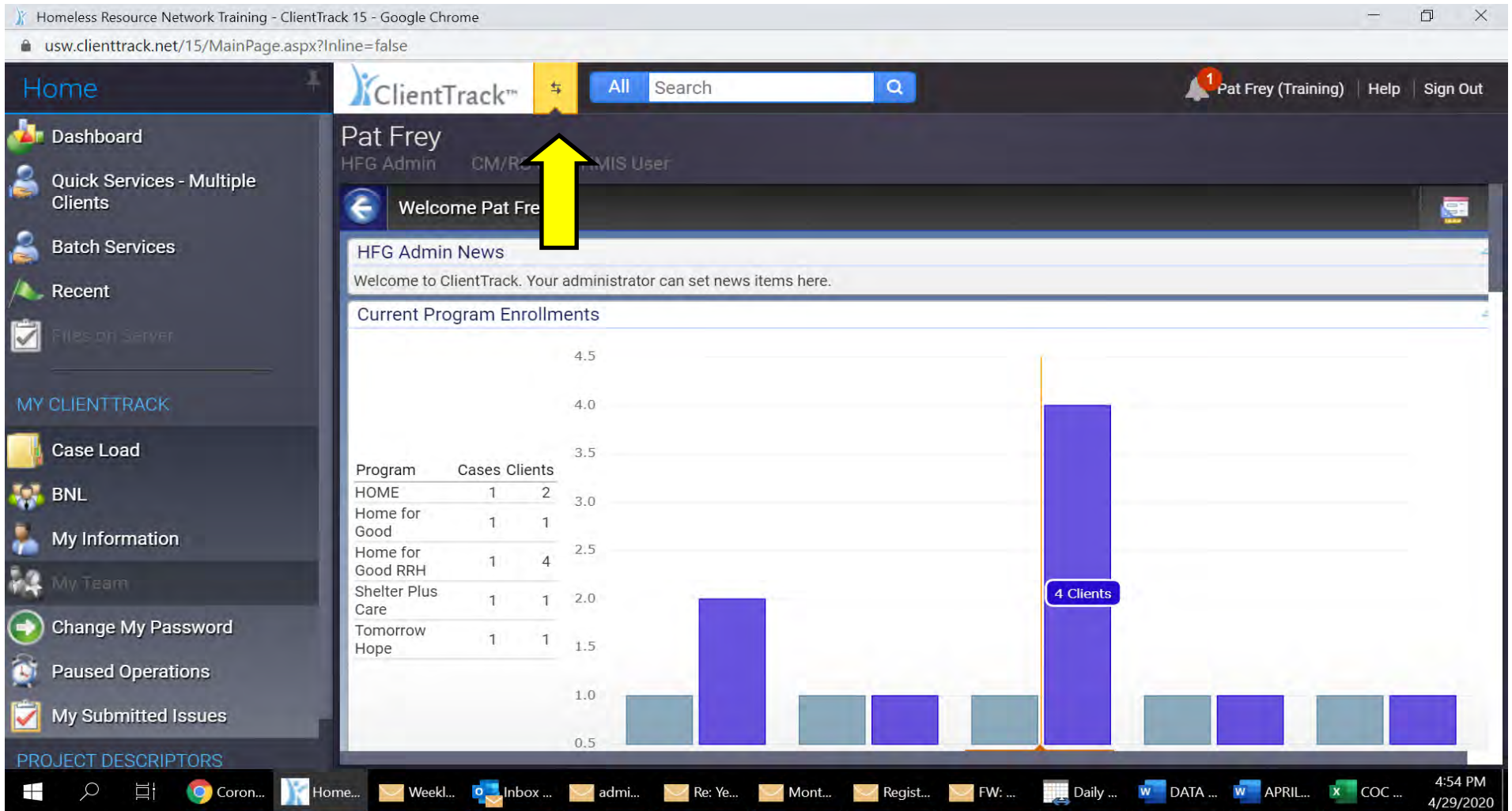


ClientTrack User Dashboard: *Home*

You will land here when initially opening ClientTrack or by navigating to using the button below



Workflow Carousel

This is where you land when you click the button on previous slide. Easily takes you to different areas of ClientTrack

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

Home

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

Pat Frey
HFG Admin CM/RC CoC: HMIS User

Welcome Pat Frey

HFG Admin News
Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

Program	Cases	Clients
Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1

HOME
Pat Frey
HFG Admin
CM/RC CoC: HMIS User

CLIENTS
pat Brady
8/1/1967
Female
CLIENT ID
414531

HOUSING

Coordinated Entry System HOME Home for Good Home for Good RRH Shelter Plus Care Tomorrow Hope

PROJECT DESCRIPTORS

11:42 AM
5/1/2020

NAVIGATING THE CAROUSEL

Click the button below to move the carousel to your desired location

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ Reports All Search

Pat Frey (Training) Help Sign Out

Welcome Pat Frey

HFG Admin News
Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

HOME
Pat Frey
HFG Admin
CM/RC CoC: HMIS User

CLIENTS
pat Brady
8/1/1967
Female
CLIENT ID
414531

HOUSING

PROVIDERS

Next

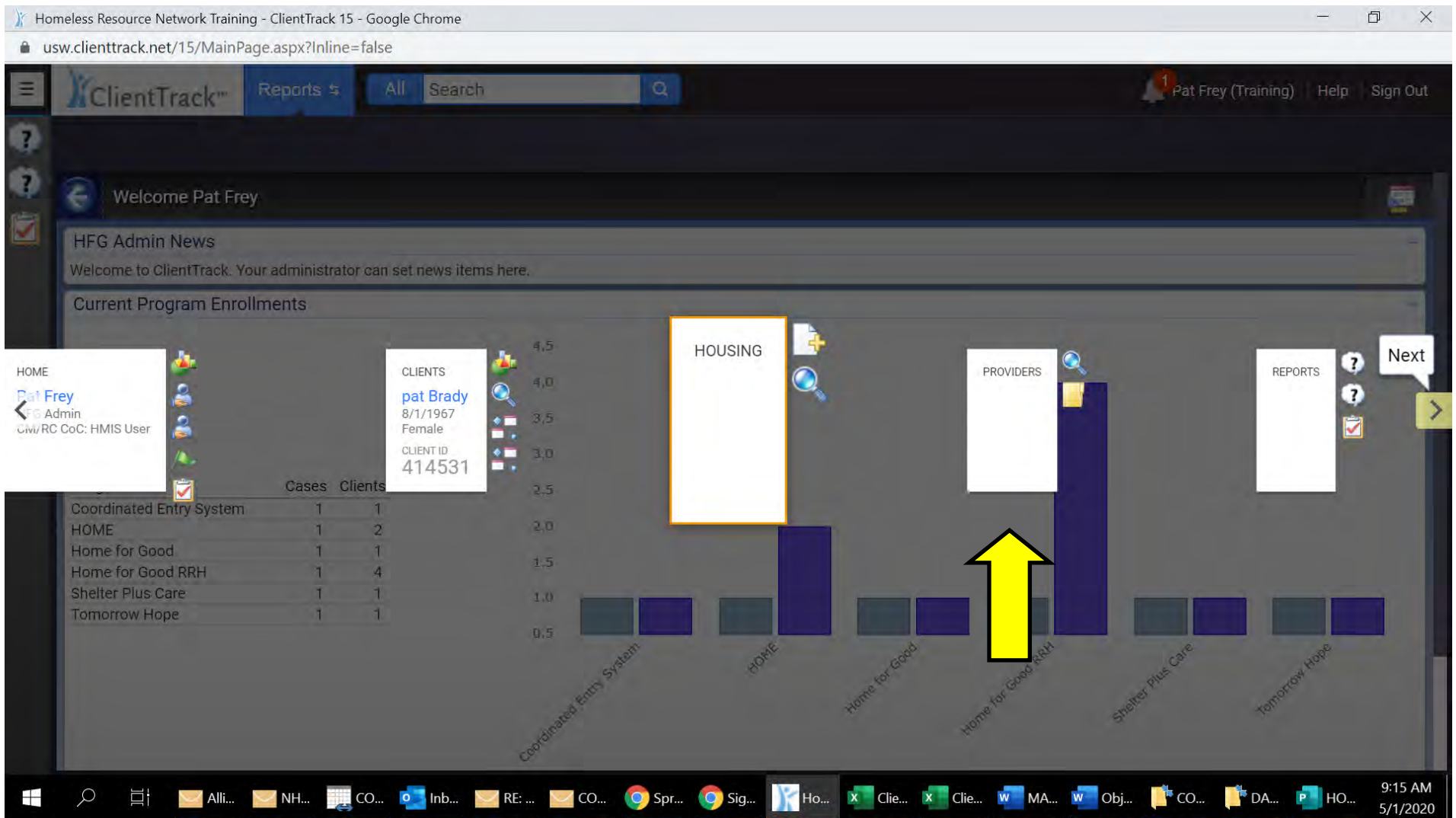
Program

Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1

9:14 AM
5/1/2020

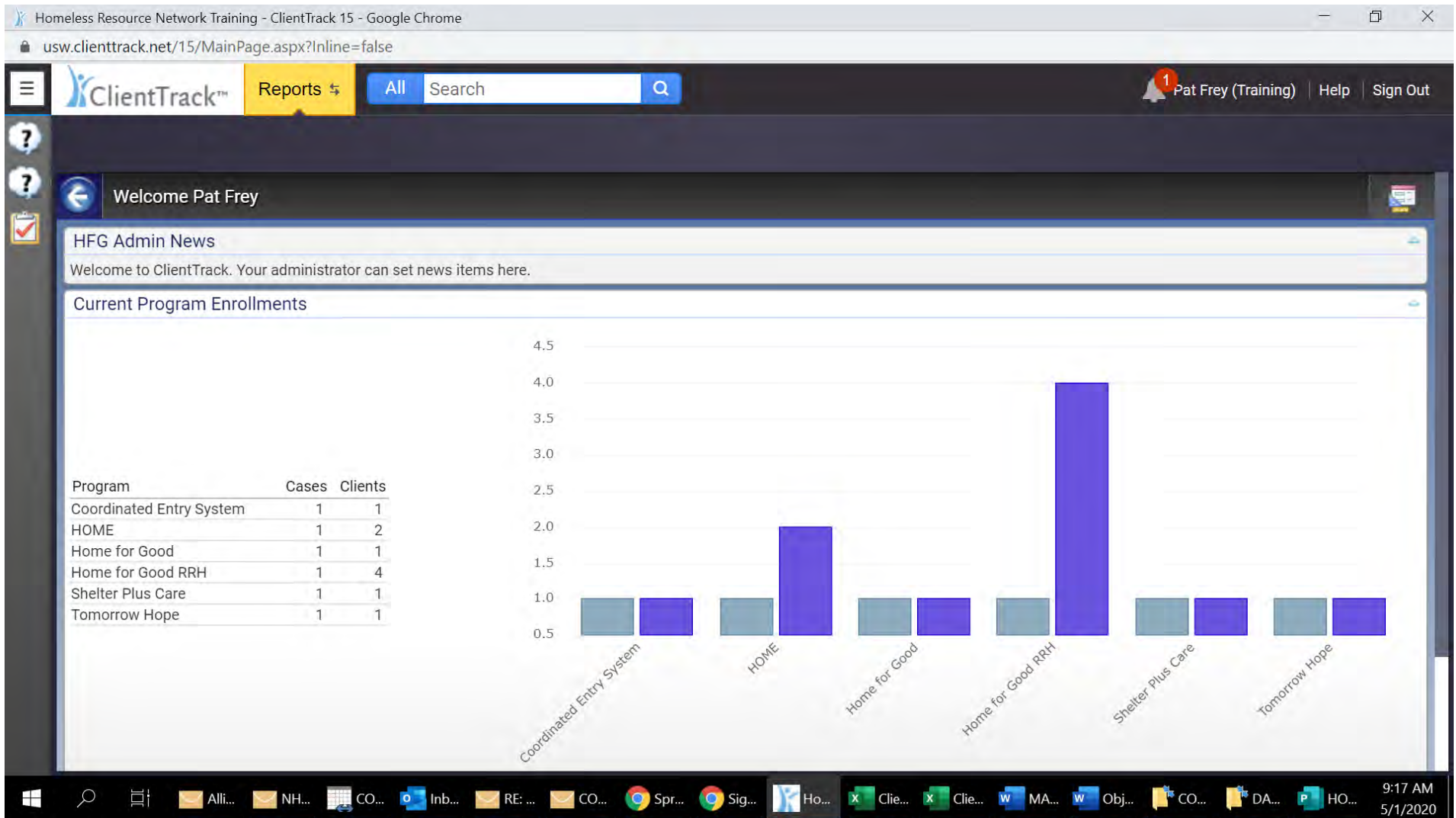
REPORTS SECTION

Continue to click to reveal the REPORTS section and click where noted below



REPORTS HOME PAGE

From this page you will access the reports for your program(s)



REPORTS MENU

Click the button below to open the REPORTS menu

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ Reports All Search

Pat Frey (Training) Help Sign Out

Show the menu

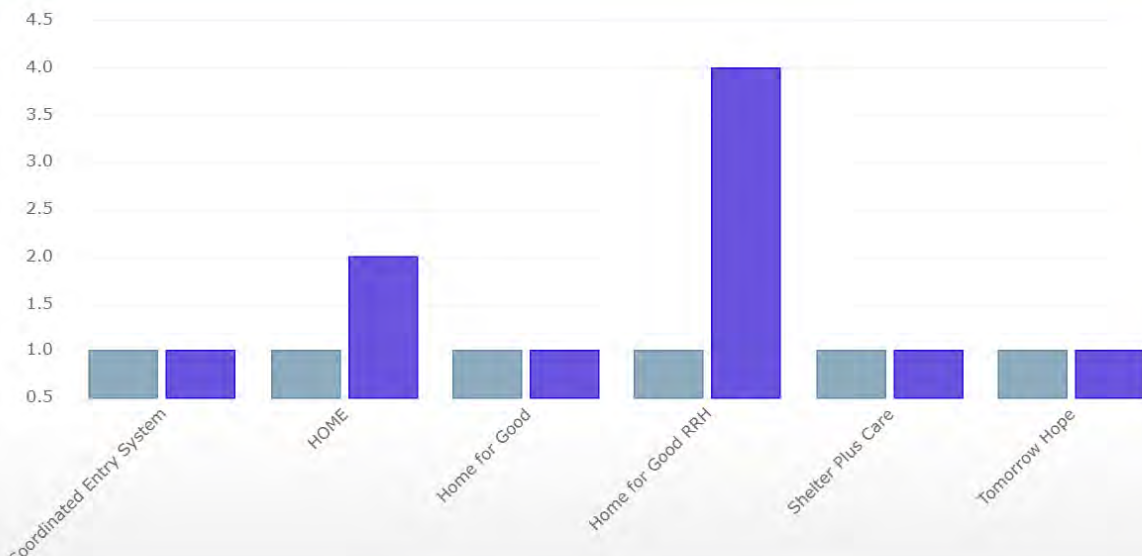
Welcome Pat Frey

HFG Admin News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

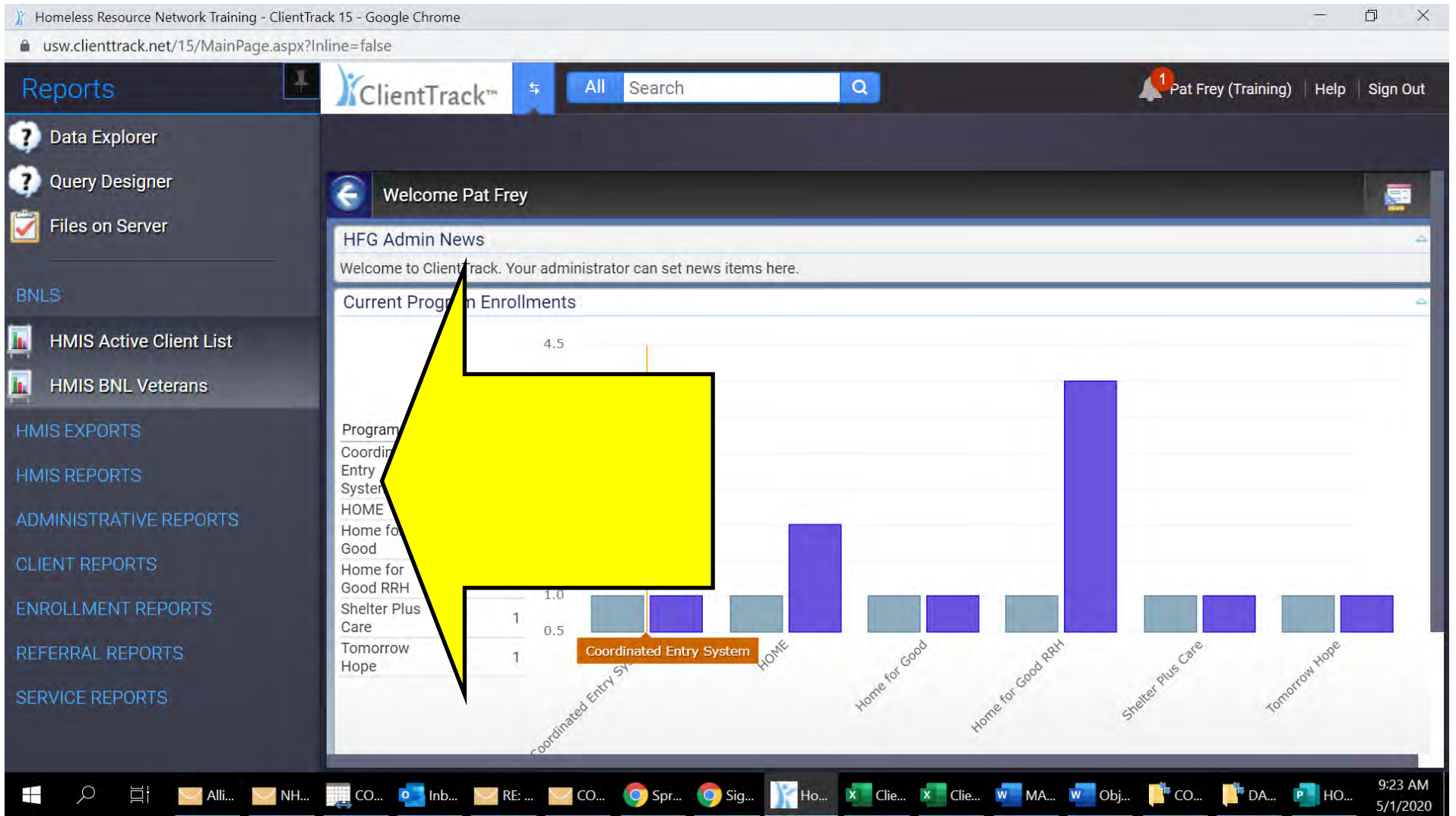
Program	Cases	Clients
Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1



9:18 AM 5/1/2020

REPORT TYPES

You now see the list of report types revealed in the menu bar on the left



HMIS REPORTS

The HUD Data Quality Detail Report is located in the HMIS REPORTS section. Click HMIS REPORTS as shown below open to open the HMIS REPORTS Menu

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Reports

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

?

Data Explorer

?

Query Designer

Files on Server

BNLS

HMIS Active Client List

HMIS BNL Veterans

HMIS EXPORTS

HMIS REPORTS

ADMINISTRATIVE REPORTS

CLIENT REPORTS

ENROLLMENT REPORTS

REFERRAL REPORTS

SERVICE REPORTS

Welcome Pat Frey

HFG Admin News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

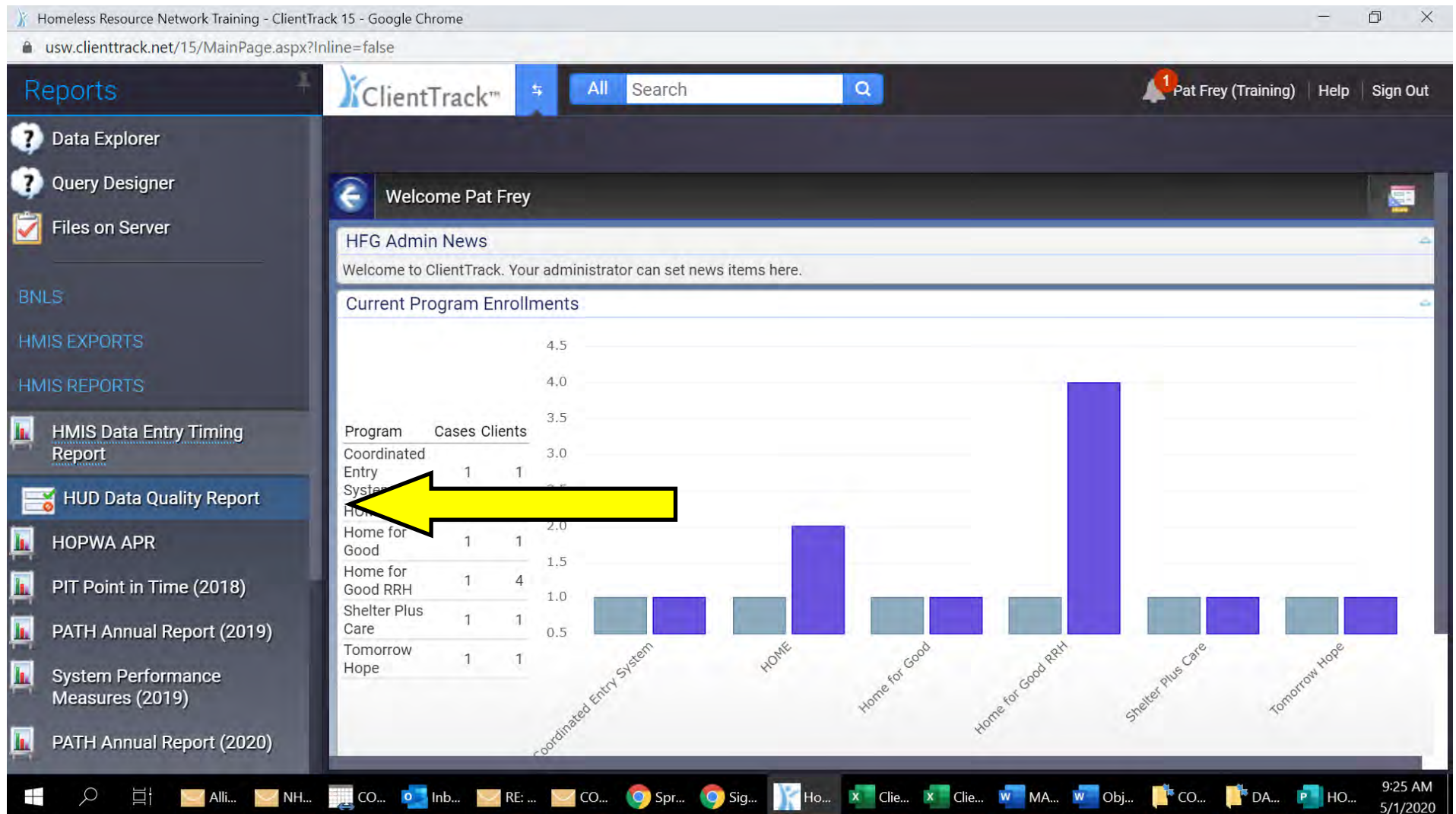
Program	Cases	Clients
Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1

9:24 AM 5/1/2020

HUD DATA QUALITY REPORT

Click to open the HUD DATA QUALITY REPORT

The HUD DATA QUALITY DETAIL REPORT is run as an export of the HUD DATA QUALITY REPORT. We are almost there..



SETTING REPORT PARAMETERS

You will set the parameters exactly as they were set for the HUD Data Quality Report.

Always run the HUD Data Quality Report prior to running the Detail Report.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report**
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

2018 HUD Data Quality Report

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 of the settings in the Save As field, select the report criteria, and run the 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 this report. Only records that fall within the date range you select will be included.

Date Range List: Since This Date, Last Year

Begin Date: 05/01/2019 to 05/01/2020

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 shows organizations you are authorized to view.

Organization: *

- 2-1-1
- Columbus Consolidated Governments
- Coordinated Entry System
- CVJM
- Damascus Way
- Department of Community Affairs

Grant(s) - This 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.

Report Schedule Report Cancel

9:27 AM 5/1/2020

REPORT DATES

Click the button below to set the begin date for your report.

A calendar will appear. Use the arrows on the calendar to move it to your desired start date

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Reports

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

2018 HUD Data Quality Report

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 of the settings in the Save As field, select the criteria, and run the 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: 05/01/2019 to 05/01/2020

Organization - Indicate which organizations should be included in the report. The list only shows organizations you are authorized to view.

Organization: *

2-1-1
Columbus
Coordinate
CVJM
Damascus
Department

May, 2019

Today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
Prev. month (hold for menu)						

Grant(s) - This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant appropriately, or click the icon to select all. Note:

Report Schedule Report Cancel

9:28 AM 5/1/2020

REPORT DATES

Click the button below to set the end date for your report.

A calendar will appear. Use the arrows on the calendar to move it to your desired end date

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) | Help | Sign Out

Reports

Data Explorer

Query Designer

Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

HMIS Data Entry Timing Report

HUD Data Quality Report

HOPWA APR

PIT Point in Time (2018)

PATH Annual Report (2019)

System Performance Measures (2019)

PATH Annual Report (2020)

2018 HUD Data Quality Report

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 of the settings in the Save As field, select the report criteria, and run the 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 this report. Only records that fall within the date range you select will be included.

Date Range List: -- SELECT --

Begin Date: 01/01/2019 to 05/01/2020

End Date

Choose the date

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 shows organizations you are authorized to view.

Organization: *

- 2-1-1
- Columbus Consolidated Governments
- Coordinated Entry System
- CVJM
- Damascus Way
- Department of Community Affairs

Grant(s) - This 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.

Report Schedule Report Cancel

9:29 AM 5/1/2020

ORGANIZATION

Your organization will appear in the box below

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ All Search

Pat Frey (Training) | Help | Sign Out

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report**
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

2018 HUD Data Quality Report


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 of the settings in the Save As field, select the report criteria, and run the 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 this report. Only records that fall within the date range you select will be included.

Date Range List: -- SELECT --

Begin Date: 01/01/2019 to 03/31/2020

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 shows organizations you are authorized to view.

Organization: *

- 2-1-1 
- Columbus Consolidated Governments
- Coordinated Entry System
- CVJM
- Damascus Way
- Department of Community Affairs

Grant(s) - This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting

Report Schedule Report Cancel

9:30 AM 5/1/2020

ORGANIZATION

Be sure your organization is checked as illustrated below

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) | Help | Sign Out

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report**
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

2018 HUD Data Quality Report

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 of the settings in the Save As field, select the report criteria, and run the 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 this report. Only records that fall within the date range you select will be included.

Date Range List: -- SELECT --

Begin Date: 01/01/2019 to 03/31/2020

Organization - Indicate which organizations should be included in the report by selecting each organization separately, or click the green checkmark icon to select all. Note: The list only shows organizations you are authorized to view.

Organization: *

- Department of Community Affairs
- Enrichment Services Program
- ☒ HFG Admin
- Home for Good
- Homeless Resource Network
- Homeless Resource Network - HS
- Hope Harbour

Grant(s) - This 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 green checkmark icon to select all.

Report Schedule Report Cancel

9:31 AM 5/1/2020

SELECTING PROGRAM

Click Filter by Program to select the Program for which you are running the report. To ensure an accurate report, select only one program per report

The screenshot shows the ClientTrack 15 web application interface. The left sidebar contains navigation links for Reports, Data Explorer, Query Designer, Files on Server, BNLS, HMIS EXPORTS, HMIS REPORTS, and various report types including HUD Data Quality Report, HOPWA APR, PIT Point in Time (2018), PATH Annual Report (2019), System Performance Measures (2019), and PATH Annual Report (2020). The main content area displays the configuration for the '2018 HUD Data Quality Report'. A dropdown menu is open, showing a list of programs: HFG Admin, Home for Good, Homeless Resource Network, Homeless Resource Network - HS, and Hope Harbour. Below this, the 'Grant(s)' section includes a 'Filter by Grant(s)' checkbox. The 'Program' section includes a 'Program Type' dropdown set to '-- SELECT --' and a 'Filter by Program' checkbox, which is highlighted by a yellow arrow. The 'CoC Filter' section includes a 'State Filter for CoC' dropdown set to '-- SELECT --' and a 'CoC (Optional)' dropdown set to '-- SELECT --'. At the bottom, there are buttons for 'Report', 'Schedule Report', and 'Cancel'. The Windows taskbar at the bottom shows the time as 9:33 AM on 5/1/2020.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

Pat Frey (Training) | Help | Sign Out

2018 HUD Data Quality Report

Grant(s): ☐ Filter by Grant(s)

Program: ☐ Filter by Program

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). 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: -- SELECT --

CoC (Optional): -- SELECT --

Report Schedule Report Cancel

9:33 AM 5/1/2020

PROGRAM SELECTION

Select the program by scrolling down and clicking the program for which you want to run the report. Please be sure only one program is checked.

The screenshot shows the ClientTrack 15 web application interface. The top navigation bar includes the ClientTrack logo, a search bar, and user information (Pat Frey (Training), Help, Sign Out). The left sidebar contains a 'Reports' section with various report options, including 'HUD Data Quality Report' which is currently selected. The main content area displays the '2018 HUD Data Quality Report' page. It features a list of organizations (HFG Admin, Home for Good, Homeless Resource Network, Homeless Resource Network - HS, Hope Harbour) and a list of programs (Community Case Management, Connection Coordination, Coordinated Entry System, Day Center, GED Classes, Grace House). A yellow arrow points to the 'Program' dropdown menu, indicating the selection process. The bottom of the page has buttons for 'Report', 'Schedule Report', and 'Cancel'.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Reports

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

2018 HUD Data Quality Report

HFG Admin
Home for Good
Homeless Resource Network
Homeless Resource Network - HS
Hope Harbour

Grant(s) - This 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.

Grant(s): ☐ Filter by Grant(s)

Program - A list of programs based on the grant selected.

Program Type: -- SELECT --

Program: ☒ Filter by Program
Community Case Management
Connection Coordination
Coordinated Entry System
Day Center
GED Classes
Grace House

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).

Report Schedule Report Cancel

9:36 AM 5/1/2020

PROGRAM SELECTION

Select the program by scrolling down and clicking the program for which you want to run the report. Please be sure only one program is checked.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

Reports

Data Explorer

Query Designer

Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

HMIS Data Entry Timing Report

HUD Data Quality Report

HOPWA APR

PIT Point in Time (2018)

PATH Annual Report (2019)

System Performance Measures (2019)

PATH Annual Report (2020)

2018 HUD Data Quality Report

Grant(s)

Filter by Grant(s)

Program

Program Type: -- SELECT --

Program: Filter by Program

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).

Report Schedule Report Cancel

9:38 AM 5/1/2020

RUN EXPORT

Click Run Export below

The screenshot displays the ClientTrack 15 web application interface. The browser address bar shows the URL `usw.clienttrack.net/15/MainPage.aspx?Inline=false`. The application header includes the ClientTrack logo, a search bar, and user information for Pat Frey (Training). The left sidebar lists various reports, with 'HUD Data Quality Report' highlighted. The main content area is titled '2018 HUD Data Quality Report' and contains the following configuration options:

- Program Type:** A dropdown menu set to '-- SELECT --'.
- Program:** A list of programs with checkboxes. 'Coordinated Entry System' is selected and highlighted in blue. Other programs include Community Case Management, Connection Coordination, Day Center, GED Classes, and Grace House.
- CoC Filter:** A text box with instructions: "You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so). 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:** A dropdown menu set to '-- SELECT --'.
- CoC (Optional):** A dropdown menu set to '-- SELECT --'.
- Detail Export:** A text box with instructions: "Click the Run Export button to generate a separate task to generate the Detail Export. Indicate the SSN Masking to be used in the Detail Export."
- SSN Masking:** A dropdown menu set to 'XXX-XX-0000'.

A large yellow arrow points to the 'Run Export' button, which is located at the bottom right of the configuration area. Below the 'Run Export' button are three buttons: 'Report', 'Schedule Report', and 'Cancel'.

PASSWORD NEEDED

Insert a password and confirmation. Without the correct password, you will not be able retrieve your detail report.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) | Help | Sign Out

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

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.

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

CoC Filter - You may, or If specified, this CoC m locations identified for

Detail Export - Click the Indicate the SSN Mask

9:42 AM 5/1/2020

QUEING UP THE REPORT

Click **DONE** to que up report to run

The screenshot shows the ClientTrack 15 web application interface. The left sidebar lists various reports, including 'HUD Data Quality Report' which is currently selected. The main content area displays the 'Export Encryption' dialog box. The dialog box contains the following text and controls:

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.

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): ☐

A yellow arrow points to the **Done** button at the bottom right of the dialog box. The background shows the 'HUD Data Quality Report' selected in the sidebar and the 'CoC Filter' and 'Detail Export' sections partially visible.

REPORT IS SET TO RUN

You will get the pop up below indicating that your report is scheduled to run

The screenshot shows the ClientTrack 15 web application interface. On the left, a sidebar lists various reports, with 'HUD Data Quality Report' highlighted. The main area displays the configuration for this report, including options for encryption, password, and CSV formatting. A white pop-up window is centered on the screen, displaying the message: 'usw.clienttrack.net says Your export has been queued and will be processed at the next available time.' with an 'OK' button. A large yellow arrow points from the bottom of the pop-up towards the 'Encrypt Export' checkbox in the background configuration form. The top of the browser window shows the URL 'usw.clienttrack.net/15/MainPage.aspx?Inline=false' and the user 'Pat Frey (Training)' is logged in. The Windows taskbar at the bottom shows the time as 9:41 AM on 5/1/2020.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack

usw.clienttrack.net says

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

OK

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can be decrypted using the password you provide. Strong passwords are not enforced here, but passwords must be at least 8 characters long.

To encrypt your export, the file exported may contain person identifying information in appropriate cautions should be exercised to ensure the protection of this information.

Generated file(s) should include a header line at the beginning of the file that indicates what the CSV file represent and if values in the CSV should *always* be enclosed in double-

CoC Filter - You may, or If specified, this CoC m locations identified for

Detail Export - Click the Indicate the SSN Mask

Encrypt Export: ☒

Password: *

Confirm Password: *

Include Header Row in CSV ☒

File(s): ☒

Always Quote CSV Values(s): ☐

Done

9:41 AM 5/1/2020

Click OK below

The screenshot shows the ClientTrack 15 web application interface. On the left is a sidebar with navigation links: Reports, Data Explorer, Query Designer, Files on Server, BNLS, HMIS EXPORTS, HMIS REPORTS, and a list of reports including HMIS Data Entry Timing Report, HUD Data Quality Report (highlighted), HOPWA APR, PIT Point in Time (2018), PATH Annual Report (2019), System Performance Measures (2019), and PATH Annual Report (2020). The main content area displays a confirmation dialog box with the title "usw.clienttrack.net says". The message reads: "Your export has been queued and will be processed at the next available time." Below the message is a blue "OK" button. A yellow arrow points to the "OK" button. In the background, a "Detail Export" form is visible, containing sections for "CoC Filter" and "Detail Export" instructions, and fields for "Encrypt Export" (checked), "Password", "Confirm Password", "Include Header Row in CSV" (checked), "File(s)", and "Always Quote CSV Values(s)". The top right of the interface shows the user "Pat Frey (Training)" and links for "Help" and "Sign Out". The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 9:41 AM on 5/1/2020.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Reports

ClientTrack

usw.clienttrack.net says

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

OK

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 export 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.

CoC Filter - You may, or If specified, this CoC m locations identified for

Detail Export - Click the Indicate the SSN Mask

Encrypt Export: ☒

Password: *

Confirm Password: *

Include Header Row in CSV ☒

File(s):

Always Quote CSV Values(s): ☐

Done

Pat Frey (Training) | Help | Sign Out

9:41 AM 5/1/2020

FILES ON SERVER

Once you clicked OK, you will see this screen. You will not see the report you just scheduled to run here just yet.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™







All Search

Pat Frey (Training) | Help | Sign Out

Files on Server

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
  HUD Data Quality 2018_20200427164254_TaskID_90306.exe 	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
  HUD Data Quality 2018_20200427164248_TaskID_90305.exe 	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

Windows taskbar: 9:43 AM 5/1/2020

CHECK THE STATUS OF YOUR REPORT

Click to view will give you the status of the report you just scheduled

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ All Search Pat Frey (Training) Help Sign Out

Reports

- Data Explorer
- Query Designer
- Files on Server

BNLS

HMIS EXPORTS

HMIS REPORTS

- HMIS Data Entry Timing Report
- HUD Data Quality Report
- HOPWA APR
- PIT Point in Time (2018)
- PATH Annual Report (2019)
- System Performance Measures (2019)
- PATH Annual Report (2020)

javascript:void(0)

Files on Server

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
HUD Data Quality 2018_20200427164254_TaskID_90306.exe ?	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
HUD Data Quality 2018_20200427164248_TaskID_90305.exe ?	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

9:44 AM 5/1/2020

REPORTS SCHEDULED TO RUN

The reports you just scheduled will appear here. It typically takes 20 minutes for the report to run.

Click cancel to close this pop up

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Task List

Asynchronous Tasks

Below is a listing of tasks that are either queued to be completed or that have been completed in the last 40 Days. To view the full task detail, click the view details folder to the left of the task. To view a log of the task execution, upon task processing, completion or error, click view log. It's important to note that it a task begins its execution at the next available time based on overall system load.

Show only my tasks: ☐

Refreshing in 27 seconds **Refresh Now**

Displaying 1-200 of 599 results. [Next](#) [Last](#)

Task Name	Desired Start Time	End Time	Status	TaskID
Run CSV Export - HUD Data Quality 2018	05/01/2020 8:44AM		Not Started	90366
Run CSV Export - HUD Data Quality 2018	05/01/2020 8:41AM		Not Started	90365
Cache Cleanup	05/01/2020 5:00AM		Not Started	90364
End Expired Enrollment Accounts	05/01/2020 4:00AM	05/01/2020 4:04AM	Completed Successfully	90363
Missing ServiceFamilyInfo	05/01/2020 2:00AM	05/01/2020 2:10AM	Completed Successfully	90362
Check For Case Manager Assignments	05/01/2020 2:00AM	05/01/2020 2:04AM	Completed Successfully	90361
Get Database Size for history	05/01/2020 1:00AM	05/01/2020 1:10AM	Completed Successfully	90360
LSA Staging Data Clean-up	05/01/2020 1:00AM	05/01/2020 1:08AM	Completed Successfully	90359
AutoRun_Service CheckIn Month	05/01/2020 1:00AM	05/01/2020 1:23AM	Completed Successfully	90358
EDI Remove Past Staging Records	05/01/2020 1:00AM	05/01/2020 1:08AM	Completed Successfully	90357

Cancel

9:44 AM
5/1/2020

BACK TO FILES ON SERVER

Once you click cancel you will be taken back to this screen.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™







All Search

Pat Frey (Training) Help Sign Out

Files on Server

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[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
  HUD Data Quality 2018_20200427164254_TaskID_90306.exe 	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
  HUD Data Quality 2018_20200427164248_TaskID_90305.exe 	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

BNLS

HMIS EXPORTS

HMIS REPORTS

HMIS Data Entry Timing Report

HUD Data Quality Report

HOPWA APR

PIT Point in Time (2018)

PATH Annual Report (2019)

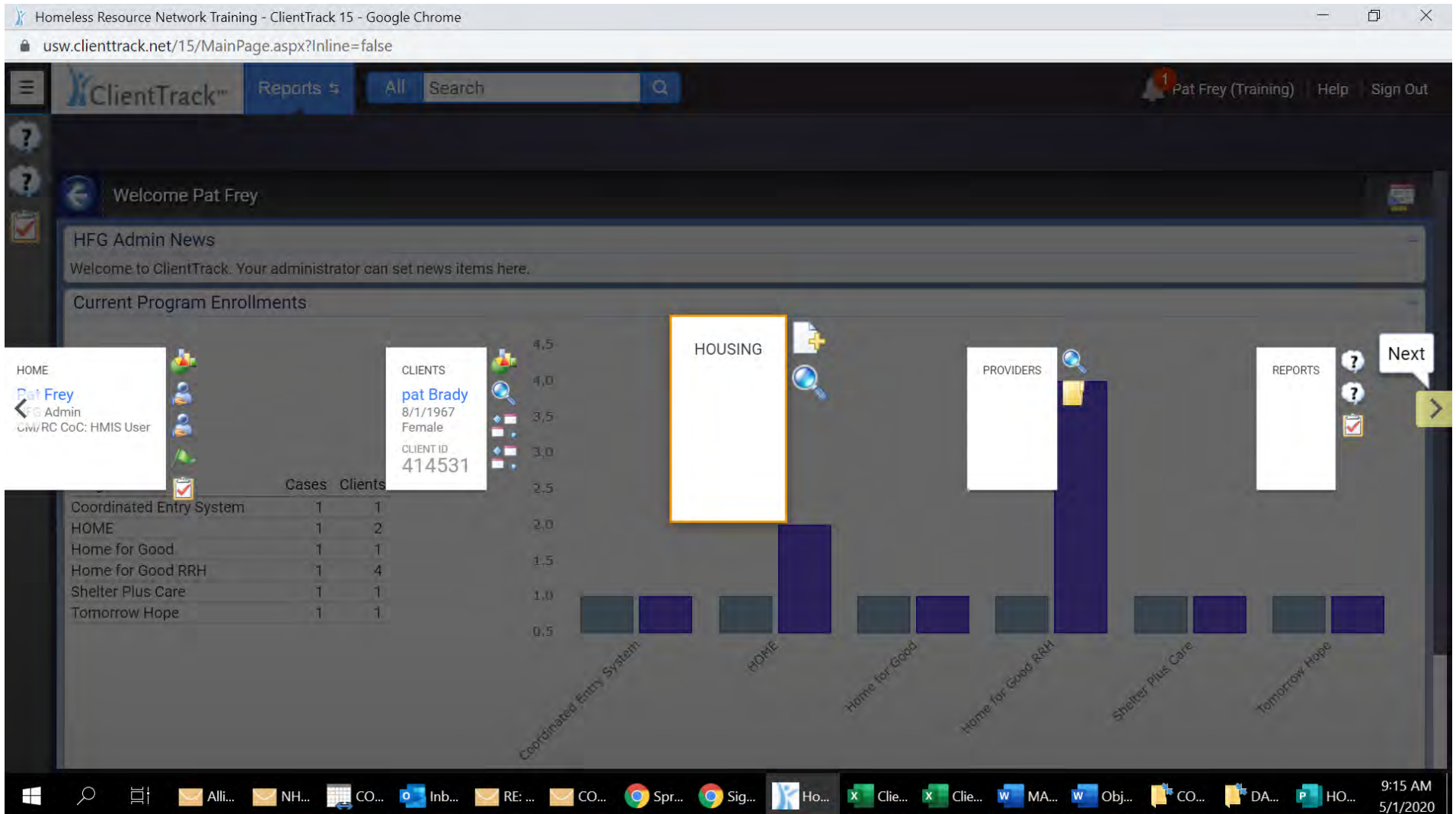
System Performance Measures (2019)

PATH Annual Report (2020)

9:48 AM 5/1/2020

RETRIEVING YOUR HUD DATA QUALITY DETAIL REPORT

After you have waited for at least 20 minutes for the report to run go back to the report section of ClientTrack



REPORT MENU

Open the Report Menu

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ Reports All Search

Pat Frey (Training) Help Sign Out

Welcome Pat Frey

HFG Admin News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

Program	Cases	Clients
Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1

Coordinated Entry System HOME Home for Good Home for Good RRH Shelter Plus Care Tomorrow Hope

Windows Taskbar: 11:41 AM 5/4/2020

FILES ON SERVER

Click Files on Server

Homeless Resource Network Training - ClientTrack 15 - Google Chrome
usw.clienttrack.net/15/MainPage.aspx?Inline=false

Reports

- Data Explorer
- Query Designer
- Files on Server**

BNLS

- HMIS Active Client List
- HMIS BNL Veterans

HMIS EXPORTS

HMIS REPORTS

ADMINISTRATIVE REPORTS

CLIENT REPORTS

ENROLLMENT REPORTS

REFERRAL REPORTS

SERVICE REPORTS

Welcome Pat Frey

h News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments

Program	Cases	Clients
Coordinated Entry System	1	1
HOME	1	2
Home for Good	1	1
Home for Good RRH	1	4
Shelter Plus Care	1	1
Tomorrow Hope	1	1

Coordinated Entry System

HOME

Home for Good

Home for Good RRH

Shelter Plus Care

11:42 AM 5/4/2020

FILES ON SERVER

The HUD Data Quality Detail report will appear as below

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false
















ClientTrack™ Reports All Search

Pat Frey (Training) Help Sign Out

Files on Server

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[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
  HUD Data Quality 2018_20200504144217_TaskID_90412.exe 	Pat Frey	5/4/2020 2:42:17 PM	6/3/2020 2:42:17 PM
  HUD Data Quality 2018_20200501155228_TaskID_90366.exe 	Pat Frey	5/1/2020 3:52:28 PM	5/31/2020 3:52:28 PM
  HUD Data Quality 2018_20200501155221_TaskID_90365.exe 	Pat Frey	5/1/2020 3:52:22 PM	5/31/2020 3:52:22 PM
  HUD Data Quality 2018_20200427164254_TaskID_90306.exe 	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
  HUD Data Quality 2018_20200427164248_TaskID_90305.exe 	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

Windows taskbar: 11:44 AM 5/4/2020

DOWNLOADING YOUR REPORT

Click the button with the green downward arrow next to your report

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false











ClientTrack™ Reports All Search

Pat Frey (Training) Help Sign Out

Files on Server

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File Name	Creator	Created	Expires
  HUD Data Quality 2018_20200504144217_TaskID_90412.exe ?	Pat Frey	5/4/2020 2:42:17 PM	6/3/2020 2:42:17 PM
  HUD Data Quality 2018_20200501155228_TaskID_90366.exe ?	Pat Frey	5/1/2020 3:52:28 PM	5/31/2020 3:52:28 PM
  HUD Data Quality 2018_20200501155221_TaskID_90365.exe ?	Pat Frey	5/1/2020 3:52:22 PM	5/31/2020 3:52:22 PM
  HUD Data Quality 2018_20200427164254_TaskID_90306.exe ?	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
  HUD Data Quality 2018_20200427164248_TaskID_90305.exe ?	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

Windows taskbar: Calendar - p... 7 Reminder(s) Agenda Ma... Objective U... Governor C... Sign in to Cl... Homeless R... HOW TO RU... APRIL 2020 ... 11:55 AM 5/4/2020

DOWNLOAD

One you have clicked the button with the green down arrow you will get this pop up

The screenshot shows the ClientTrack 15 web application interface. The left sidebar contains navigation links: Reports, Data Explorer, Query Designer, Files on Server, BNLS, HMIS Active Client List, HMIS BNL Veterans, HMIS EXPORTS, HMIS REPORTS, ADMINISTRATIVE REPORTS, CLIENT REPORTS, ENROLLMENT REPORTS, and REFERRAL REPORTS. The main content area displays 'Files on Server' with a list of files. A warning message at the top right states: 'Please review your recovery information. Your recovery information is used to recover your account if you forget your password. Review it now'. A download progress bar at the top indicates 'Downloading HUD Data Quality 2018_20200501155228_T...'. A modal dialog box in the center reads: 'You should have received a download prompt, however if you see an information bar, you may need to click it to allow the download or you can try clicking here. This window will automatically close in 13 seconds. Close Window'. The bottom status bar shows the URL: 'https://usw.clienttrack.net/15/ImportExport/ExportStandard.aspx?FileName=HUD Data Quality 2018_20200501155228_TaskID_90366.exe' and a taskbar notification for 'HUD Data Quality....exe Failed - Virus detected'.

Homeless Resource Network Training - ClientTrack 15 - Google Chrome

usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™

All Search

Pat Frey (Training) Help Sign Out

Reports

Data Explorer

Query Designer

Files on Server

BNLS

HMIS Active Client List

HMIS BNL Veterans

HMIS EXPORTS

HMIS REPORTS

ADMINISTRATIVE REPORTS

CLIENT REPORTS

ENROLLMENT REPORTS

REFERRAL REPORTS

Please review your recovery information
Your recovery information is used to recover your account if you forget your password.
[Review it now](#)

Files on Server

Displayed below is a list of the files available for you on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#)

Downloading HUD Data Quality 2018_20200501155228_T...

You should have received a download prompt, however if you see an information bar, you may need to click it to allow the download or you can try [clicking here](#).

This window will automatically close in 13 seconds.
[Close Window](#)

Created	Expires
5/1/2020 3:52:28 PM	5/31/2020 3:52:28 PM
5/1/2020 3:52:22 PM	5/31/2020 3:52:22 PM
4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

https://usw.clienttrack.net/15/ImportExport/ExportStandard.aspx?FileName=HUD Data Quality 2018_20200501155228_TaskID_90366.exe

HUD Data Quality....exe
Failed - Virus detected

Show all

12:19 PM
5/1/2020

SAVING THE DOWNLOAD

It is always best to save the download prior to running it. Select save below

(If you do not get the option box below your report most likely auto downloaded to your downloads folder. See slide 36 for next step)

The screenshot shows the ClientTrack 15 web application in a Microsoft Edge browser. The address bar displays the URL: <https://usw.clienttrack.net/15/MainPage.aspx?Inline=false>. The user is logged in as Pat Frey (Training). A notification banner at the top right says: "Please review your recovery information. Your recovery information is used to recover your account if you forget your password. [Review it now](#)".

The main content area is titled "Files on Server" and contains a list of files available for download. The list has columns for File Name, a status icon, and Expires. The files listed are:

File Name	Status	Expires
HUD Data Quality 2018_20200501155	Download icon	5/31/2020 3:52:28 PM
HUD Data Quality 2018_20200501155	Download icon	5/31/2020 3:52:22 PM
HUD Data Quality 2018_20200427164	Download icon	5/27/2020 4:42:55 PM
HUD Data Quality 2018_20200427164	Download icon	5/27/2020 4:42:49 PM

A modal dialog box titled "Downloading HUD Data Quality 2018_20200501155228_T..." is open in the center. It contains the text: "You should have received a download prompt, however if you see an information bar, you may need to click it to allow the download or you can try [clicking here](#)." Below this text is a globe icon and the message: "This window will automatically close in 7 seconds. [Close Window](#)".

At the bottom of the screen, a Windows taskbar shows the Start button, a search bar, and several application icons. A yellow arrow points to a Windows security notification box that says: "What do you want to do with HUD Data Quality 2018_20200501155228_TaskID_90366.exe? From: usw.clienttrack.net". The box has "Run" and "Cancel" buttons.

SAVING TO A DESIGNATION LOCATION

You will choose where to save your downloaded report

Homeless Resource Network Training - ClientTrack 15 - Microsoft Edge

https://usw.clienttrack.net/15/MainPage.aspx?Inline=false
















ClientTrack™ Reports All Search


Pat Frey (Training) | Help | Sign Out

Files on Server

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[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
  HUD Data Quality 2018_20200504144217_TaskID_90412.exe 	Pat Frey	5/4/2020 2:42:17 PM	6/3/2020 2:42:17 PM
  HUD Data Quality 2018_20200501155228_TaskID_90366.exe 	Pat Frey	5/1/2020 3:52:28 PM	5/31/2020 3:52:28 PM
  HUD Data Quality 2018_20200501155221_TaskID_90365.exe 	Pat Frey	5/1/2020 3:52:22 PM	5/31/2020 3:52:22 PM
  HUD Data Quality 2018_20200427164254_TaskID_90306.exe 	Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
  HUD Data Quality 2018_20200427164248_TaskID_90305.exe 	Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM



What do you want to do with HUD Data Quality 2018_20200501155228_TaskID_90366.exe?
From: usw.clienttrack.net

Run Save as Save Cancel

Type here to search

1:13 PM 5/4/2020

DESIGNATED FOLDER LOCATION FOR YOUR REPORTS

Once you have clicked “Save As” you will be promoted to select a location for your report. The more specific you get in setting up folders for your various reports and reporting dates the easier they will be to locate when you are looking for them. It is always a good idea to include the date run in the folder name. Click Save

The screenshot shows a 'Save As' dialog box in the foreground, overlaid on a web application interface. The dialog box is titled 'Save As' and shows the file path 'Dow... > HUD DQ MAY 20...'. A yellow arrow points to the folder name 'HUD DQ MAY 20...'. The file name is 'HUD Data Quality 2018_20200501155228_TaskID_90366' and the save type is 'Application'. Another yellow arrow points to the 'Save' button. The background shows a web application with a header 'Pat Frey (Training) | Help | Sign Out' and a table of data. A small dialog box at the bottom asks 'What do you want to do with HUD Data Quality 2018_20200501155228_TaskID_90366.exe? From: usw.clienttrack.net' with buttons 'Run', 'Save', and 'Cancel'.

Creator	Created	Expires
Pat Frey	5/4/2020 2:42:17 PM	6/3/2020 2:42:17 PM
Pat Frey	5/1/2020 3:52:28 PM	5/31/2020 3:52:28 PM
Pat Frey	5/1/2020 3:52:22 PM	5/31/2020 3:52:22 PM
Pat Frey	4/27/2020 4:42:55 PM	5/27/2020 4:42:55 PM
Pat Frey	4/27/2020 4:42:49 PM	5/27/2020 4:42:49 PM

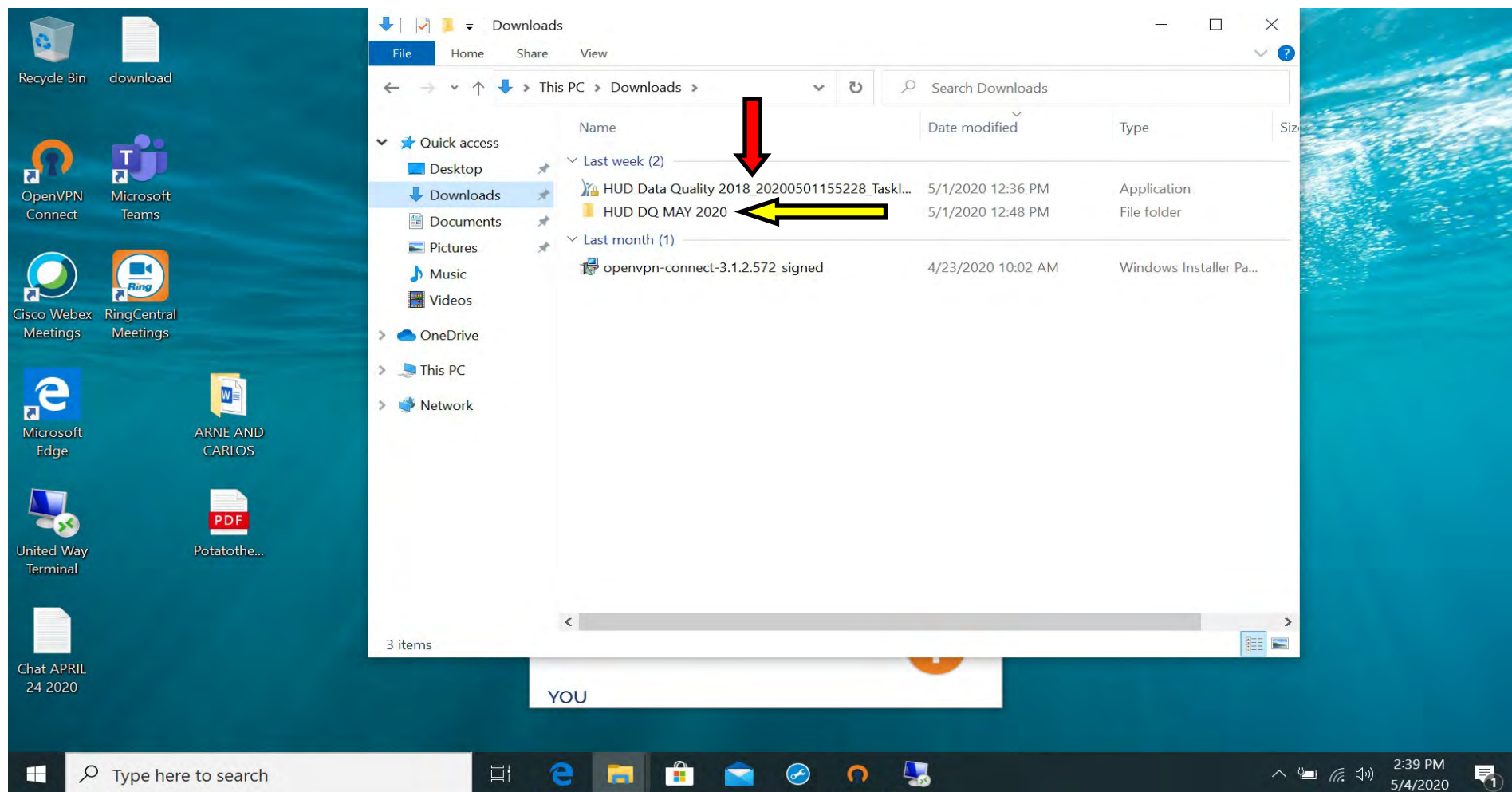
What do you want to do with HUD Data Quality 2018_20200501155228_TaskID_90366.exe?
From: usw.clienttrack.net

Run Save Cancel

OPENING YOUR SAVED DOWNLOADED REPORT

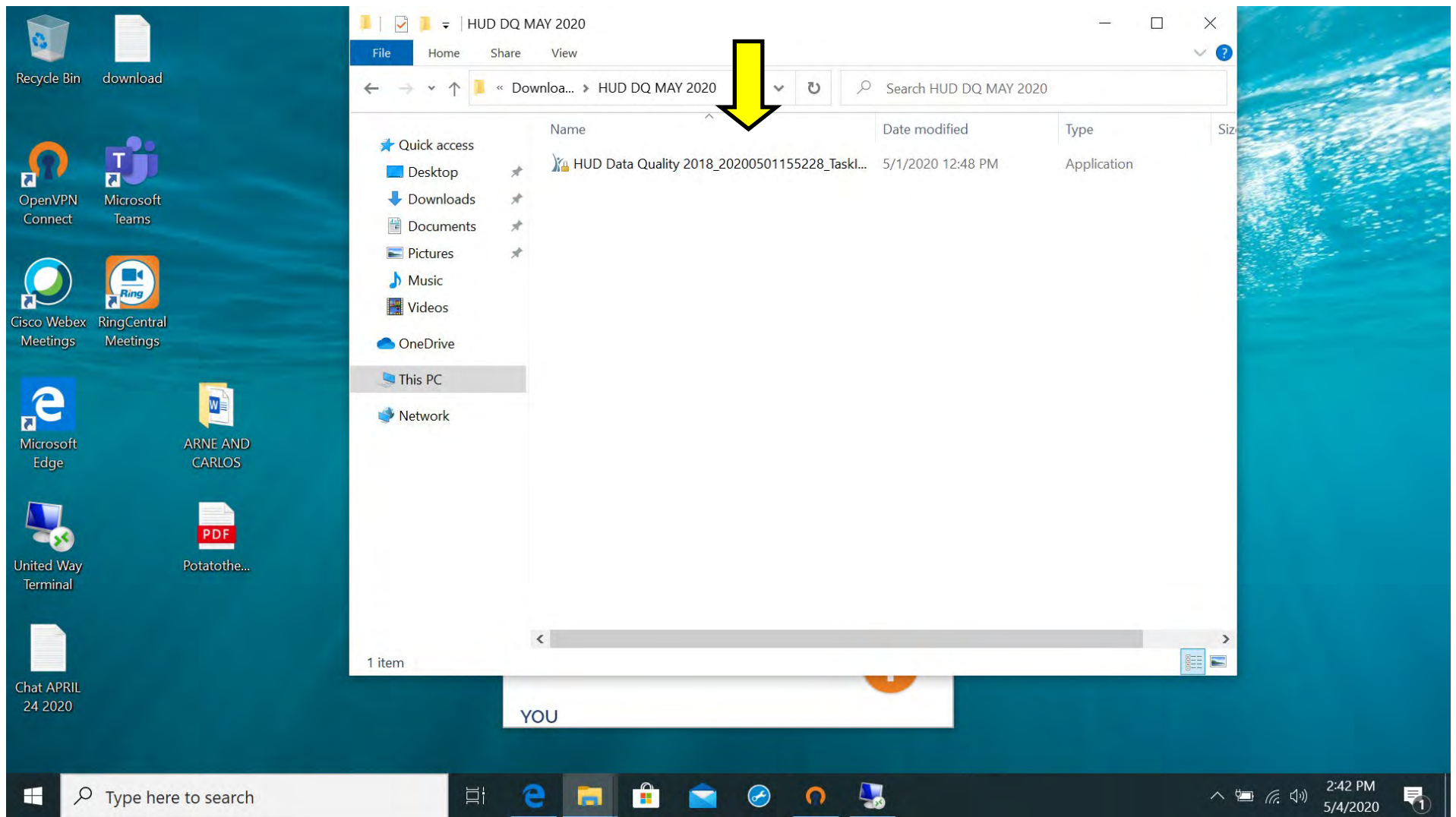
Go to the folder where you saved your report. Click the folder containing the report indicated by yellow arrow

(If your report auto downloaded, it will appear here in your downloads folder indicated by red arrow)



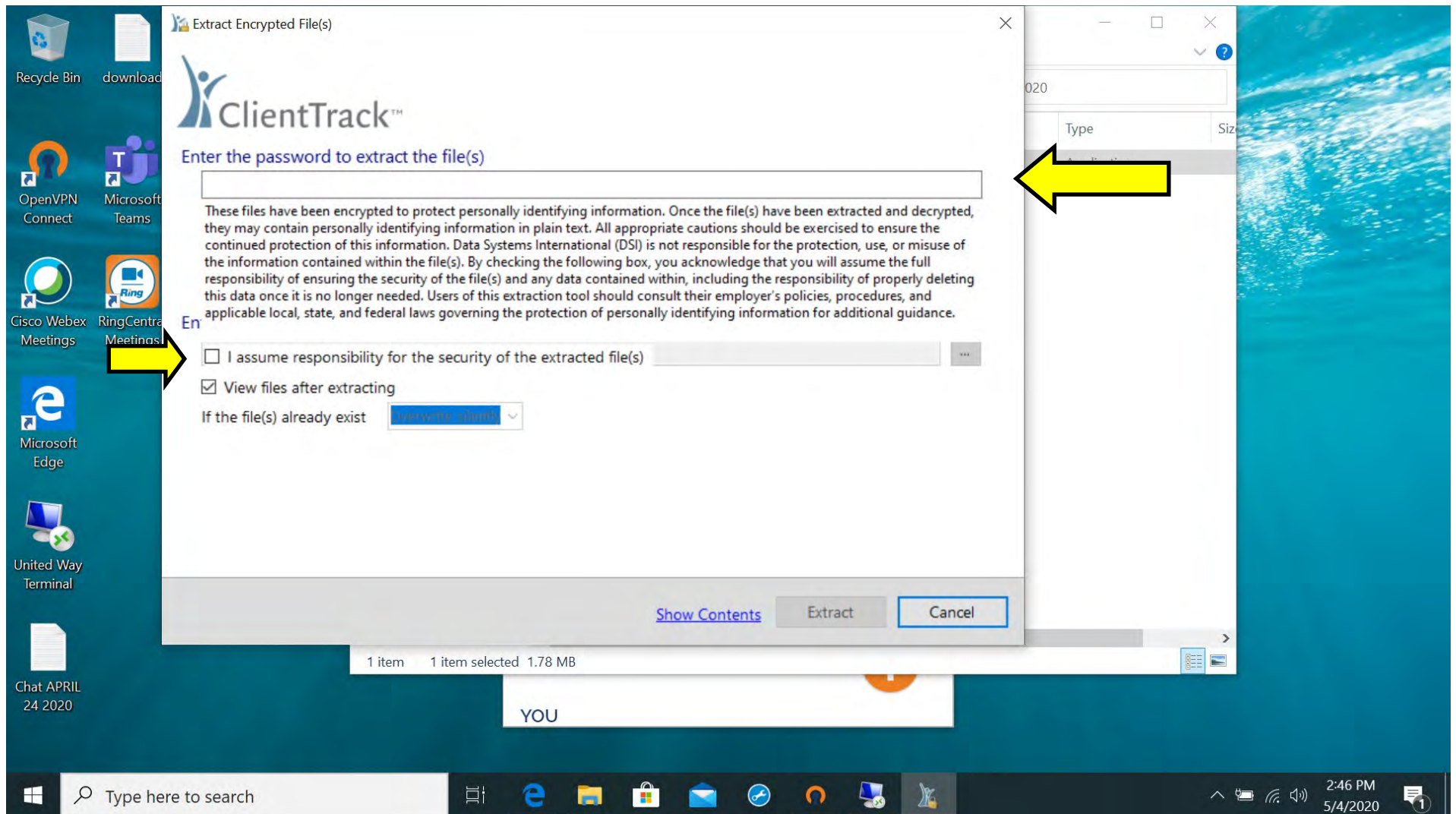
REPORT FOLDER

Once you have opened the folder, you will see all reports in that folder. Click the report you wish to open



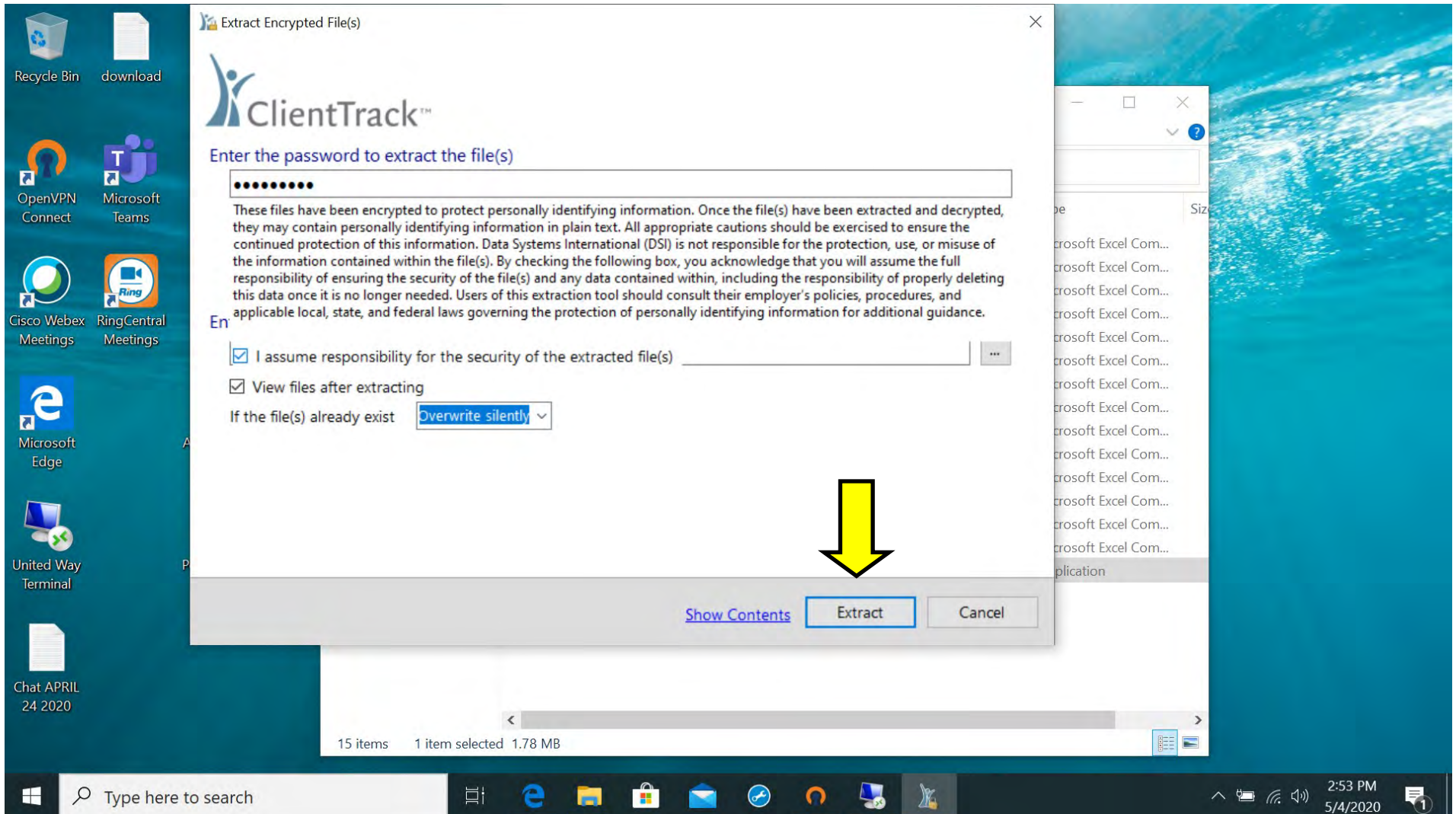
EXTRACTING THE DATA

Once you have clicked the report you want, you will receive this pop. You will need the password you set earlier in the process in order to gain access to the data. Enter your password and indicated below and check the box indicated below



EXTRACTING THE DATA

Once your password is entered and you have checked the box, click extract as indicated below.



EXTRACTED DATA

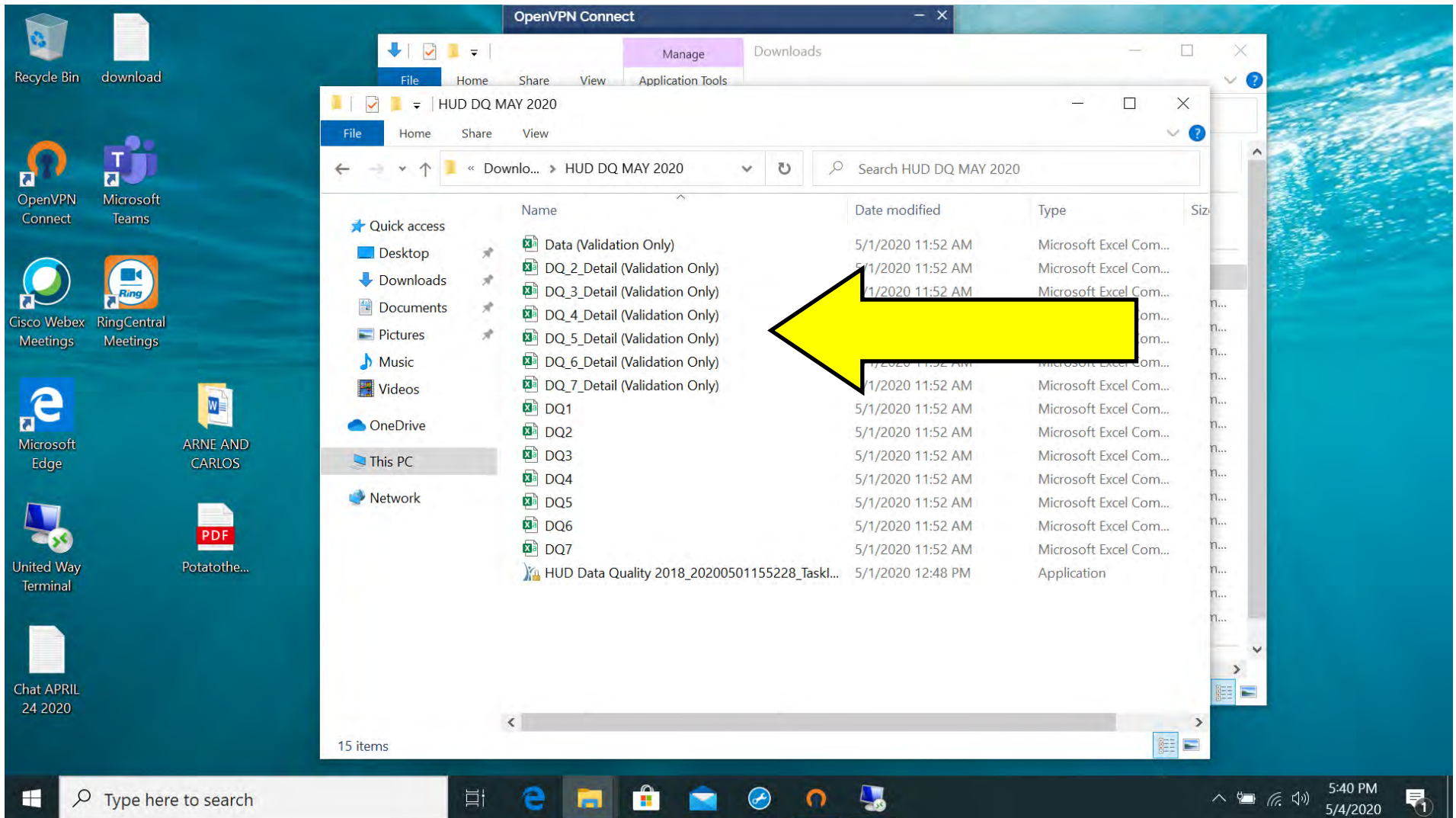
The data for your HUD DATA QUALITY DETAIL REPORT has been extracted and is now ready for your review.

The screenshot displays a Windows 10 desktop environment. In the background, an 'OpenVPN Connect' window is open, showing a 'Profiles' tab. The foreground features a 'File Explorer' window titled 'HUD DQ MAY 2020'. The left sidebar of the File Explorer shows 'Quick access' links to Desktop, Downloads, Documents, Pictures, Music, Videos, OneDrive, This PC, and Network. The main pane displays a list of files and folders. The files are organized into two groups: 'Data (Validation Only)' and 'DQ' files. The 'Data (Validation Only)' group includes files named 'DQ_2_Detail (Validation Only)', 'DQ_3_Detail (Validation Only)', 'DQ_4_Detail (Validation Only)', 'DQ_5_Detail (Validation Only)', 'DQ_6_Detail (Validation Only)', and 'DQ_7_Detail (Validation Only)'. The 'DQ' group includes files named 'DQ1', 'DQ2', 'DQ3', 'DQ4', 'DQ5', 'DQ6', and 'DQ7'. All these files are Microsoft Excel Comma-separated values files. At the bottom of the list is a file named 'HUD Data Quality 2018_20200501155228_Taskl...' which is an Application file. The desktop background is a blue abstract image. The taskbar at the bottom shows the Start button, a search bar, and several pinned application icons. The system tray on the right shows the time as 2:56 PM on 5/4/2020 and a notification icon.

Name	Date modified	Type
Data (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_2_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_3_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_4_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_5_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_6_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ_7_Detail (Validation Only)	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ1	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ2	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ3	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ4	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ5	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ6	5/1/2020 11:52 AM	Microsoft Excel Com...
DQ7	5/1/2020 11:52 AM	Microsoft Excel Com...
HUD Data Quality 2018_20200501155228_Taskl...	5/1/2020 12:48 PM	Application

DATA REVIEW

To review your data for errors click the files labeled DQ 2,3,4,5,6 or 7 Detail (Validation Only). Each one will need to be opened separately



REVIEWING DQ VALIDATION

DQ Validation shows you what the data issue is with each client. Once the issue is identified open that client record and makes corrections before moving on to the next client.

The screenshot displays the Microsoft Excel interface with the 'DQ_2_Detail (Validation Only)' workbook open. The ribbon is set to 'Home', and the 'Data' tab is active. The spreadsheet shows a table with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Data Element	clientid	Name	Client Doesn't Know/Refused	Missing	Data Issue	Data Issue Reason							
2	Social Security Number	414531	Brady, pat		Yes									
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														

The status bar at the bottom indicates the current sheet is 'DQ_2_Detail (Validation Only)' and the zoom level is 100%.