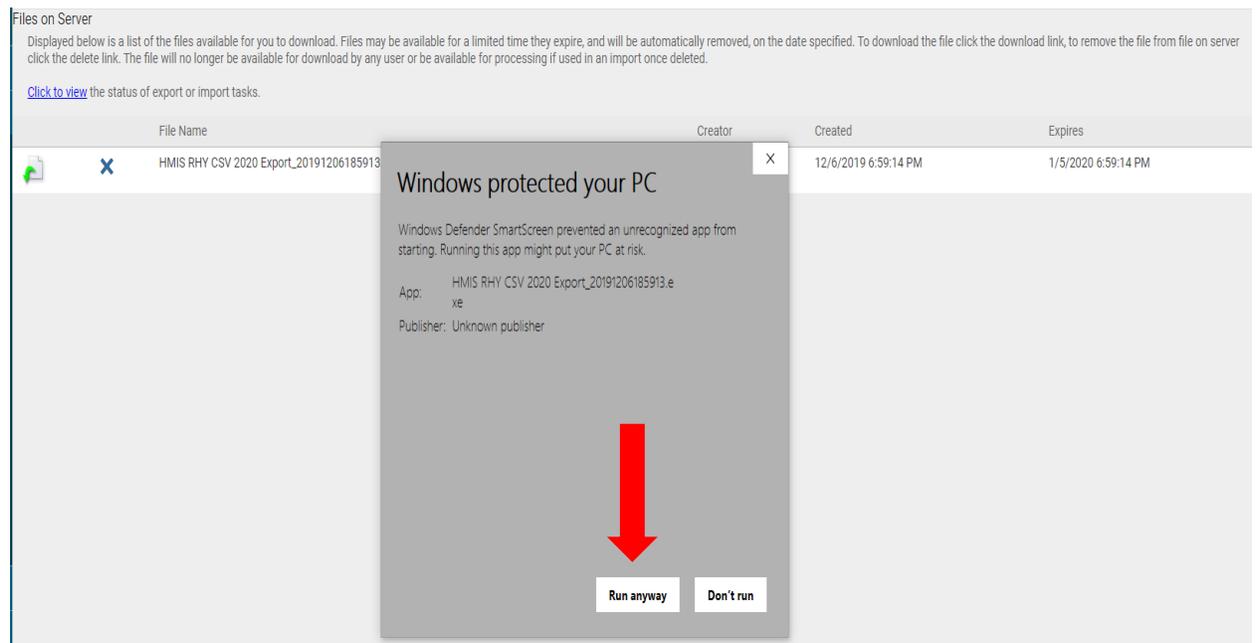
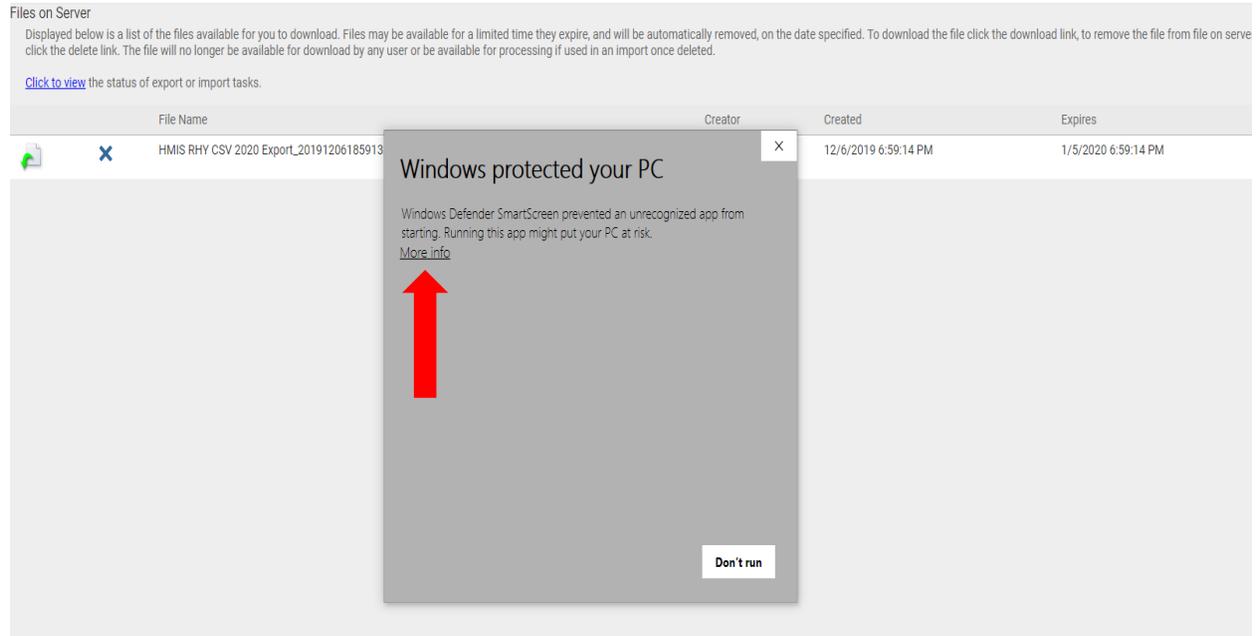
15. Click on the downward pointing green arrow.



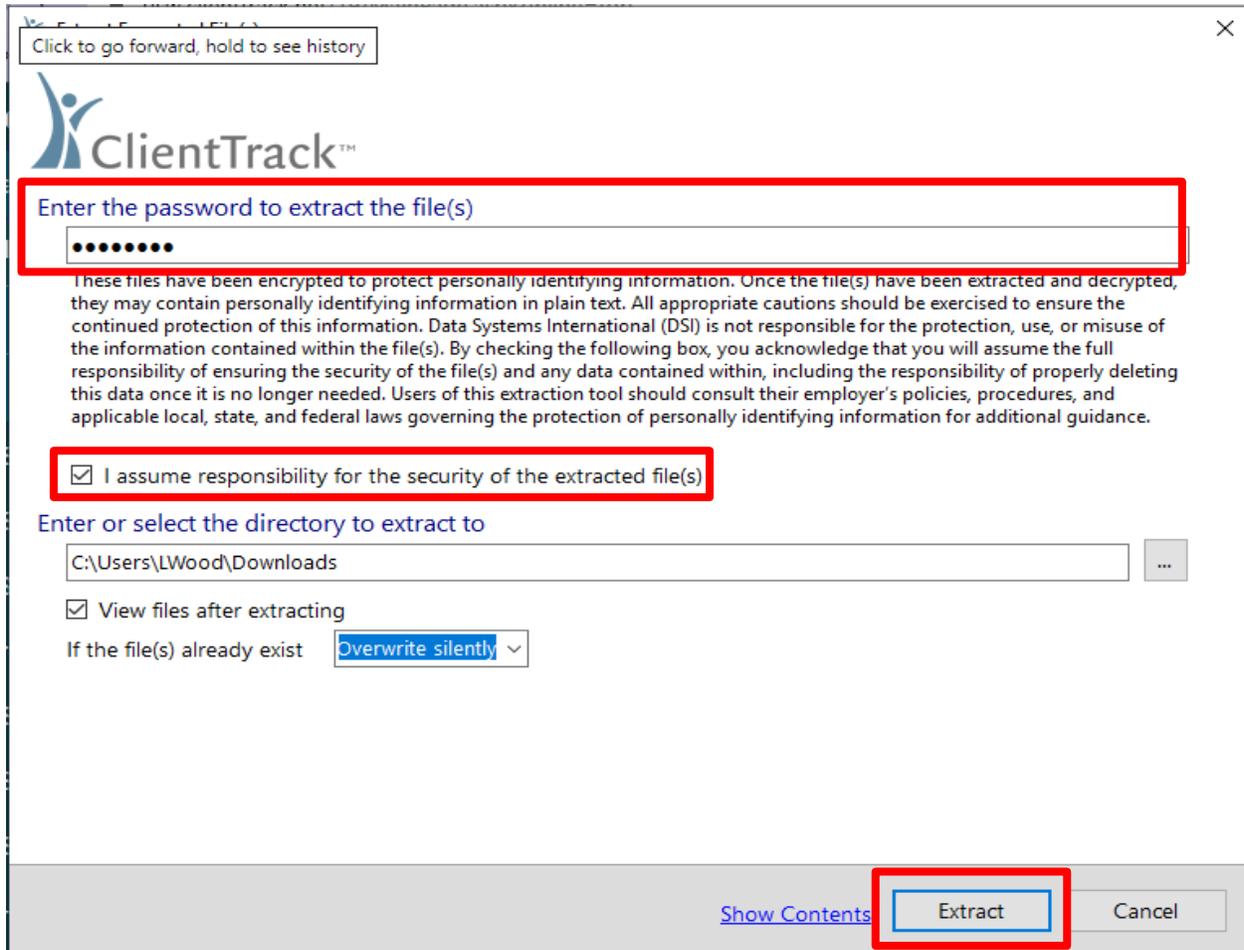
16. A pop-up window will appear notifying you the report has downloaded. Click **“Close Window”** to close the pop-up window.

17. A warning may appear. Click on “More Info”.

18. When the second warning appears click on “Run Anyway”



19. The “Extract Encrypted File(s)” pop-up box will appear. Enter the password you created for the report, click the check box “I assume responsibility for the security of the extracted file(s)” then click “Extract”.



20. The files will be saved to your computer

Name	Date modified	Type	Size
Client	12/6/2019 1:59 PM	Microsoft Excel Co...	12 KB
CurrentLivingSituation	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
Disabilities	12/6/2019 1:59 PM	Microsoft Excel Co...	24 KB
EmploymentEducation	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
Enrollment	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
EnrollmentCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	5 KB
Exit	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB
Export	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
Funder	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
HealthAndDV	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
HMIS RHY CSV 2020 Export_20191206185913	12/6/2019 2:20 PM	Application	1,838 KB
IncomeBenefits	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
Project	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
ProjectCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
Services	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
User	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB

December 2019

21. Select all files then right click.
22. Click on the “Send to” option.
23. Click on “Compressed (zipped) Folder”

Name	Date modified	Type	Size
 Client	12/6/2019 1:59 PM	Microsoft Excel Co...	12 KB
 CurrentLivingSituation	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 Disabilities	12/6/2019 1:59 PM	Microsoft Excel Co...	24 KB
 EmploymentEducation	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
 Enrollment	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
 EnrollmentCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	5 KB
 Exit	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB
 Export	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 Funder	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 HealthAndDV	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
 HMIS RHY CSV 2020 Export_20191206185913	12/6/2019 2:20 PM	Application	1,838 KB
 IncomeBenefits	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
 Project	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 ProjectCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 Services	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 User	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB

24. Name the zipped folder for upload to RHY Point (example: RHY Export 2019)

Name	Date modified	Type	Size
 Client	12/6/2019 1:59 PM	Microsoft Excel Co...	12 KB
 CurrentLivingSituation	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 Disabilities	12/6/2019 1:59 PM	Microsoft Excel Co...	24 KB
 EmploymentEducation	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
 Enrollment	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
 EnrollmentCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	5 KB
 Exit	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB
 Export	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 Funder	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 HealthAndDV	12/6/2019 1:59 PM	Microsoft Excel Co...	4 KB
 HMIS RHY CSV 2020 Export_20191206185913	12/6/2019 2:20 PM	Application	1,838 KB
 IncomeBenefits	12/6/2019 1:59 PM	Microsoft Excel Co...	9 KB
 Project	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 ProjectCoC	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 RHY Export 2019 	12/6/2019 2:33 PM	Compressed (zippe...	686 KB
 Services	12/6/2019 1:59 PM	Microsoft Excel Co...	1 KB
 User	12/6/2019 1:59 PM	Microsoft Excel Co...	2 KB

December 2019

25. Delete the remaining files showing. **DO NOT DELETE THE ZIPPED FOLDER**

Name	Date modified	Type	Size
 RHY Export 2019	12/6/2019 2:33 PM	Compressed (zippe...	686 KB

The export is now complete. Please contact the HMIS help desk with any questions.
HMISHelpDesk@ihcda.in.gov