Quarterly HMIS Reports: Export and Submission

Jump to Submission

HUD Eva Report

1. Export HUD CSV from ClientTrack
2. Upload HUD CSV from ClientTrack to Eva
3. From Eva, download Organization-Level file
4. Data clean up
5. Repeat steps 1 - 4
6. Upload report to quarterly submission form

Inventory & Utilization Report

1. Select the appropriate **Utilization report**
2. Delete the Max Rows and input the date range
3. Select Export at the bottom of the pop-up window
4. Export as XLSX

HMIS Timeliness Data Entry Report

1. Select **HMIS Data Entry Timing Report**
2. Input the date range, type of enrollment, program(s) and any other filters that are needed
3. Select Report on the bottom right of the screen
4. Download the report to PDF via the Save Icon

Client Duplication Report

1. Select **Client Duplication Report**
2. Select at least one 'Exact' and choose the rest to be 'Like' and click 'Run'
3. Repeat these steps with different combinations of 'Exact' and 'Like'
4. Review proper client creation procedures with any users who are creating multiple duplicates
5. Submit a Spiceworks ticket with any duplicates that are found

HMIS End User Report

1. Switch **Workgroup to 'DQO'**
2. Select 'Users' on the left-hand menu
3. Select the appropriate Status (Active/Inactive)
4. Select Search
5. Move your cursor to the top right (to see more menu options)
6. Click Excel Export

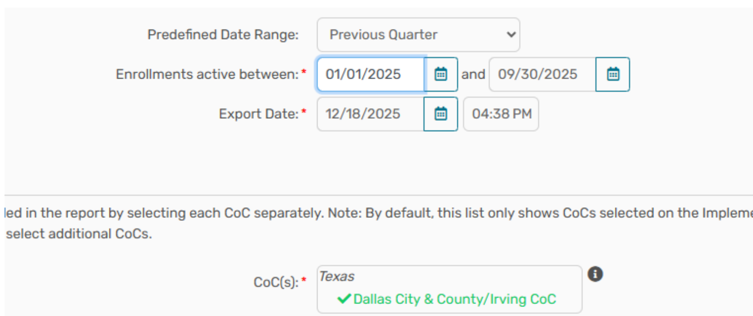
Annual Assessment Tool

1. Select **Annual Assessment Tool**
2. Leave 'Date' set to today's date
3. Select the checkbox for Overdue Annual Assessment

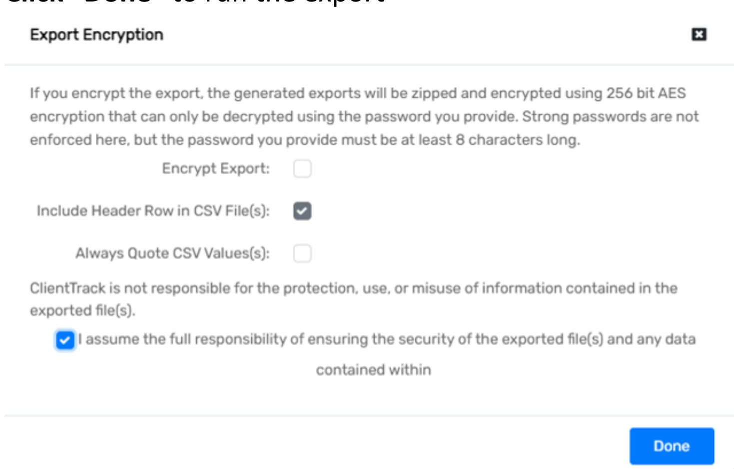
4. Select your Organization to view all annual assessments due
5. Click Search
6. Export the results to Excel
7. Complete all Annual Assessments for client(s) listed

HUD Eva Report

1. In ClientTrack's **Reporting workspace**, select **HMIS Exports** then **CSV Export 2026**
    a. Select **Eva** for Source End Point
    b. Select the **Previous Quarter** (First Quarter, Second Quarter, etc.) for the Predefined Date Range
        i. Make sure the **Start Date** is 01/01/202_
    c. Select **Dallas City & County/Irving CoC** from the CoC(s) list



    d. Select your **Organization and Project(s)**
        i. **Exclude** any projects that are **Other**
    e. Put a **check** next to **"Hash PII"**
        i. This is crucial for the upload to Eva to work
    f. **Click "Run Report"** and you'll receive a pop-up
        i. **Uncheck** "Encrypt Export" and **check** "I assume the full responsibility…"
        ii. **Click "Done"** to run the export



    g. **Download the export**, when it is finished, from the **'Files on Server'** page
2. Upload HUD CSV from ClientTrack to Eva

a. Go to: [Eva (abtsites.com)]
b. Click “Click here to get started”
c. Upload the downloaded CSV Export
    i. If you receive any error which keep you from uploading, please click “**Download Structure Analysis Detail**” and attach the downloaded file to a Spiceworks ticket.

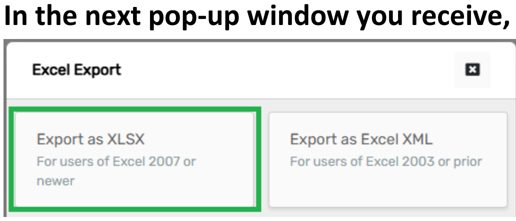
3. Download Organization-Level file from Eva
    a. Once the upload and processing are complete, click “**Data Quality**” and then “**Organization-level**”
        i. From here review the stats Eva provides.
    b. Click the download button at the top to get an Excel file of all the errors and warnings.
        i. Data cleanup will be completed using the download.
4. Data cleanup
    a. Guidelines when cleaning up your errors and warnings:

Eva Classifies Issues 3 Ways				
	What it means	Action Needed	Examples	Goal
High Priority Errors	Not permitted by the data standards AND have a **high** impact on federal reporting	Correct this issues with urgency	Duplicate Entries or No Head of Household	**Aim for zero**
General Errors	Not permitted by the data standards and have an impact on federal reports	Correct this issues with urgency	Missing Verteran Status	
Warnings	May be a data quality issue, but may also be an unexpected situation that reflects reality	Check for accuracy	Overlapping Enrollments or Unknown SSN	**DO NOT aim for zero**

    b. On the Submission Form, you will need to confirm all errors have been rectified and all warnings have been reviewed.
        i. If corrections were not made provide a reason as to why.
5. Repeat steps until you are ready to submit.
6. Upload report to quarterly [Submission Form]

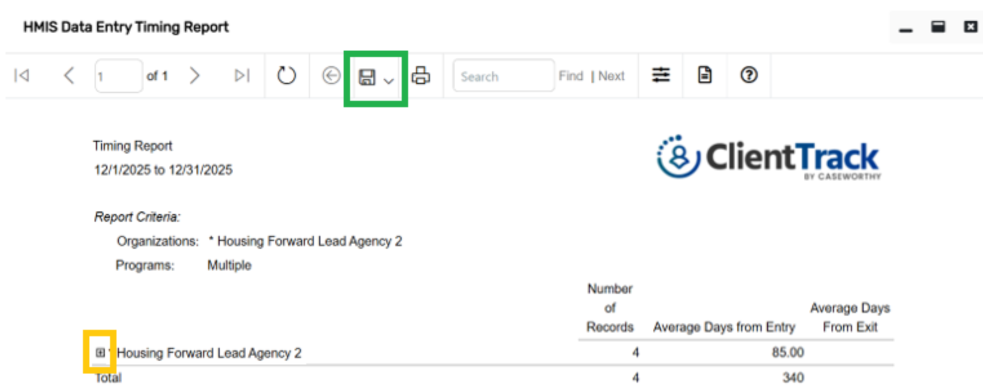
Inventory and Utilization Report

1. In ClientTrack’s Reporting workspace, open the “Other” folder.
2. Select the appropriate Utilization Report (e.g., Utilization (E/E, SH, TH) or Utilization (Housing Programs)).
3. **Delete the Max Rows and enter the date range, making sure to include the “/”.**
4. **Select Export** at the bottom of the pop-up window
5. **In the next pop-up window you receive, select Export as XLSX**



Timeliness Report

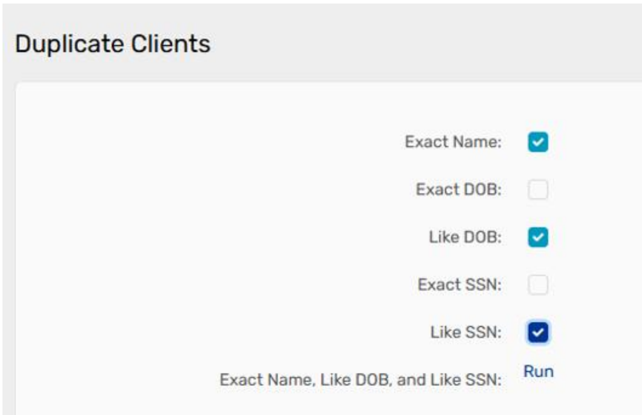
1. In ClientTrack's **Reporting workspace**, select **HMIS Reports** then **HMIS Data Entry Timing Report**
2. Input the date range, type of enrollment, program(s) and any other filters that are needed
    a. Date Range: For the "Predefined Date Range" select **the previous quarter** (First Quarter, Second Quarter, etc.)
    b. Type: **Begin Enrollment**
    c. Organization: **Your organization**
    d. Filter by Program:
        i. Check the box
        ii. **Select all programs except "**Other**"**
    e. Filter by Grants: **Ignore this**
    f. Use Approximated Exit Date: **Ignore this**
    g. Hide Criteria: **Ignore this**
3. Select Report on the bottom right of the screen
    a. This will open a pop-up window with the report



    b. Click the + button next to your Organization's Name (yellow box above).
        i. This will expand the report to show the Program's Name and the overall timeliness for that program.
        ii. If you have a higher average for a program than expected, click the + button next to a Program Name.
            1. Review each client (enrolled during reporting period) and their individual timeliness.
    c. **Before Step 4, you must click the – button to hide the client list before moving on. You must protect client level data.**
4. Download the report to PDF via the Save Icon
    a. **Please verify there is no client level data** and select the Save icon (marked by green box above) and click "PDF"
5. Upload report to quarterly Submission Form

Client Duplication Report

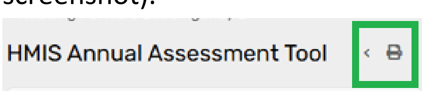
1. In the Reporting workspace, in the folder labeled "**Other**", select **Client Duplication report.**
2. Select 'Exact' for one identifier and 'Like' for the other two, then click 'Run'



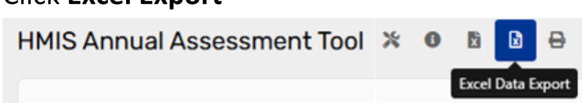
3. Submit a **Spiceworks ticket** with any duplicates that are found
4. Repeat these steps with different combinations of 'Exact' and 'Like'
5. Review proper client creation procedures with any users who are creating multiple duplicates

Annual Assessment Tool

1. In the Home workspace, in the folder labeled **"My ClientTrack",** select **Annual Assessment Tool.**
2. Keep 'Annual Assessment Date' set to **Today's Date.**
3. Select **'Overdue Annual Assessments'** for one identifier and 'Organization' or 'Project', then select **Search**
    a. At least **one filter must be applied** in order to search.
    b. Please pay close attention to the **Anniversary Date** in the search results.
        i. The tool identifies clients who have a current year annual assessment but are missing an annual assessment from a previous year.
4. Move your cursor to the **top-right corner to view additional menu options** (as shown in the screenshot).



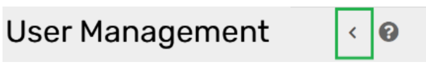
5. Click **Excel Export**



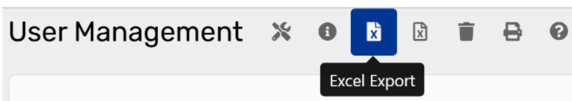
    a. An extended menu will appear, select Excel Export.
    b. You'll receive a download with a list of Annual Assessments that need to be completed.
6. Review the exported list to see which clients have an Annual Assessment due.
7. Complete the Annual Assessments for the clients listed to bring all records up to date.

User Report

1. **Switch Workgroup to "DQO"**
    a. Click your initials in the top-right corner.
    b. Select Workgroup, then choose DQO.
    c. Click Apply.
        i. The page will reload with updated options.
2. Select **"Users"** from the left-hand menu to view current users in your organization.
3. Keep Status set to **"Active."**
    a. If you change the Status, click Search.
4. Move your cursor to the **top-right corner to view additional menu options** (as shown in the screenshot).



5. Click **Excel Export**



    a. An extended menu will appear, select Excel Export.
    b. You'll receive a download with a list of all Active users.
6. **Evaluate this list to ensure that everyone listed is a current employee.**
    a. If anyone on the list needs to be made Inactive, please send a Spiceworks ticket with all names that need to be Inactive.

Submission Form

1. Select your Organization
    a. If it is not listed, select "Not Listed".
    b. Type your organization's name in the box provided.
2. [Final System-Level Data Quality Download from Eva]
    a. Upload the download received from Eva after you've uploaded the final CSV Export.
        i. If you do not receive a download, take a screenshot and upload it in place of the CSV Export.
    b. You'll get the download from the System-Level option in Data Quality dropdown.
3. Have all High Priority Errors been resolved?
    a. These errors are expected to be resolvable.
    b. If "No", explain why the errors cannot be resolved.
4. Have all General Errors been resolved?
    a. These errors are expected to be resolvable.
    b. If "No", explain why the errors cannot be resolved.
5. Have all Warnings been resolved?

   a. These errors **may not** be resolvable.
   b. If “No”, explain why the errors cannot be resolved.
6. Utilization Report
   a. Upload the report you generated in ClientTrack.
   b. Do all residential projects meet the CoC’s utilization benchmarks?
      i. If “No”, please explain why rates fall below benchmarks.
      ii. Select “N/A” if this does not apply to any of your projects.
7. Timeliness Report
   a. Upload the PDF version of the Timeliness Report.
   b. Make sure there is **NO client level information.**
   c. Verify all programs are visible in this report.
   d. Do all project(s) meet the CoC timeliness benchmarks?
      i. Review and indicate whether your project(s) meets the benchmarks.
      ii. If “No,” please explain why.
         1. Example: “We were understaffed, so data entry was delayed, which caused us to miss the benchmark.”
8. Please confirm a User Report was run and that all active users still need HMIS access to perform their responsibilities.
   a. Submit a Spiceworks ticket for any active users who should be made inactive.
9. Please confirm a Client Duplication Report was run and that any duplicate client records have been reported via a help desk ticket.
   a. Respond based on the results of the report you ran.
10. Please confirm all Housing Move-In Dates are recorded for every client who has moved into permanent housing.
    a. Housing Move-In Dates are required for all clients who have moved into permanent housing.
11. Please confirm the Annual Assessment Tool was used to verify all required Annual Assessments are complete.
    a. For any assessments that were not completed, provide an explanation.
12. Please review all active projects and confirm whether any are no longer serving clients and should be disabled.
    a. If a project is no longer serving clients, submit a Spiceworks ticket.
       i. Make sure all clients are exited before submitting ticket
13. Email of Data Quality Officer
    a. This must be the Data Quality Officer
14. Data Quality Officer Signature
    a. Simply sign it as best you can with your mouse or finger (depending on your device)