



CSV 4.0 – Export / Import / Upload

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Access to HMIS Export/Upload

- ❑ Access to the “HMIS Export” feature is available by request. Contact the Foothold Help Desk or your Client Services Representative.
- ❑ Let us know if you need access to just the HMIS Export feature or the One-Button Upload feature also. If you are uploading, let us know which database you are uploading into.

Using HMIS Export

- ❑ Purpose: HMIS Export sends you a copy of the CSV 4.0 fileset.
- ❑ Access is found under System Setup or Fiscal Menu.
- ❑ Note: The Export feature does not send data to any other database.
- ❑ The CSV fileset is needed by SSVF projects.
- ❑ Results come via the Messages Module.

Export Settings

- ❑ Export Start Date – **This date should almost always be 10/1/2014.** Putting an earlier date will result in validation errors.
- ❑ Export End Date – Defaults to today.
- ❑ Continuum of Care Filter – This should almost always be left blank unless you want to only include clients who have a certain Client Location.
- ❑ Export Types: Full, SSVF, or HIC – Should usually be left as “Full” to get all the files.

Export Results

- ❑ Export Results come via Messages.
- ❑ The Export Results message may have up to 3 attachments.
- ❑ Export_Results.zip is the zipped CSV fileset containing all of the data.
- ❑ Validation_Error.txt contains information about any data errors that should be addressed.
- ❑ Export_Error.txt contains any information about errors found in preparing the CSV fileset.

Opening The Files

- ❑ Export_Results.zip can be opened using any zip program.
- ❑ The file contains .csv files that can be opened in a spreadsheet application such as Excel or in a text editor.
- ❑ Validation_Error.txt and Export_Error.txt can be opened in any document editor such as Word or in Excel.

Troubleshooting Validation Errors

- ❑ Validation Errors will direct you to the appropriate file to look at and tell you which row has a problem.
- ❑ Most files reference a “PersonalID” which is actually the AWARDS ID. Use Client Lookup to search for the AWARDS ID, or look in the Client.csv file to find out which client is associated with which AWARDS ID.
- ❑ If you get a validation error, correct the data in your database and try exporting again.

Common Errors: Client Location

- ❑ Example 1: “Row #__ - CoCCode - Field's value is empty while it should not be”
- ❑ Example 2: “Client #_____ has an invalid Client Location (CoCCode) related to ProjectEntryID record #__ in Enrollment.csv file. No entry will be added to EnrollmentCoC.csv for this enrollment. CoCCode must be in the format XX-999”.
- ❑ These errors mean that the Client Location is wrong or missing. Client Location is found on the admission page and in H MIS Info. In multi-step programs you must re-process the admission.

Common Errors: Inventory.csv

- ❑ Errors relating to Inventory.csv are due to incorrect data on the Residence Unit page in System Setup.
- ❑ For example: “HouseholdType - Null values are not allowed for this field. This data will not be uploaded.”
- ❑ Make sure that the HMIS fields (Household Type through Client Location) have been turned on and the data has been updated.

Common Errors: Household Errors

- ❑ Errors relating to missing Household IDs mean that a client has not been joined to a Household.
- ❑ For example: “HouseholdID - Null values are not allowed for this field. This data will not be uploaded.
- ❑ RelationshipToHoH - Null values are not allowed for this field. This data will not be uploaded.”
- ❑ Visit the client’s Face Sheet and click on Household Composition to join them to a Household.

Common Errors: Missing Data

- ❑ If data is missing for a Universal Data Element it usually means the client's admission form wasn't updated after the release of the 2014 Data Standards.
- ❑ Sample Error: "Row 7 - NameDataQuality - Field's value is empty while it should not be."
- ❑ Open the client.csv file and view the Row number listed to find out which client needs to have their admission form updated.

Common Errors: Project/Site Errors

- ❑ Sample Error: “Geocode - Null values are not allowed for this field. This data will not be uploaded.”
- ❑ Errors related to Project.csv or Site.csv are related to the Agency Program Information page in System Setup. Update the field in question. If you’re uploading data to another database the Continuum of Care and GeoCodes used must exist in the destination database.
- ❑ Continuum of Care must be in the format XX-999.
- ❑ GeoCode must be in the format 999999.

Common Errors: Invalid Data

- ❑ Data must conform to specific CSV standards. If invalid data is found then you'll get an error.
- ❑ Sample Error: "Field's value '13' is not a valid 'LastGradeCompleted' value."
- ❑ The error will always tell you which file to look in, which field to look at, and which row # to investigate. From there it's up to you to use the PersonallD to figure out which client's record needs to be updated. Update their record in AWARDS and try the export again.

Common Errors: Information Date

- ❑ Information Date Errors tell you that data was recorded either before a client was admitted or after a client was discharged.
- ❑ Sample Error: “InformationDate - The InformationDate for this record does not fall within the client's Entry Date and Exit Date. This record will not be uploaded.”
- ❑ Generally speaking these errors can be ignored. This is a warning letting you know that the record will not be uploaded. However, you can look in AWARDS to find out why the record isn't included.

Common Errors: Services.csv

- ❑ Errors in the Services.csv file relate to the Contact Logs/Supportive Services Checklist. Only SSVF, PATH, RHY, and HOPWA services are exported.
- ❑ Sample Error: “FAAmount - Field's value is empty while it should not be.”
- ❑ This error means that a “Cost” was not entered for a Financial Assistance record.

Useful Tips

- ❑ Make sure “AWARDS ID” field is turned on under Client Lookup so that you can search for clients using the “PersonalID” field from the CSV files.
- ❑ Run an HIMS ReportBuilder that includes “Name Data Quality” to see if any records have not been updated to the new Data Standards.
- ❑ Run an HIMS History ReportBuilder that includes “Client Location” (at Admission and Update) and “Relationship to Primary Client” to see if any heads of household are missing Client Location.

About the Queue

- Exports, Imports and Uploads are added to a queue. Generally the queue moves pretty quickly and you should get Export Result messages within a few minutes.
- When uploading into a busy database the queue may take a few hours.
- If you've gone more than 24 hours without getting an "Export Results" or "Upload Results" message please contact the Help Desk.

One-Button Upload

- ❑ Access is granted by permission
- ❑ System Setup > HMIS Data Export > CoC Data Upload
- ❑ Projects must be set to “Submit to CoC” under Agency Program Info
- ❑ Avoid using Upload Start Dates before 10/1/2014.
- ❑ Validate your data first using HMIS Export.
- ❑ Check the Upload Results message carefully.

Special Upload Rules

- ❑ Projects must already exist in the destination database.
- ❑ Changes you make to Agency Program Information will NOT be reflected in the destination database.
- ❑ Clients you delete will not be deleted from the destination database.
- ❑ Discontinued Programs are not automatically discontinued.
- ❑ Stay in communication with the system administrator in the destination database.

Upload Results

- ❑ The queue for uploads will be slower than for exports.
- ❑ The Upload Results message will tell you if your upload was successful for all programs, some programs, or no programs.
- ❑ Upload Results is your proof of upload.
- ❑ Validation Errors and Export Errors tell you what data was not uploaded.

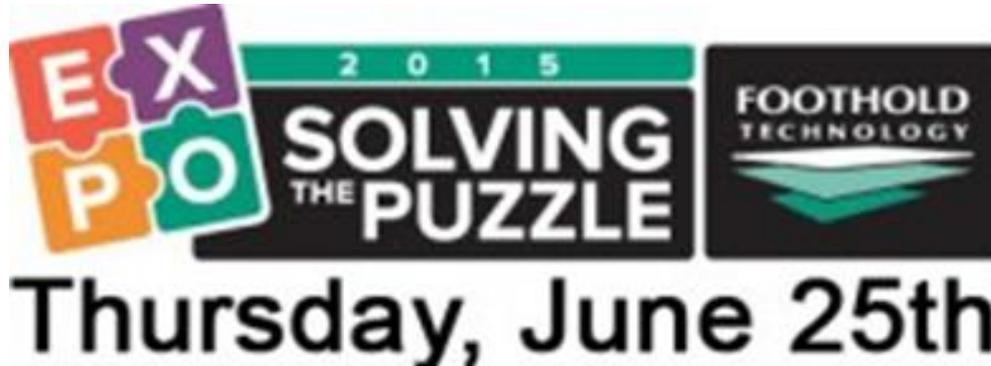
Upload Administrators

- ❑ Check the CSV Upload Report
- ❑ Verify client counts with uploading agencies after each upload.
- ❑ Compare and Share Data Quality Reports with the uploading agencies.
- ❑ Make sure uploading agencies are communicating with you before making changes to Agency Program Information, Discontinuing Programs, or Deleting Clients.

External Uploaders

- ❑ CSV Import functionality is currently restricted to special logins in the NYC Data Warehouse.
- ❑ System Admin must set up special accounts for import users.
- ❑ Only the FULL CSV 4.0 fileset is accepted. Must contain all 17 files, even if some of them are blank.
- ❑ Validation is done first before the import can proceed.
- ❑ Check the Import Results message carefully.

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