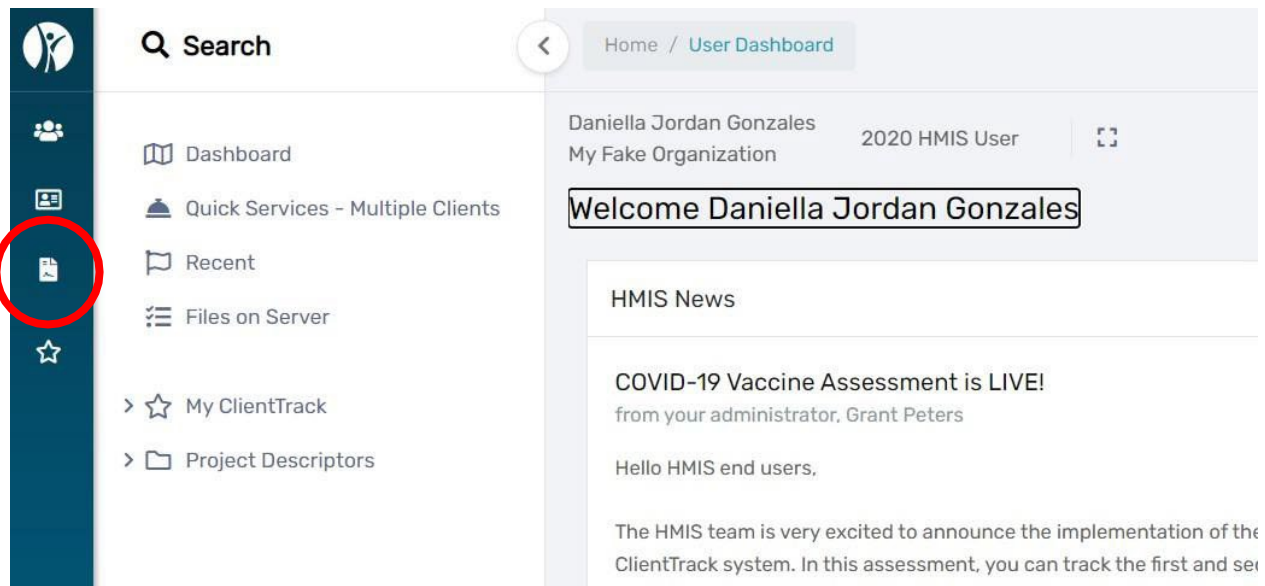


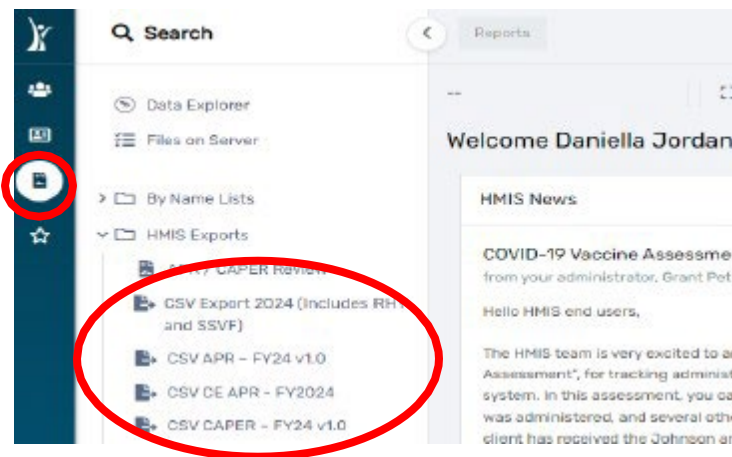
# How to Run/Export the Consolidated Annual Performance & Evaluation Report (CAPER) or Annual Performance Report (APR) in HMIS/DV ClientTrack

## Running the Export

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”**.



2. Once in the **“Reports”** screen, **click HMIS Exports** from the white left-hand side menu as shown below. Make sure the white left-side menu is expanded by clicking on the back arrow at the top. A drop-down menu will appear. Select **“CSV APR – FY24 v1.0”** or **“CSV CAPER – FY24 v1.0”** as shown below.



## Setting Export Parameters

1. Set up the export parameters by entering the date range with a predefined option in the drop-down list or enter the date range in the **“Begin Date”** and **“To”** field. Your organization will auto populate.

### CSV CAPER - HMIS 2024 Standard - FY2024 v1.0

#### 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 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 his report. Only records that fall within the date range you select will be included.

Date Range List: Since This Date, Last Year  
Begin Date: 12/08/2022 to 12/08/2023

#### Organization

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 s created by the Organizations selected here will be included in the export.*

Organization: \*  
A Better Way  
A Mother's Hope  
Advantage Housing Inc  
AIDS Ministries Elkhart  
AIDS Resource Group Evansville

2. Leave the **“Filter by Grant(s)”** field blank as this does not work properly and will cause issues when running the report.
3. Select the **“Project Type”** and **“Project (Name)”** for the export. Also select **“Generate Validation File”** by clicking on the checkbox. A check mark should appear when this option is selected successfully.

#### Project

The list displays projects that belong to the organizations you selected above. Indicate which projects should be included in the report by selecting each project type and/or project separately or click the  icon to select all. Unchecking the HMIS Projects Only checkbox will allow the APR to be run on any project in the system. If running an APR for a non-HMIS project, please be aware that there may be missing information where information wasn't collected.

Project Type:  Filter by Project Type  
Emergency Shelter - Entry Exit  
Emergency Shelter - Night-by-Night  
Transitional Housing  
 PH - Permanent Supportive Housing (disability required for entry)  
Street Outreach

HMIS Projects Only:

Project(s): \*  Filter by Project(s)  
 My Fake Org PSH  
My Fake Organization HOPWA(PSH-RB)

4. Click on **“Run Export”** in the bottom right-hand corner to begin the data export for your program.

Validation File

Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will not affect the running of or delay the main export. **THIS MUST** be selected to get details of numbers in the APR and the report used to review the export

Generate Validation File:

**Run Export** Cancel

## Accessing Export Files & Report Preparation

5. An **“Export Encryption”** window will appear where you set the **“Password”** to protect the files. Enter a password and click **“Done”** to continue with the export.

**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: \*

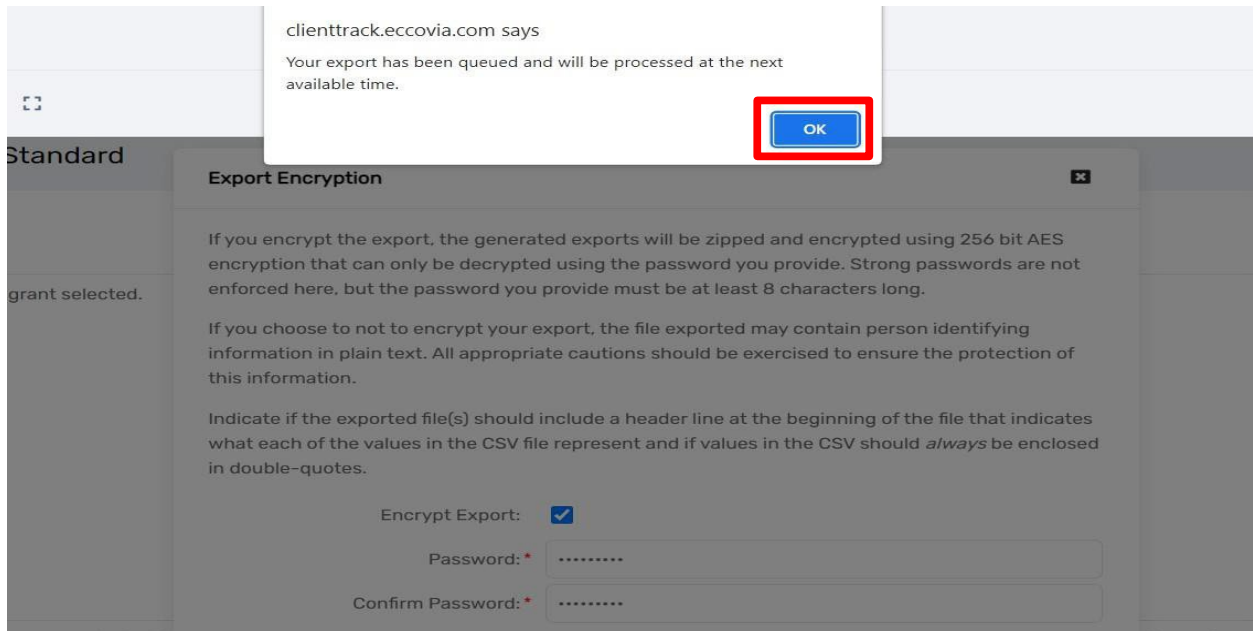
Confirm Password: \*

Include Header Row in CSV File(s):

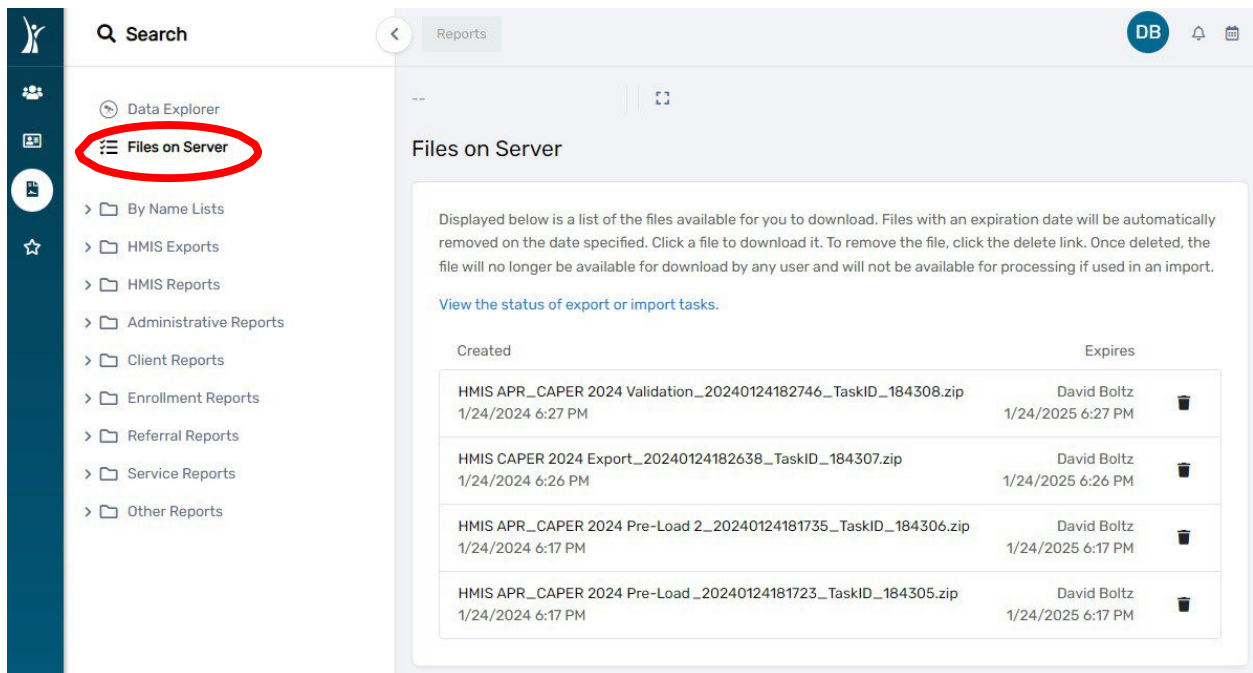
Always Quote CSV Values(s):

**Done**

6. A pop-up will appear **“Your export has been queued and will be processed at the next available time.”** Click **“OK”**



7. **NOTE:** It takes approximately 20 – 30 minutes for the report to load. To check the status of your report, click **“Files on Server”** as shown in the image below



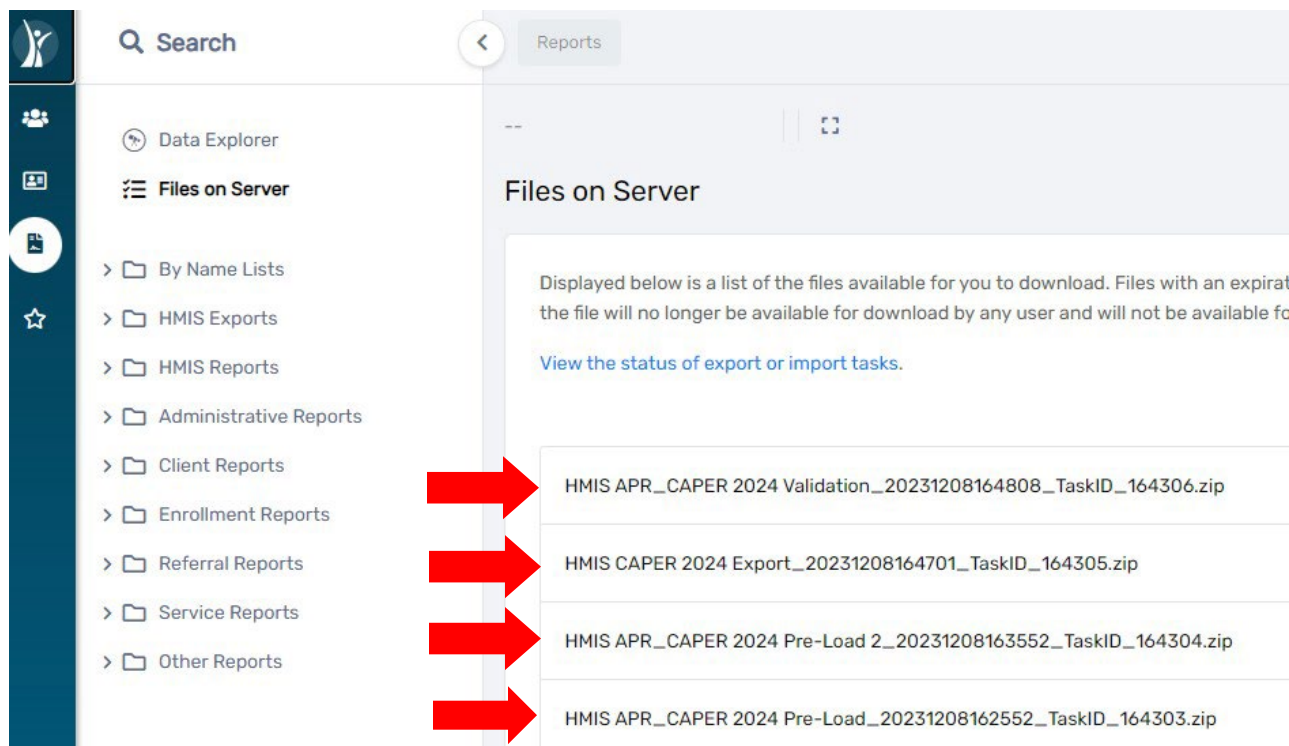
8. The report is ready once three separate files are displayed as indicated in the screenshot below. The following files will appear on the “Files on Server” screen once your report is ready.

**a. For CAPERs:**

- **HMIS APR CAPER 2024 Validation file**
- **HMIS CAPER 2024 Export file**
- **HMIS APR CAPER 2024 Pre-Load file**
- **HMIS APR CAPER 2024 Pre-Load 2 file**

**b. For APRs:**

- **HMIS APR CAPER 2024 Validation file**
- **HMIS APR 2024 Export file**
- **HMIS APR CAPER 2024 Pre-Load file**
- **HMIS APR CAPER 2024 Pre-Load 2 file**



9. Next, click anywhere on “HMIS APR 2024 Export” file if running an APR as shown in the image below.



Q Search

< Reports

Data Explorer

Files on Server

- > By Name Lists
- > HMIS Exports
- > HMIS Reports
- > Administrative Reports
- > Client Reports
- > Enrollment Reports
- > Referral Reports
- > Service Reports
- > Other Reports

### Files on Server

Displayed below is a list of the files available for you to download. Files with an expiration date will no longer be available for download by any user and will not be available

[View the status of export or import tasks.](#)

HMIS APR\_CAPER 2024 Validation\_20231208164808\_TaskID\_164306.zip

HMIS CAPER 2024 Export\_20231208164701\_TaskID\_164305.zip

HMIS APR\_CAPER 2024 Pre-Load 2\_20231208163552\_TaskID\_164304.zip

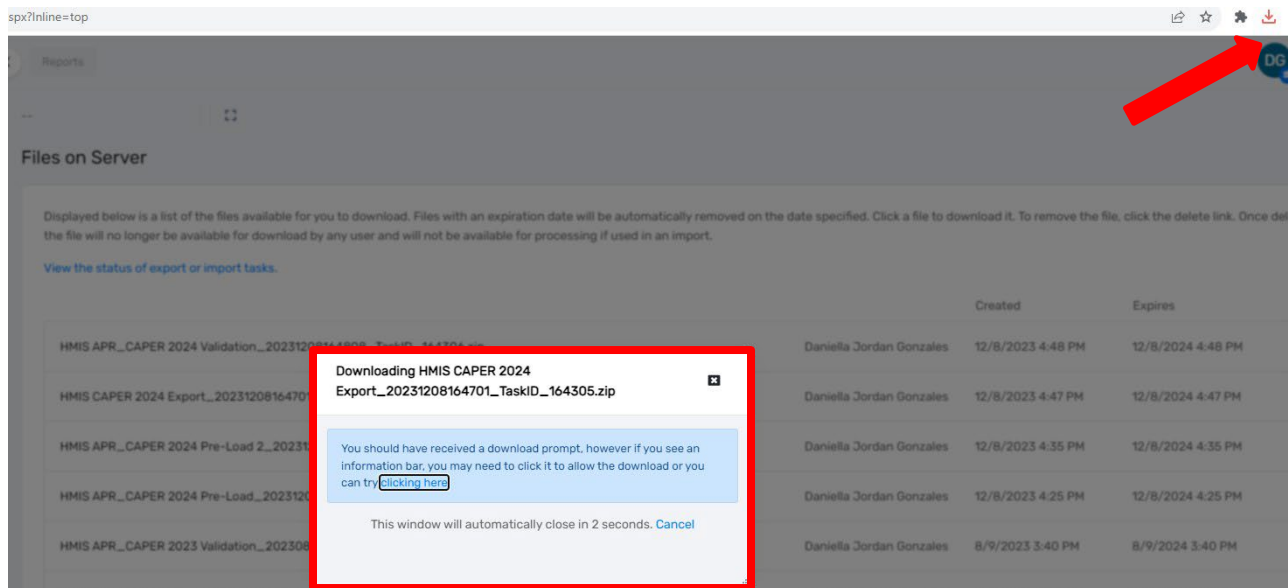
HMIS APR\_CAPER 2024 Pre-Load\_20231208162552\_TaskID\_164303.zip

**CAPER: You will download, compress, and upload the “HMIS CAPER 2024 Export” file to SAGE.**

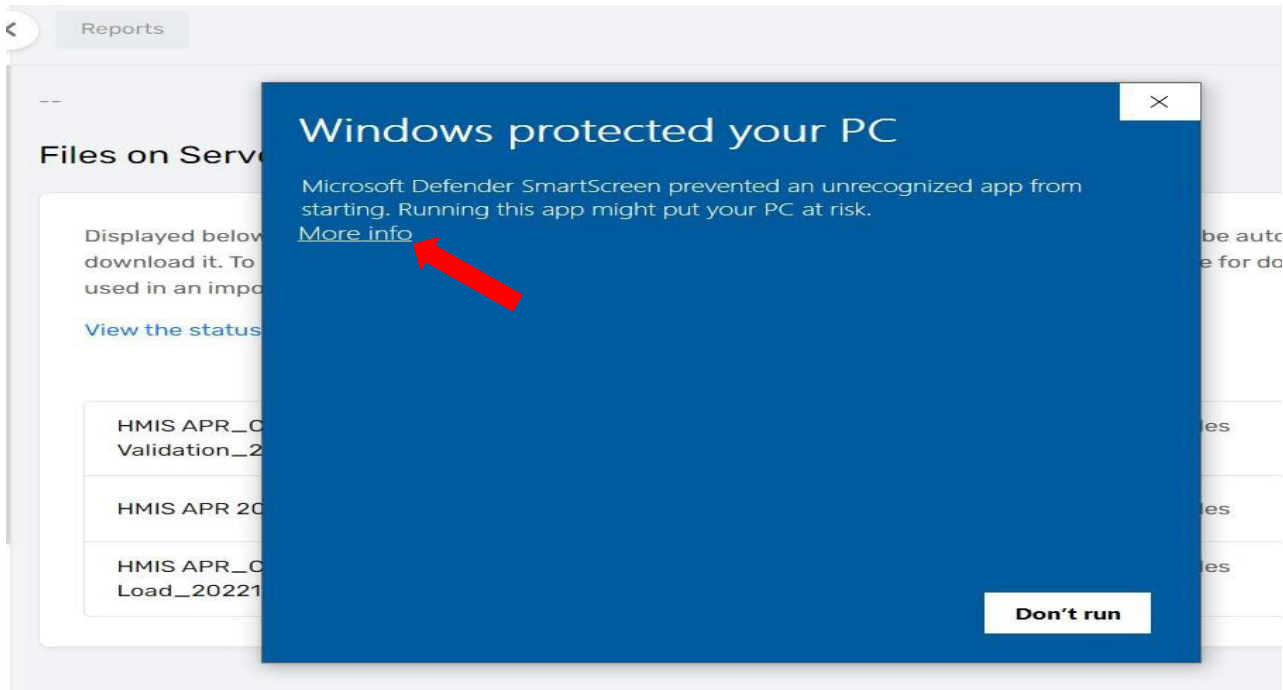
**APR: You will download, compress, and upload the “HMIS APR 2024 Export” file to SAGE.**

**IMPORTANT NOTE: SAGE WILL NOT ACCEPT THE “VALIDATION OR PRE-LOAD” FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE “EXPORT FILE” IN SAGE.**

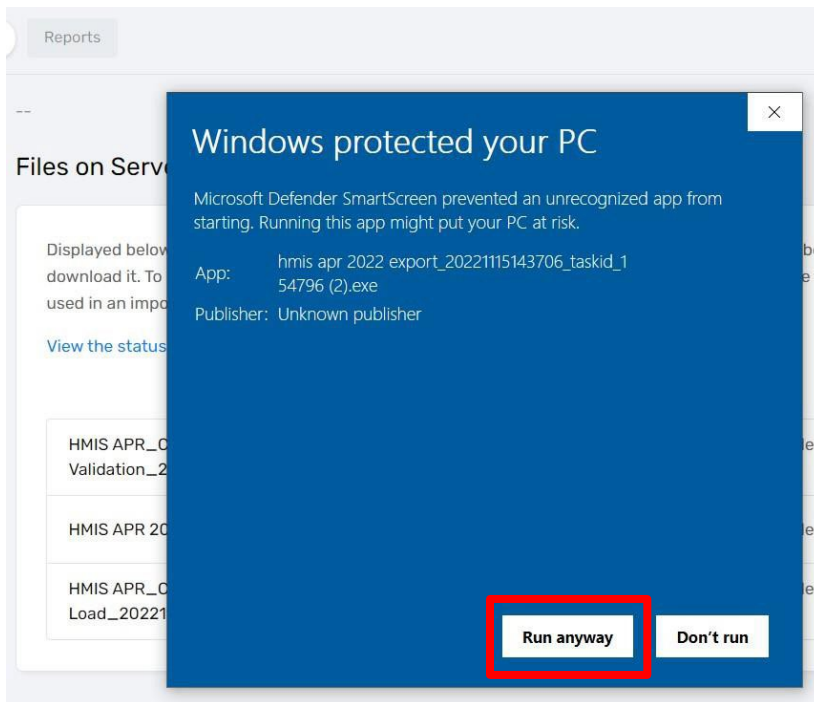
10. After clicking on “HMIS APR 2024 Export” file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select “Open or Open when done” as shown below.



11. You may receive the message below. Please click on **“More info”**

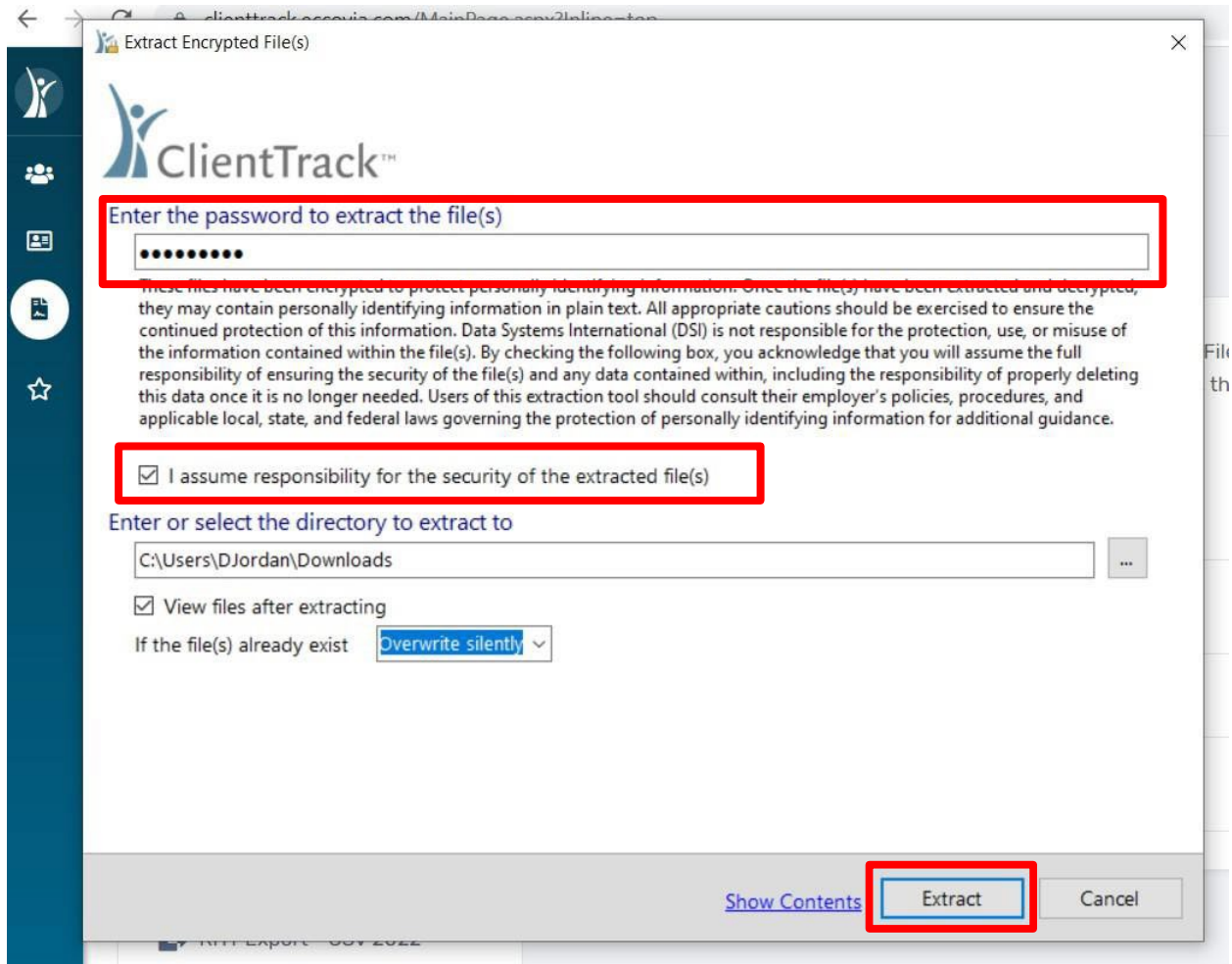


12. Next, click the **“Run anyway”** option as seen below.

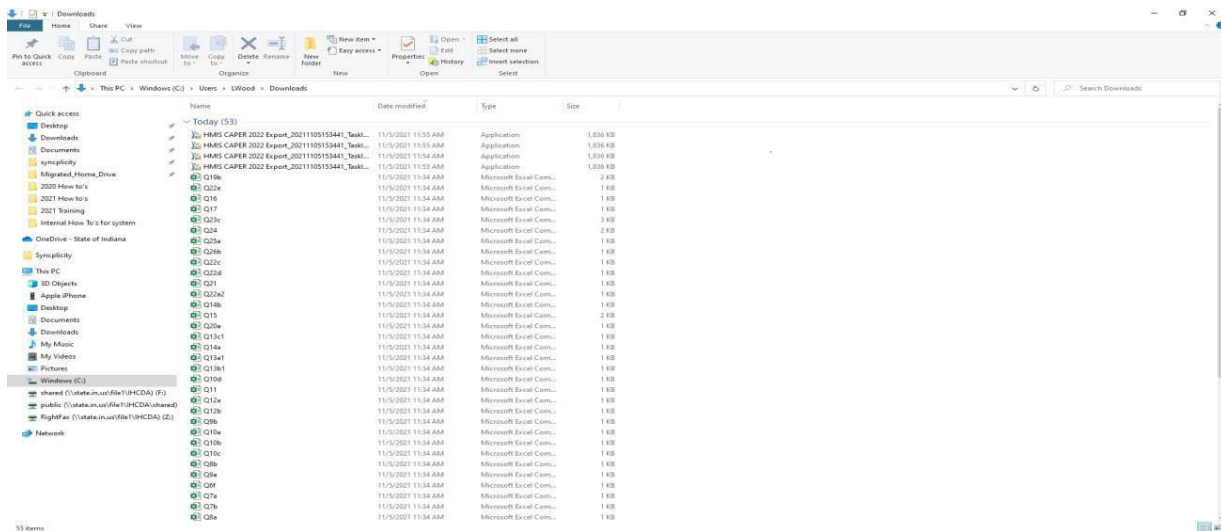




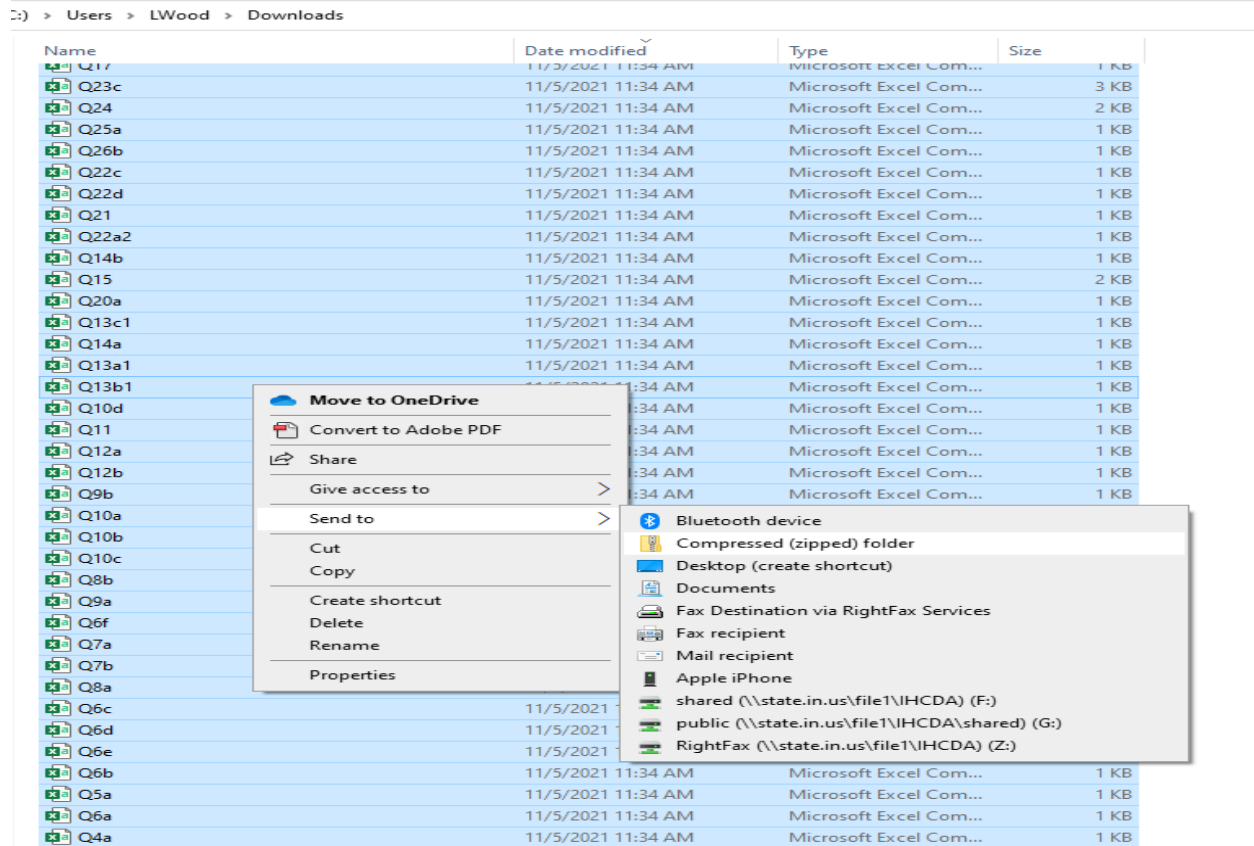
13. Enter the password you created during **Step 4** of this guide, click the check box **“I assume responsibility for the security of the extracted file(s)”**, then select **“Extract”**



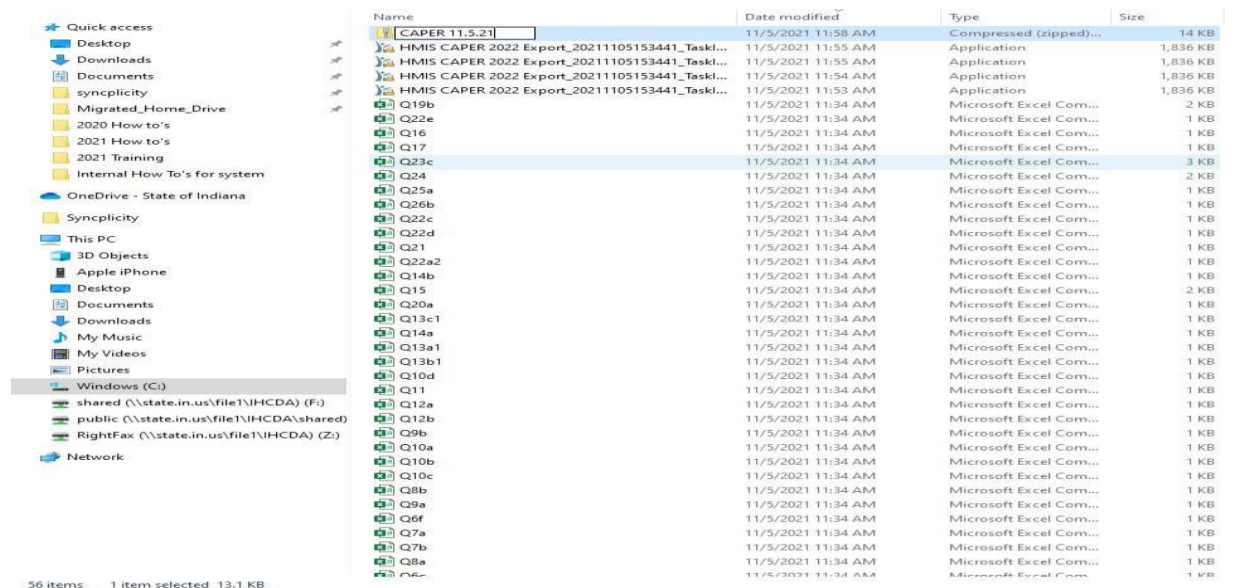
14. The files will download to your computer as seen below.



15. Click on the first “Q” file and hold down the shift key while using your “arrow down” key to highlight all the “Q” labeled report files. Next, right click and select the “Send to” “Compressed (zipped) folder.”



16. The “zipped” folder will appear on your screen. Enter the name of your report for the “zipped” folder.



17. Next, delete the individual “Q” files still showing in the “download” files on your computer. You only need to keep the “zipped” folder for upload to SAGE.

Name	Date modified	Type	Size
Q17	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q23c	11/5/2021 11:34 AM	Microsoft Excel Com...	3 KB
Q24	11/5/2021 11:34 AM	Microsoft Excel Com...	2 KB
Q25a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q26b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q22c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
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Please email your respective helpdesk at [hmishelpdesk@ihcda.in.gov](mailto:hmishelpdesk@ihcda.in.gov) or [dvhelpdesk@ihcda.in.gov](mailto:dvhelpdesk@ihcda.in.gov) for further assistance.