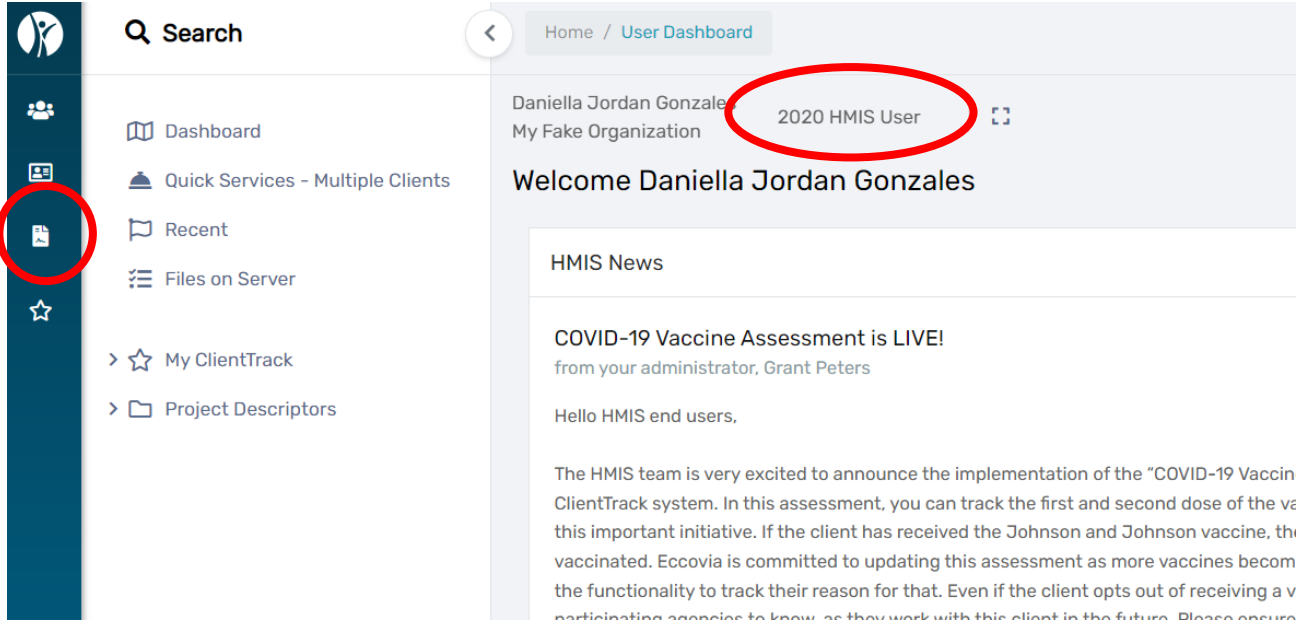
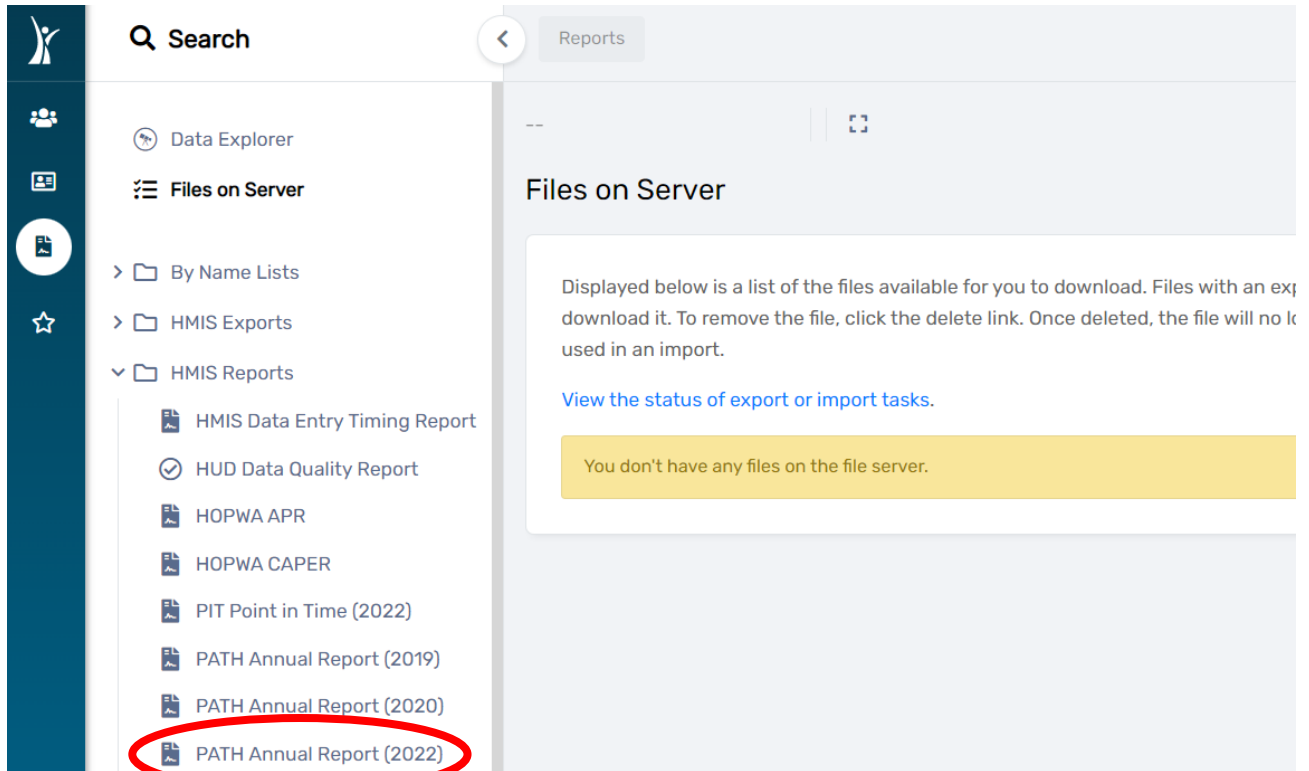


How to Run a PATH Annual Report

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 displays the '2022 PATH Annual Report' configuration interface. On the left is a sidebar with a search bar and a list of report categories: 'Data Explorer', 'Files on Server', 'By Name Lists', 'HMIS Exports', 'HMIS Reports', 'Administrative Reports', 'Client Reports', and 'Enrollment Reports'. The main content area is titled '2022 PATH Annual Report' and contains two highlighted sections:


- Date Range:** This section is titled 'Date Range' and contains the instruction: 'Indicate the time period for this report. Only records that fall within the date range you select will be included.' It features a 'Predefined Date Range:' dropdown menu currently set to 'Current Month' and a 'Service Date Between:' field with two date pickers set to '11/01/2022' and '11/30/2022'.
- Organization(s):** This section is titled 'Organization(s)' and contains the instruction: 'Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. All organizations you are authorized to view.' Below this is 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 at the end of 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


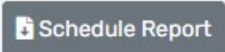


You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so).

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): 

- 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

- 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.

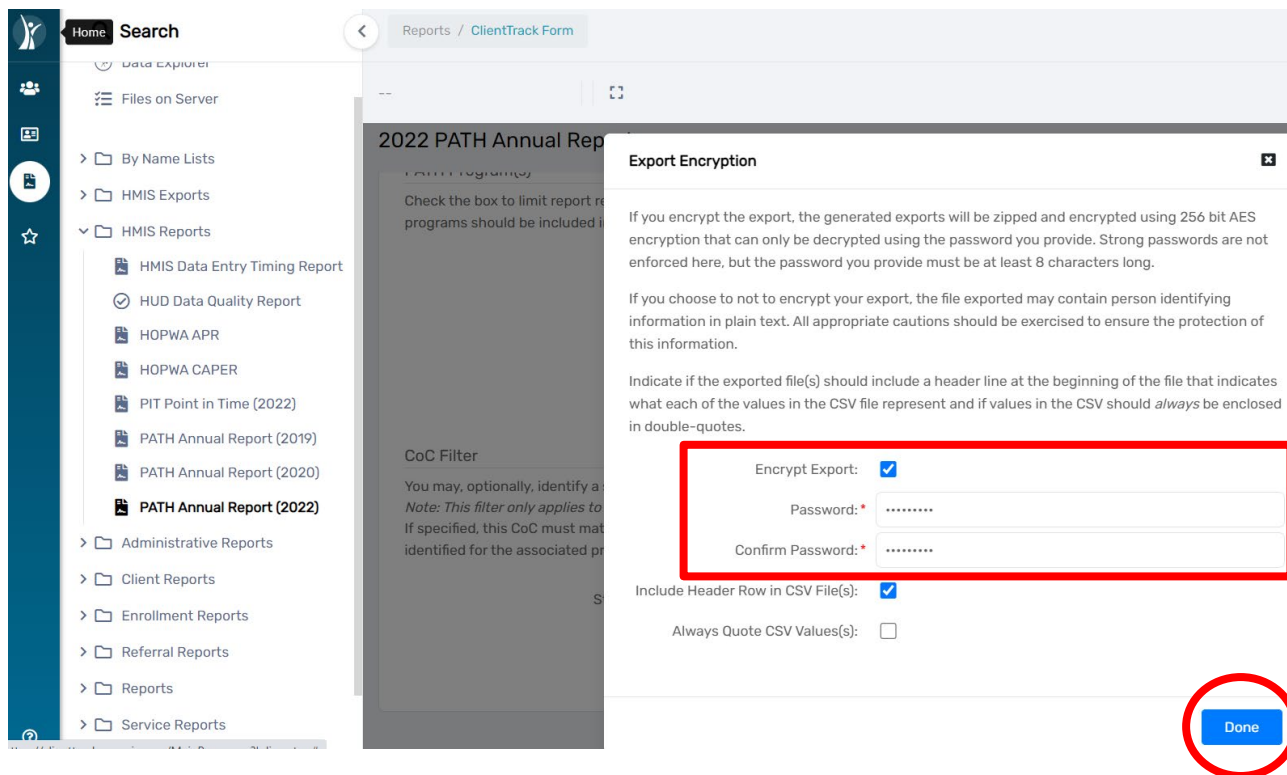
Program(s): Filter by Program(s)

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.

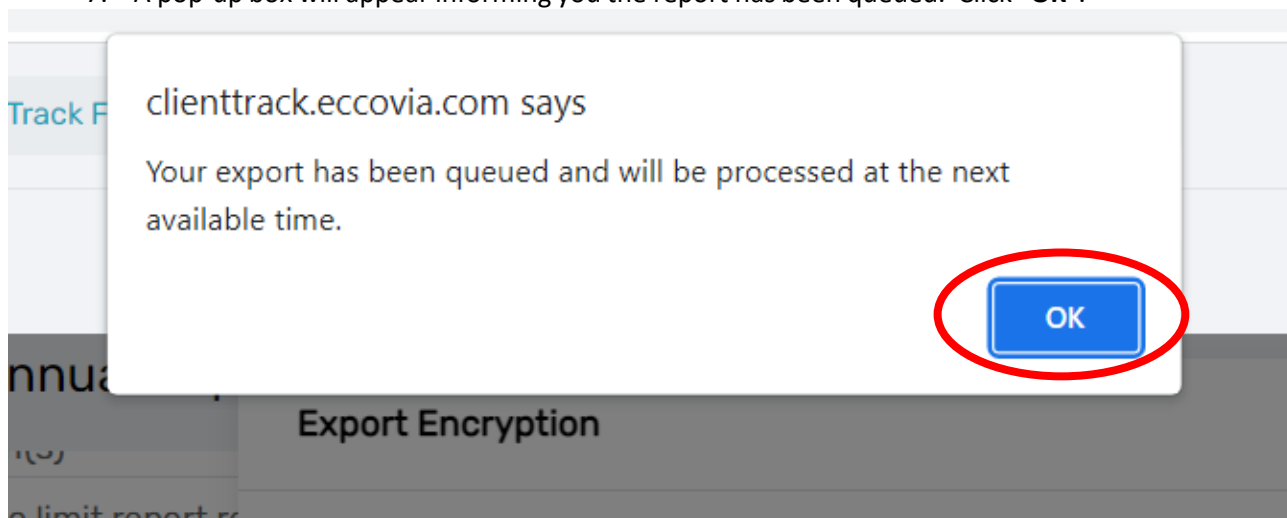
State / Territory Filter for CoC: -- SELECT --

CoC (optional): -- SELECT --

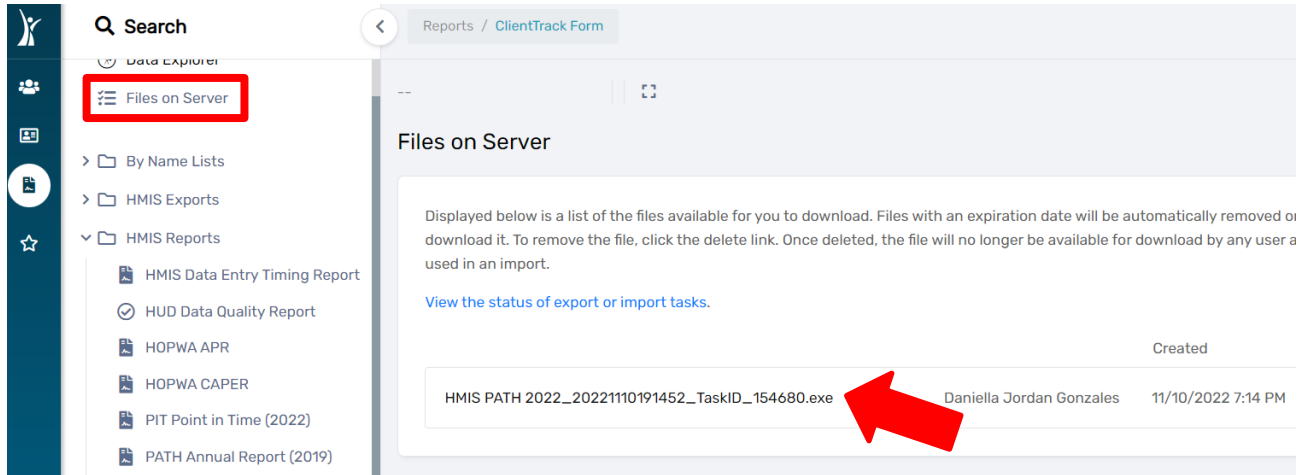
6. The **“Export Encryption”** box will appear. Enter a password of your choice in the **“Password”** and **“Confirm Password”** field. Next, click **“Done”**.



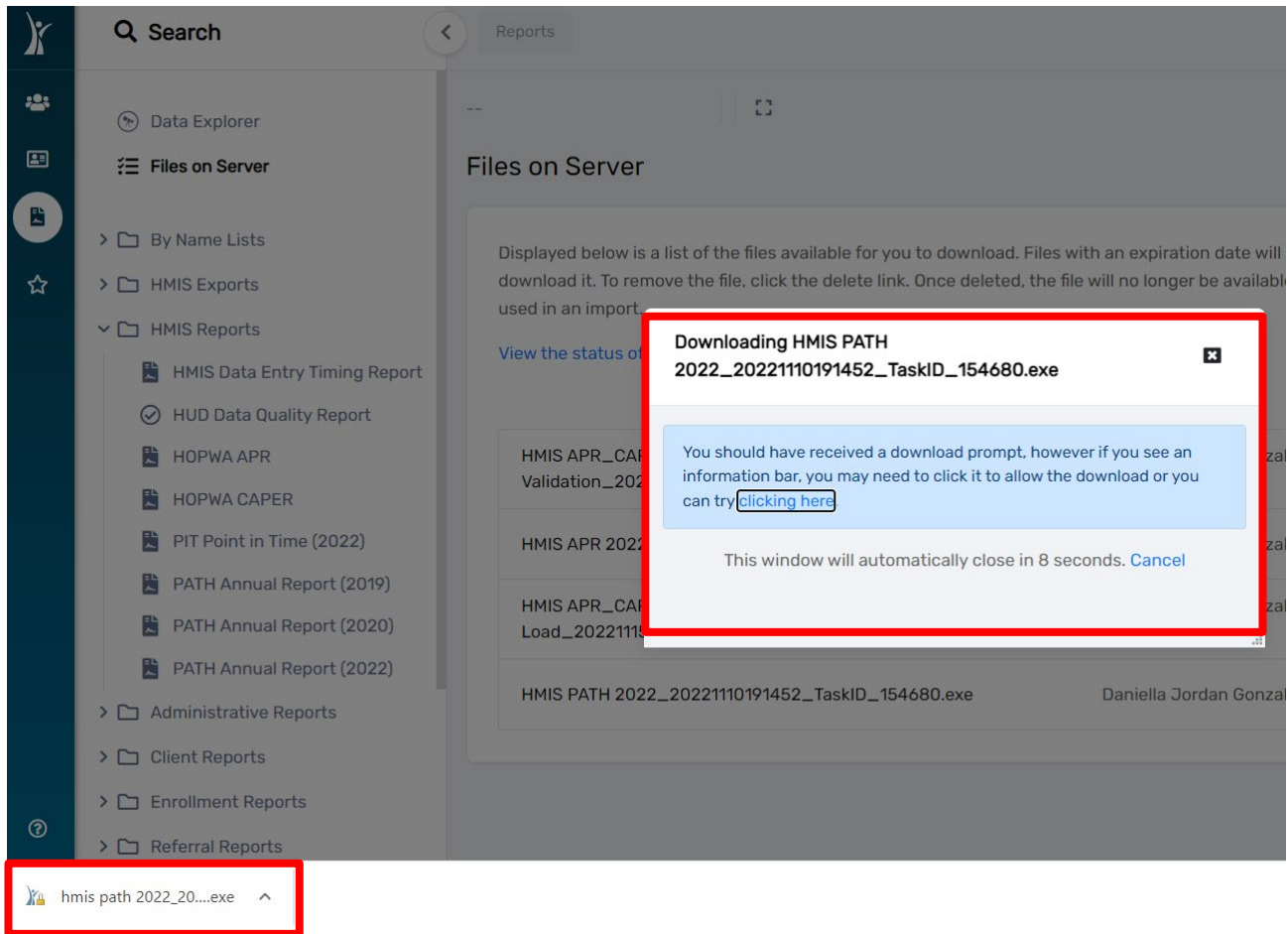
7. A pop-up box will appear informing you the report has been queued. Click **“OK”**.



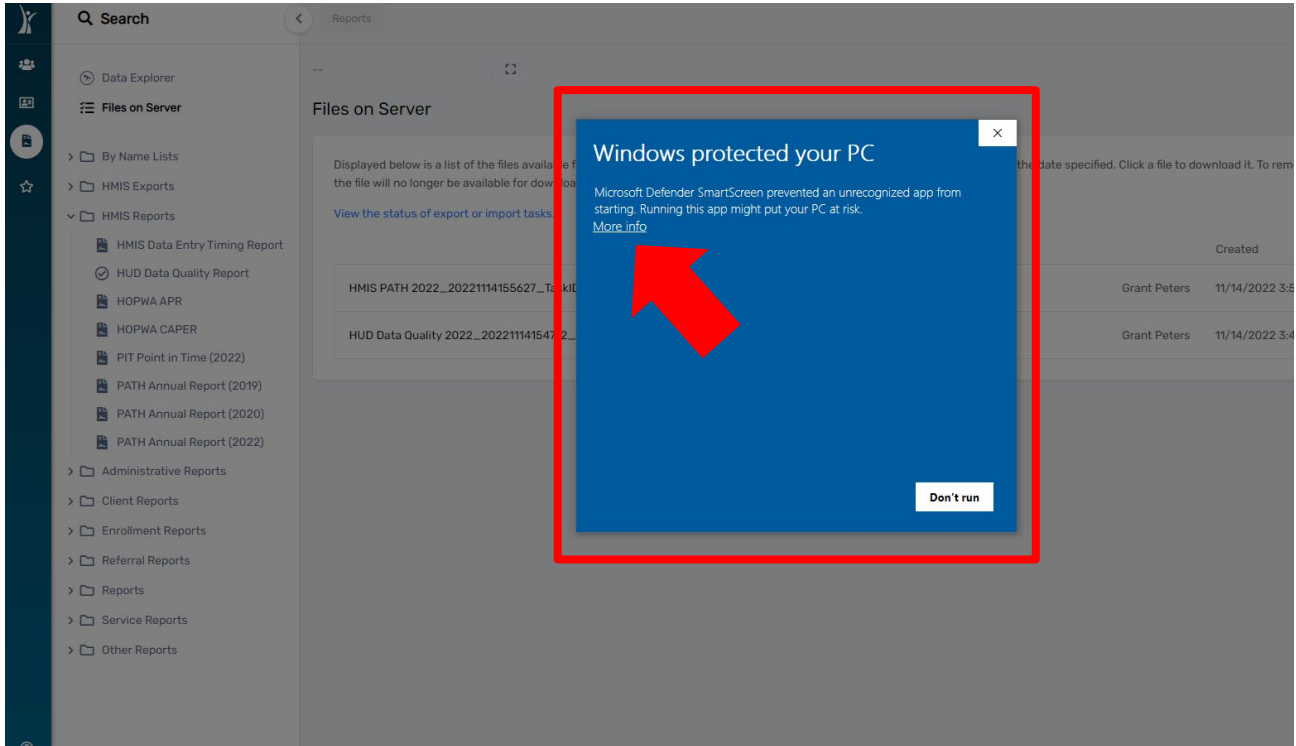
8. The report will appear in the **“Files on Server”** option located at the left-hand side of the screen. To check if the report is ready, click on **“Files on Server”**. The report will appear if it is ready for viewing. To download the file, click anywhere on **“HMIS PATH 2022”** file name as shown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



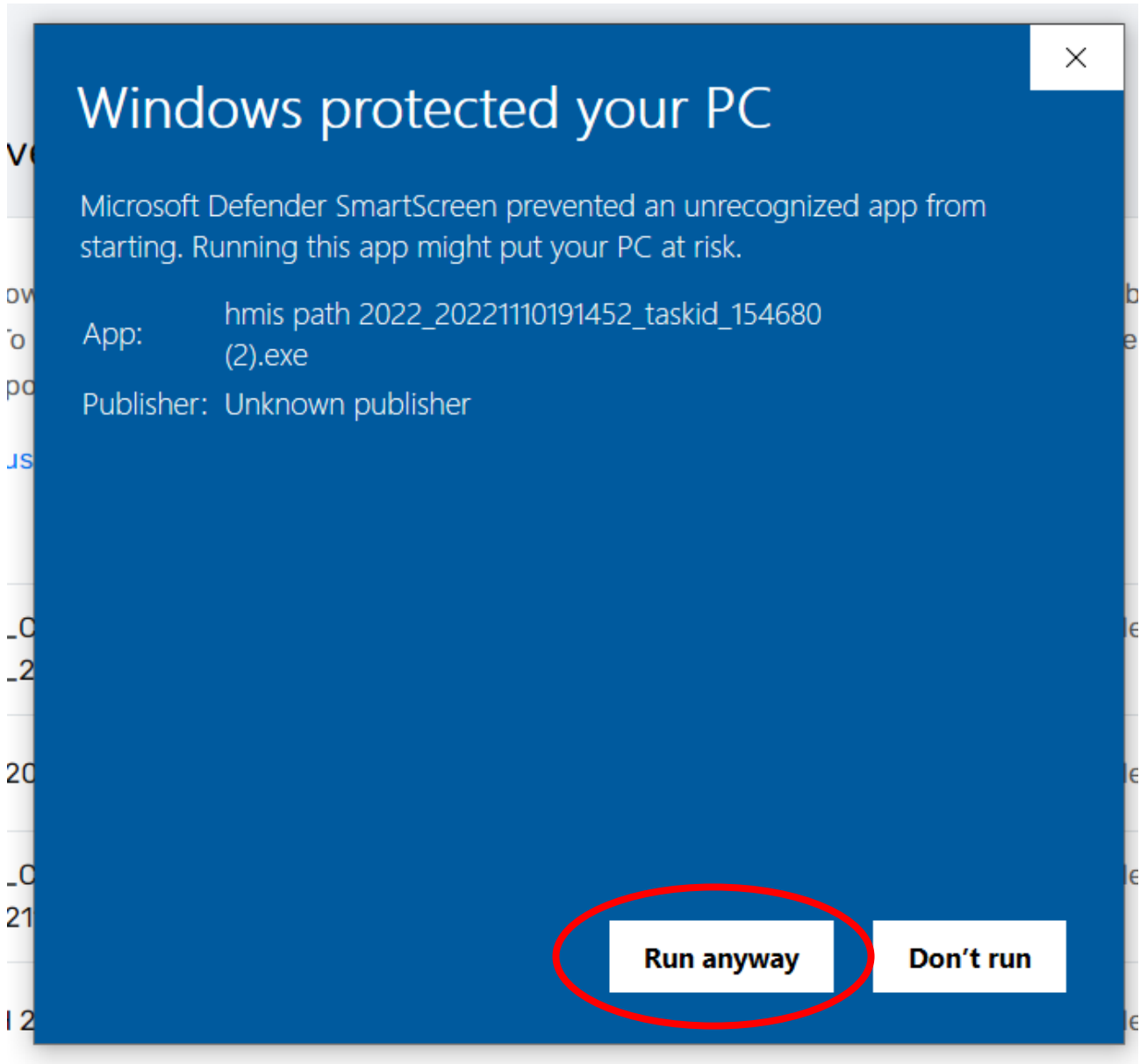
8. A pop-up window will appear, and the Export will show as a download in the bottom left corner of the screen as shown below. Click on the **“hmis path2022.exe”** to open the download.



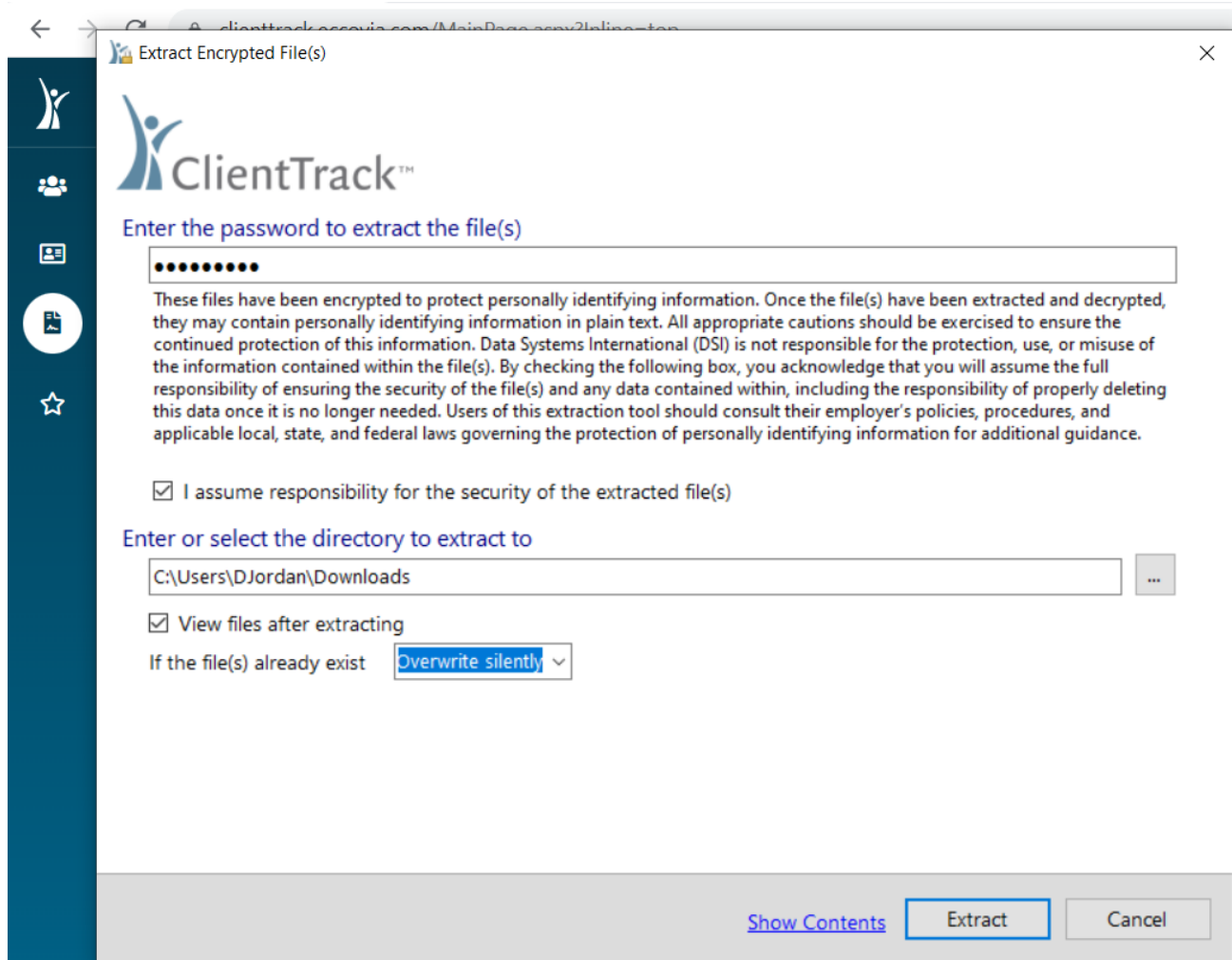
9. A pop-up window will show called “Windows protected your PC”. Click on “More Info” as shown below.



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.



14. For additional assistance please email the

HMISHelpDesk@ihcda.in.gov

Updated September 2023

