HMIS CSV – APR 2017 Export for Sage

The CSV – APR 2017 export designed to meet HUD reporting requirements with the SAGE Repository. It is an export consisting of 65 separate CSV files. Similar to other exports, they will be downloaded as a self-extracting encrypted file. Once the data is extracted and decrypted, you will need to zip up the files to submit to Sage.

Navigation

Begin on the Home dashboard and locate the HUD / HMIS Reports folder **(Step 1)** and Export **(Step 2)** folder. Select the 'CSV – APR 2017' **(Step 3)** to start the HMIS CSV – APR 2017 export process for Sage.

Generating the CSV – APR 2017 Export

There are several filter options available for the HUD Data Quality Report. The main required filters are the Report Date Range, Organization, and Programs.

- ➢ **Report Date Range** – Indicate the time period for the report. The date range set will limit the reporting universe to those with Active enrollments in the date range selected. **(Step 4)**
- ➢ **Organization** – Will default to your organization. **(Step 5)**
- ➢ **Grant** – No selection is required. Please remember that clients are enrolled in programs and not directly in grants. Filtering just by the grant will pull clients enrolled in the programs funded by the specific grant. **(Step 6)**
- ➢ **Program** – Check the Filter by Program(s) box to limit report results by selected programs. Indicate which programs should be included in the report by selecting each program separately. **(Step 7)**
- ➢ **Generate Validation File** – Check this box to download client-level information related to the APR. **(Step 8)**

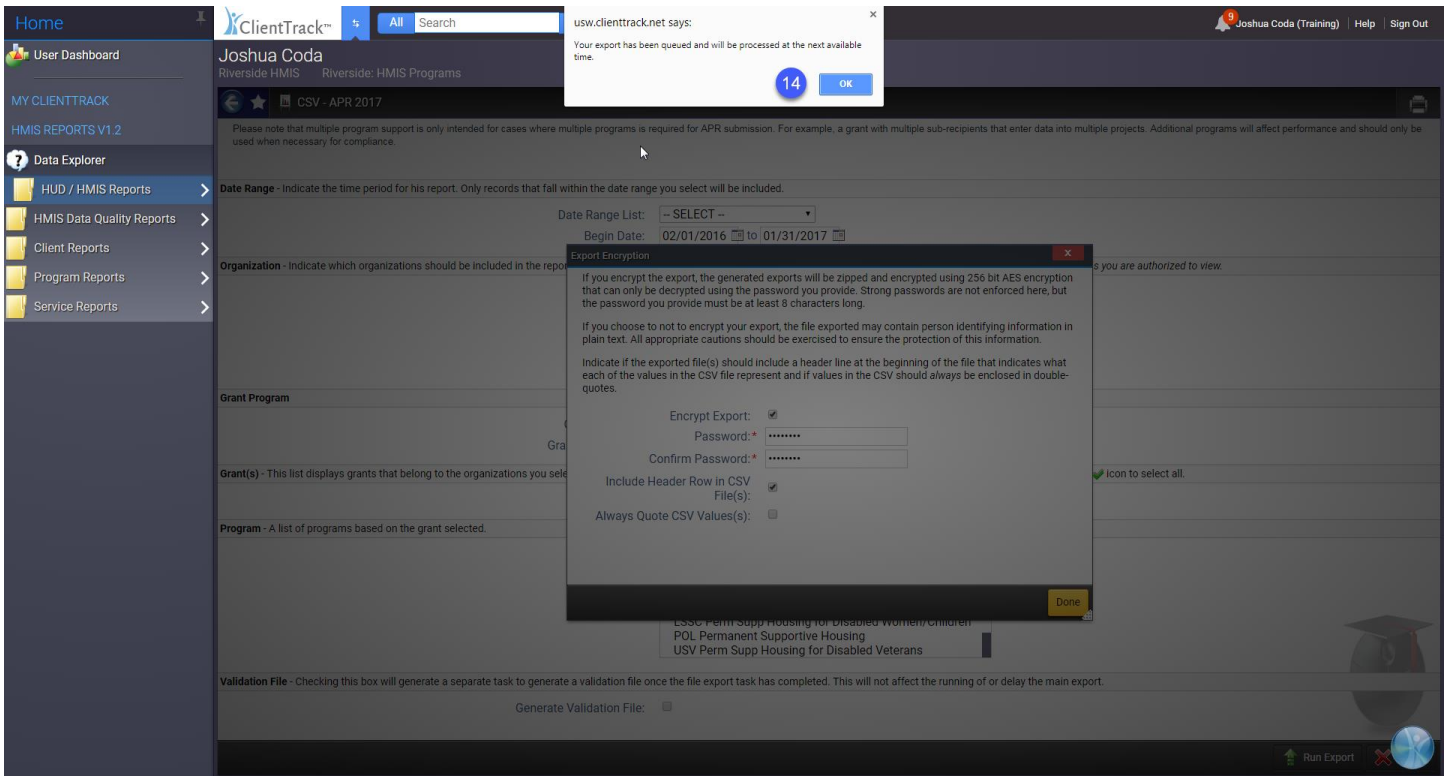➢ Select "**Run Export**" to generate the report. **(Step 9)**

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. **(Step 11 and Step 12)**

➢ If you choose not to encrypt your export, the file exported may contain personal identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this data.

➢ Select "Include Header Row in CSV File" to include a header line at the beginning of the file that indicates what each of the values in the CSV file represents.

➢ Select "Done". **(Step 13)**

Asynchronous Tasks

The export that will be completed through asynchronous tasks and the encrypted set of files will display on your **Files on Server (see the next section below for navigation instructions)** page once it has completed.

- ➢ The export will be queued in the Asynchronous Tasks and will be processed at the next available time.
- ➢ Select "OK". **(Step 14)**

➢ To view the status of your export, select the hyper-link "Click to view" **(Step 15)** to open the report task list **(Step 16).**
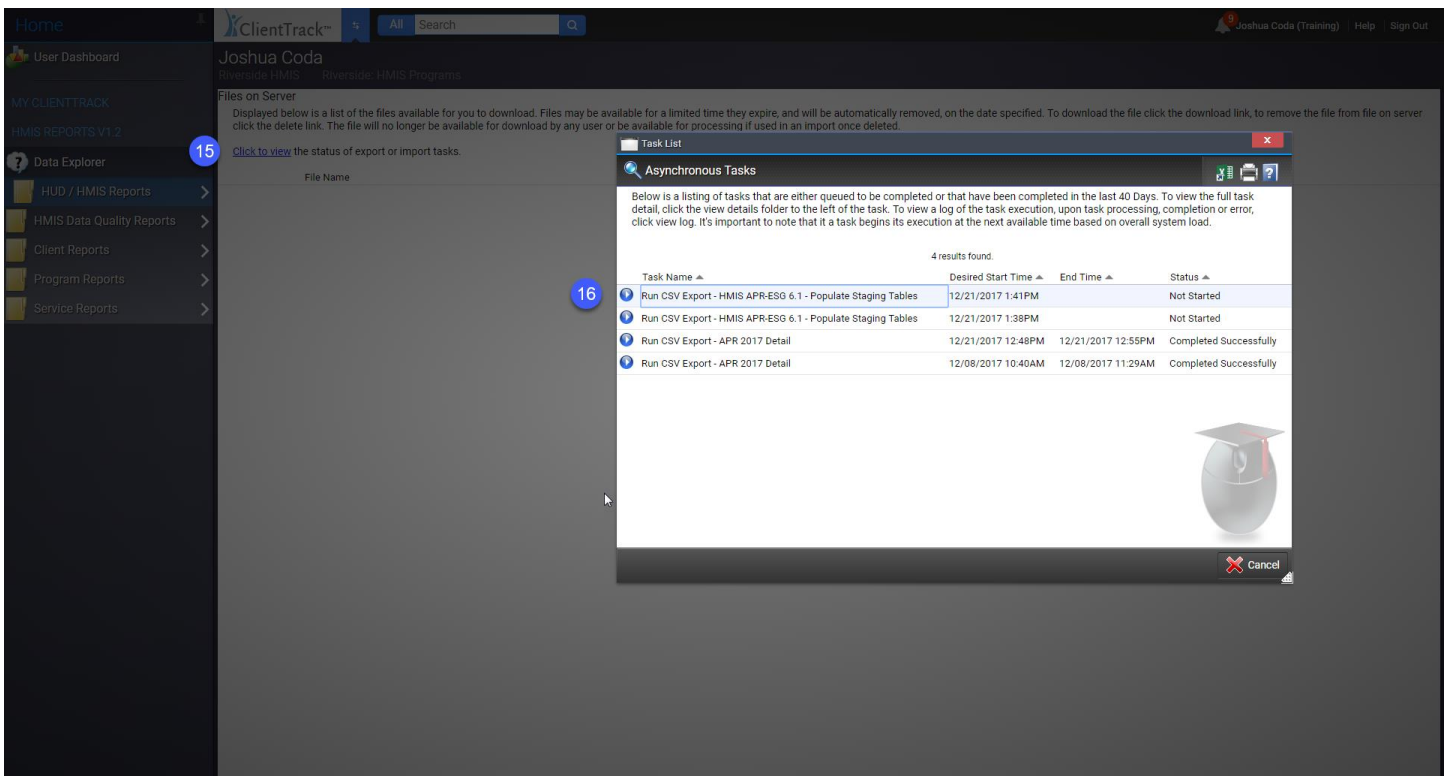
➢ Once the export has been generated, the file will display on your **Files on Server** page.

Files on Server Page

NOTE: The file exports may take <u>several minutes to several hours</u> depending on the size of the file and server capacity.

HMIS CSV – APR 2017 Export will generate two files: **HMIS CSV – APR-ESG 6.1 - Populate Staging Tables.exe** and **APR-ESG 6.1 Export.exe.** If the "Generate Validation File" is checked, a third file will generate with the file name **APR 2017 Detail.exe**. The APR 2017 Detail.exe will contain client-level data for you to validate the information you are submitting.

Sage does not collect client-level data. Do not submit full HMIS CSV files or any other type of file with Personally Identifying Information to Sage. ONLY files that the HMIS has indicated are in the CSV – APR Report format may be uploaded.

APR 2017 Export.exe contains the **65 CSV files** you will need for the Sage.

- ➢ Select "Files on Server" under the My Client Track Home Menu bar. **(Step 17)**
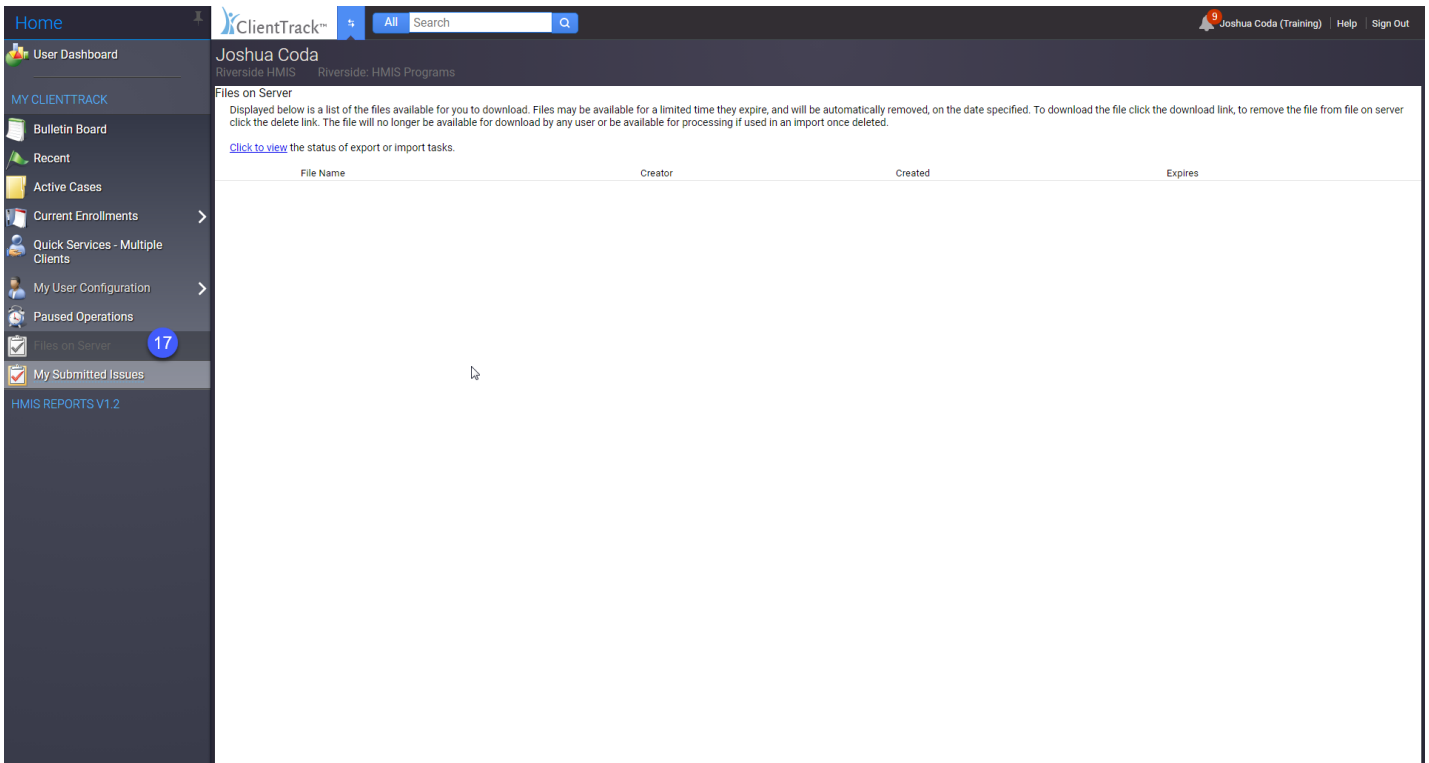
- ➢ Select the **APR 2017 Export.exe** with the green arrow and "Download the file" to receive the export. **(Step 18)**
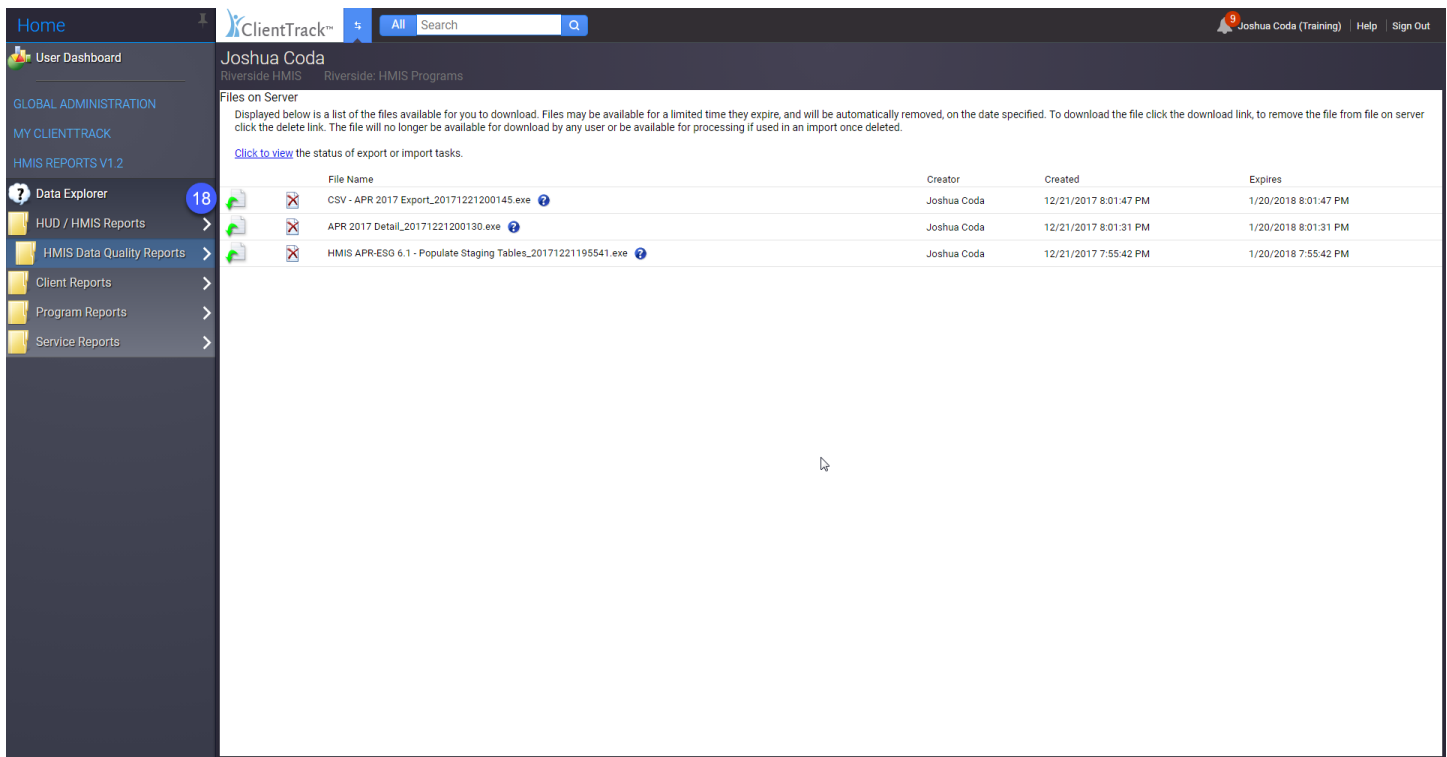
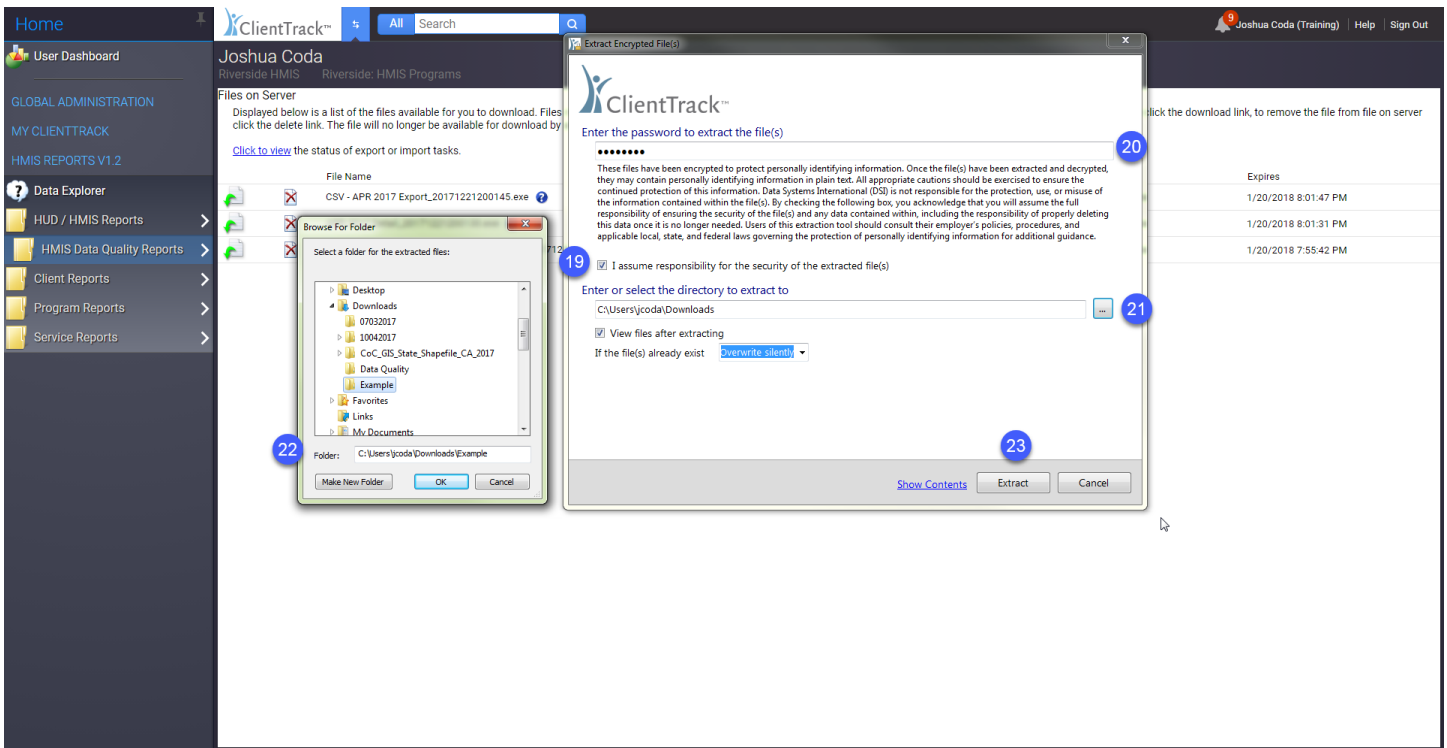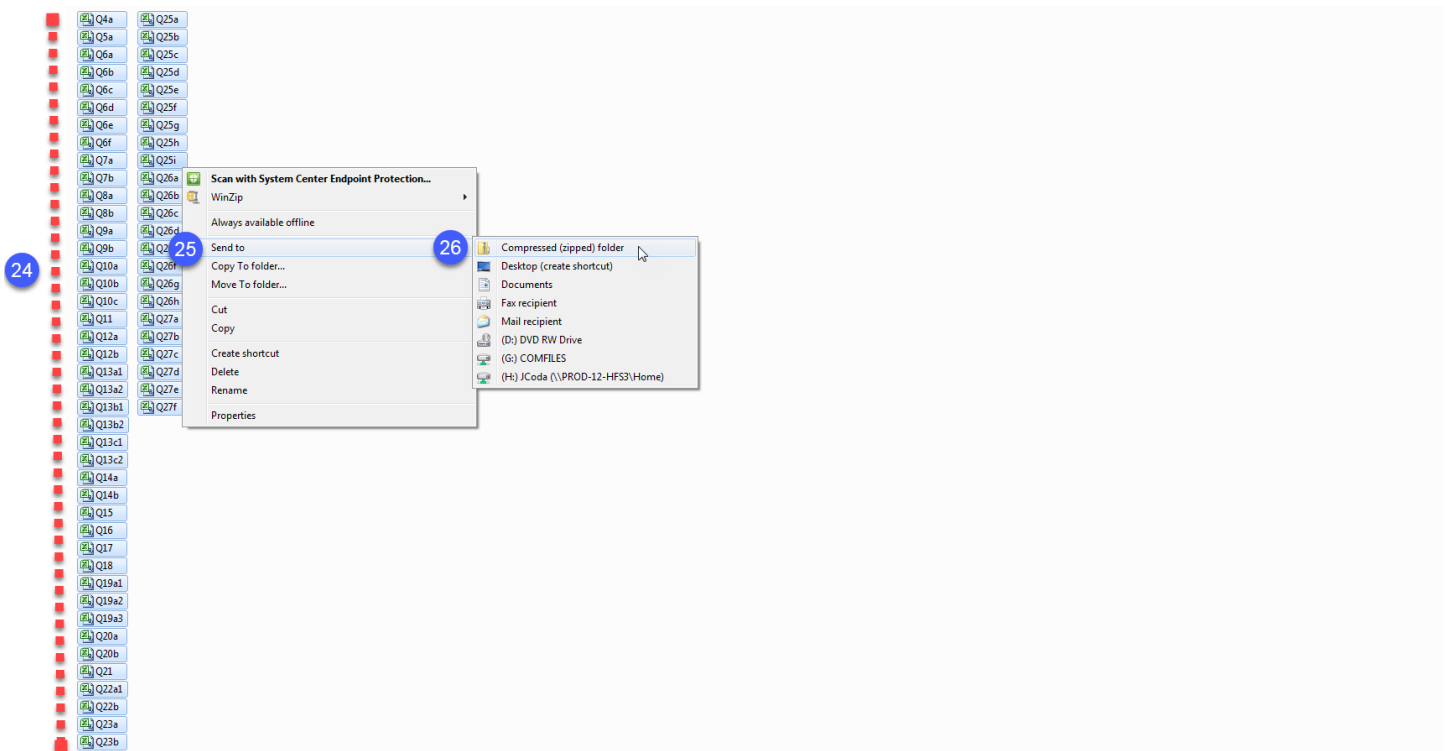➢ Select the downloaded executable file and open.

File Extraction

➢ At the Extract Encrypted File(s) prompt, select "I assume responsibility for the security of the extracted file(s)". **(Step 19)**
➢ Enter the password to extract the files. **(Step 20)**
➢ Enter or select the directory to extract to. Remember where you place it – so you can find it. **(Step 21 and Step 22)**
➢ Select "Extract". **(Step 23)**

- **65 CSV files** will extract into your folder.
- Select all 65 CSV files (Ctrl+A) in the folder. **(Step 24)**
- Right click any file and in the selection box select "Sent to". **(Step 25)**
- Select "Compressed (zipped) folder" and then name your file. **TIP: Users should name the file APR-Grant Number. (Step 26)**
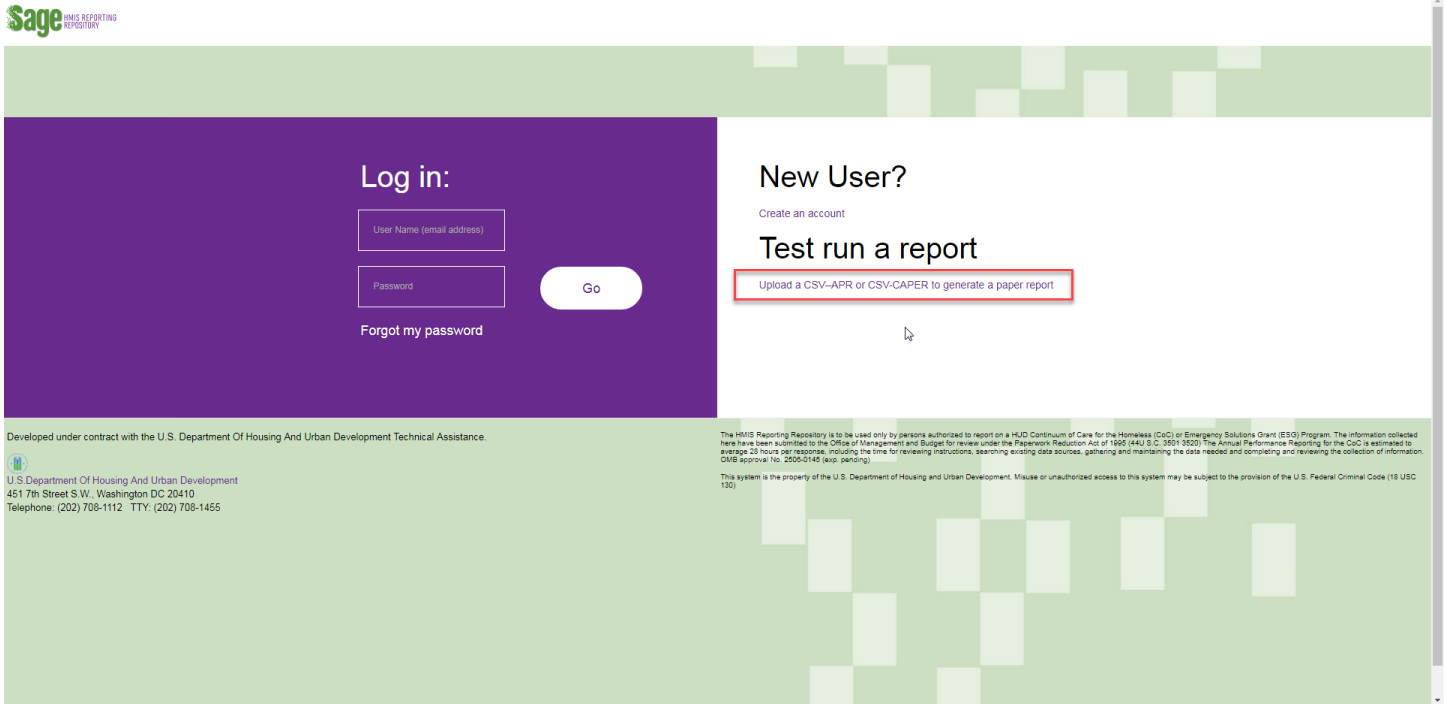
➢ Your final file should looks like the following:

| ⬛ APR-CA0666L9d081603 | 12/21/2017 12:33 ... | WinZip File | 23 KB |

Test Run a Report to Sage

➢ Go to https://www.sagehmis.info/

➢ At the Log In screen Select Upload a CSV-APR or CSV-CAPER to generate a paper report.

➢ Check the browse button. Your computer's file directory will appear. Find the CSV-APR Report you saved and double click on it.

➢ Check the box next to "I am not a Robot" and complete the verification steps if necessary.

➢ Click on "Upload and Test" button to upload the file from your computer to Sage.

➢ A results message will show.

➢ If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.

➢ If there are errors, you will need fix the problem(s) in your HMIS and download a new CSV-APR. **NOTE: Refer to the 2017 APR Detail.exe file mentioned above to view the client-level data and attempt to address the errors. If you are unable to fix the problem(s), please contact HMIS Support.**

➢ You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.

➢ If you want to test another CSV, repeat the process outlined above.