



HMIS Data – CSV & One Button Import

AWARDS INFORMATION SHEET

Foothold Technology provides CSV import and export functionality, which allows users to transmit data from HMIS projects.

To view the most recent CSV Format Documentation, please refer to the following document:
http://www.hudhdx.info/Resources/Vendors/4_0/HMISCSVSpecifications4_0FINAL.pdf

ABOUT THIS DOCUMENT

This document is intended to provide guidance for users completing data uploads from within AWARDS to an AWARDS HMIS and from non-AWARDS databases to an AWARDS HMIS database.

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FOR AWARDS USERS

Authorized users see a button on the System Setup module's menu page labeled "HMIS Data Export." (Once an agency designates an authorized user, the Foothold Senior Project Manager (SPM) can add that user to the list of authorized uploaders in AWARDS.)

After clicking the HMIS Data Export button, users will be taken to a page with two export options. A button labeled "Export" will allow a user to export a set of zipped CSV files for a selected program in order to upload, if necessary, to a non-AWARDS database. A button labeled "[HMIS Name] Data Upload" will allow a user to select one or more programs to export to the named HMIS.

EXPORT

If an agency using AWARDS must upload data to an HMIS that is not using AWARDS, they may use the Export feature to download a set of CSV files to upload into the HMIS. After clicking **Export** on the HMIS Data Export menu and selecting the project for export, Export Start Date, Export End Date, and CoC option, AWARDS generates an internal message to the user with a link to download the exported program data in a .zip file named "export_files.zip." This file can be saved to the user's local machine for upload in accordance with the destination HMIS's upload policies and procedures. Two error messages may also be attached to the message (if applicable).

Users can select an Export Type of "Full," "HIC" or "SSVF."

Information about the individual data elements included in each CSV file is available in the CSV Format Documentation referenced above.

[HMIS NAME] DATA UPLOAD

If an agency using AWARDS must upload data to an HMIS that is also using AWARDS, a simplified upload procedure is available. This "one-button upload" process begins when the user clicks the **[HMIS Name] Data Upload** button on the HMIS Data Export menu, at which time the following page is displayed:

Upload to NYC Continuum of Care

The projects below are set to "Submit to CoC" on the Agency Program Information settings page. Check the projects for which the HMIS CSV data should be exported to the NYC Continuum of Care Server.

Projects	Client Participation Records as of 10/01/14
<input checked="" type="checkbox"/> HMIS Transitional Housing CoC Program	9
<input checked="" type="checkbox"/> HMIS VA SSVF Homeless Prevention Program	3

[Check All](#) - [Clear All](#)

Enter a date to limit the export to a census of clients in the project(s) selected between the dates entered. Data for the census within these dates will be refreshed with what is included in the files uploaded.

Export Start date	10/01/2014
Export End date	04/05/2015

Select one or more Continuums of Care to limit the census to only clients enrolled in those Continuums based on the client's assigned Client Location. Do not select any option here if you wish to include all clients in the upload.

CoC:

- NY-999
- NY-600

Select Export Type

Full
 Full+

Pressing the Upload button will begin the upload process. The upload will be added to a queue and most uploads are completed within 24 hours. You will receive an Upload Results message when your upload has completed. Please review the Upload Results message to verify that the upload was successful and to check for any validation errors.

On this page the user is presented with a list of all projects identified under System Setup > Agency Program Information > Add/Edit Entire Program as submitting data to the [HMIS Name]. Users may select each program or all programs for export.

Users may also select an **Export Start Date** which will limit the records exported to those with a program history on or after the indicated date. The default start date is 10/01/2014. If editing the date in this field, do not enter a date prior to 10/01/2014 to ensure the data is consistent with the current HMIS Data Standards.

The **Export End Date** will limit the records exported to those with a program history on or before the indicated date. The default end date is today's date.

To include all clients in the upload, do not make any selections in the **CoC** multi-selection list. If any CoCs are selected, the import will only include clients enrolled in those continuums based on the client's assigned Client Location (collected at admission).

If set to display, users can select an **Export Type** of "Full" or "Full+." The Full+ option allows agencies to import and export additional service types beyond what is current found in the CSV 4.0 specifications. The Full+ file works exactly like the Full option, but includes one additional CSV file labeled "ServicesOther.csv." The list of service types included in the ServicesOther file are based on the old CSV 3.0 standards and are listed at the end of this document.

Clicking the **UPLOAD** button on this page collects data from the identified program and submits that data to the identified HMIS.

Once the export is complete, the user will receive a message in AWARDS indicating the status of the exported data. The message will contain a zip file attachment that contains the CSV files, a validation error file attachment (only if data errors exist), and an export error attachment (only if export errors exist). A **Messages** button appears on the confirmation screen shown after UPLOAD is clicked, which can be used to access the Messages module.

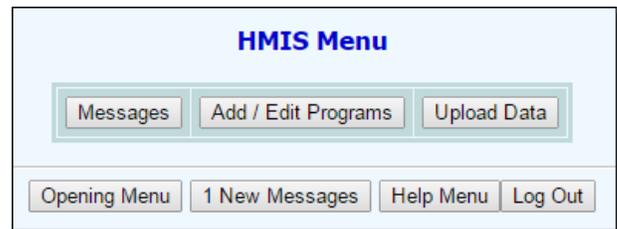
When viewing the contents of the files, we recommend view the CSV files in a spreadsheet application (like Excel) and viewing the TXT files in a document editor (like Word).

FOR NON-AWARDS USERS

Each AWARDS HMIS Database can be configured to accept any HMIS data assembled according to the earlier referenced CSV Format Documentation regardless of source.

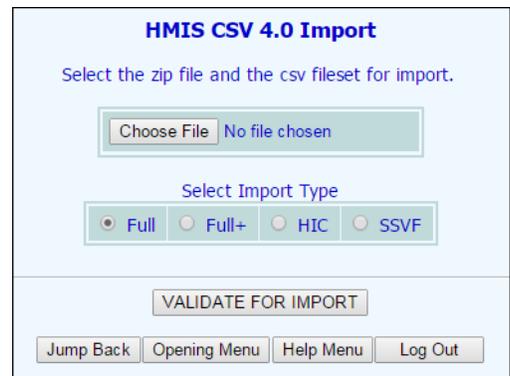
Once configured to accept CSV data, users logging into the HMIS to upload data will see a reduced *Opening Menu* page.

This menu has buttons for Messages, Add/Edit Programs, and Upload Data. Programs must be created in the HMIS through the Add/Edit Programs interface prior to uploading data.



Once the program has been added, data uploads can be initiated by clicking **Upload Data**. Doing so opens the *HMIS CSV 4.0 Import* page.

On this page there is a **Choose File** button that will allow the user to browse on their local machine for a pre-assembled .zip file, which must contain the full CSV file set.



If set to display, users can select an **Export Type** of "Full," "Full+," "HIC," or "SSVF." The Full+ option allows agencies to import and export additional service types beyond what is current found in the CSV 4.0 specifications. The Full+ file works exactly like the Full option, but includes one additional CSV file labeled "ServicesOther.csv." The list of service types included in the ServicesOther file are based on the old CSV 3.0 standards and are listed at the end of this document. The SSVF format requires only 9 of the 17 possible CSV files and is primarily used by CA-funded projects.

Once the user browses their local machine and identifies the .zip file for import, clicking **VALIDATE FOR IMPORT** uploads the file and evaluates the individual CSV files for format and content.

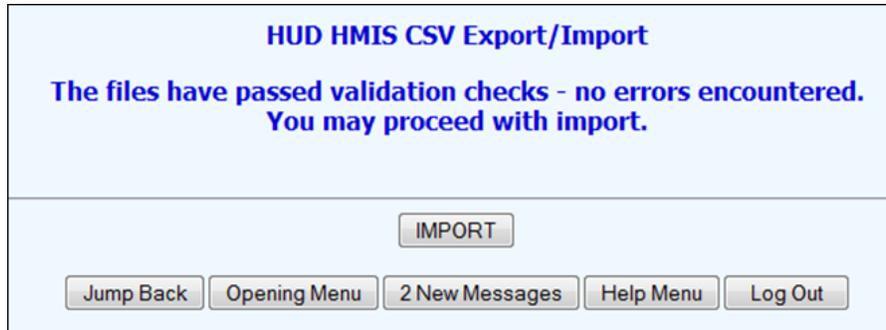
If there are errors found in the file, the user is notified of the errors; for example: →

Each file containing an error is highlighted with an expandable list of error details. If the errors are critical, the import is suspended and the user is directed to correct the errors and import the uploaded file set. Where there are missing files, incorrectly formatted files, or



unknown programs, the upload is aborted and the errors identified for correction. If there are errors within the files relating to individual clients, the upload continues but excludes the problematic records. The import error report will identify those excluded records.

If there are no errors found, users will see a message indicating that they may proceed with the import.



Clicking **IMPORT** completes the importing process. Users will receive a message within AWARDS when the import is complete.

Service Types included in ServicesOther.csv are:

Case Management	Other
Case/Care management	Other Health Care
Consumer Assistance and Protection	Other Service Type
Credit Repair	Outreach
Criminal Justice / Legal Services	Outreach and Engagement
Day Care	Personal Enrichment
Education	Referral to other service(s)
Employment	Referrals Out
Employment Services	Refused
Food	Rental Assistance
Health Care	Security Deposit Assistance
HIV/AIDS-Related Services	Security Deposits
Housing Placement	Substance Abuse Services
Housing Search and Placement	Temporary Housing and Other Financial Aid
Legal Services	Transitional Housing
Material Goods	Transportation
Mental Health Care/Counseling	Utility Assistance
Motel & Hotel Vouchers	Utility Deposits
Motel / Bed Night	Utility Payments
Moving Cost Assistance	