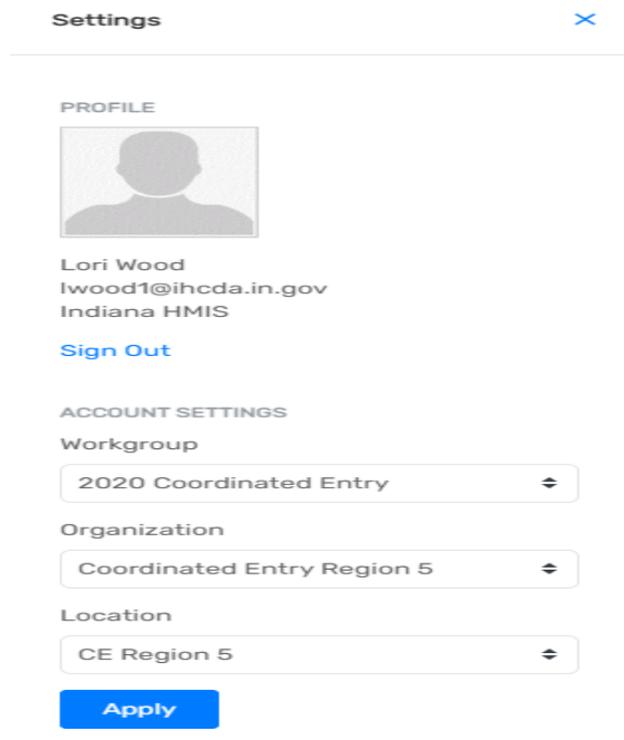
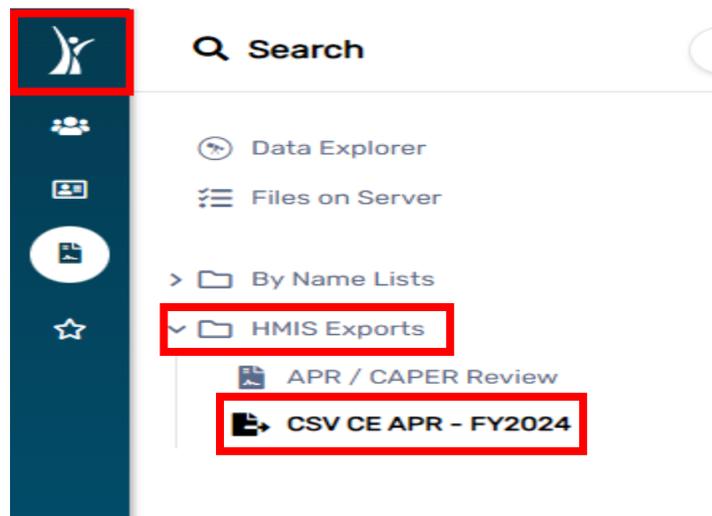


Login to HMIS using the 2020 Coordinated Entry Workgroup and your Coordinated Entry Region # for the Organization.



From the **“Reports”** workspace, select **“HMIS Exports”** in the left menu then select **“CSV CE APR – FY2024.”**



Complete the **“Date Range”** section with the **“Begin Date”** and **“to”** date.

HOW TO GUIDE – COORDINATED ENTRY APR

CSV CE-APR – FY2024 v1.0

This tool has been programmed based on the specifications for the version listed on the title as published by HUD. Current and historical specifications can be found on the HUD Exchange *CE APR* HHS Programming Specifications page linked [here](#).

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 his report. Only records that fall within the date range you select will be included.

Date Range List: -- SELECT --

Begin Date: 12/01/2022 to 11/30/2023

Complete the “Continuum of Care” section. Select the “CoC” from the drop-down “Indiana Balance of State”.

Continuum of Care

Limit CoC: CoC Only From Implementation Information

CoC: -- SELECT --
-- SELECT --
Indiana
Indiana Balance of State

Organization

Complete the “Organization” section. **Double click the 2 checkmarks to the right of the Organization list. This will de-select all organizations.**

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 organ created by the Organizations selected here will be included in the export.*

Organization: *
 A Better Way
 Advantage Housing Inc
 Affordable Housing Corporation
 AIDS Ministries
 AIDS Resource Group Evansville



HOW TO GUIDE – COORDINATED ENTRY APR

Next, select (click on) your **“Coordinated Entry Region#”** in the list of organizations appearing in the **“Organization”** box. After you select your organization, you should see a green checkmark to the left of your CE Region# organization name. Coordinated Entry Region 5 is used in the example below.

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 created by the Organizations selected here will be included in the export.*

Organization: *
Coordinated Entry Region 2a
Coordinated Entry Region 3
Coordinated Entry Region 4
 Coordinated Entry Region 5
Coordinated Entry Region 6

The “Official” section is NEW. De-select the **“Official Export”** by clicking on the checkbox.

Official

If generating a CE APR for an official HUD submission, users should select Official Submission. Checking this will run a CE APR based on the Organization and/or Project selected rather than a full system-wide report.

Official Export:

After you **“de-select”** the **“Official Export”** you will see the **“Project Type”** and **“Project”** fields as displayed below. Select the **“Filter by Project Type”** option then select **“Coordinated Entry”** from the list of project types. **(The Coordinated Entry option is at the bottom of the drop-down list of project types, so please be sure to scroll to the bottom)** Next, select your **Coordinated Entry Region #** in the **“Project”** list.

Official

If generating a CE APR for an official HUD submission, users should select Official Submission. Checking this will use the client universe from the CE APR to look system wide. Not Checking the Official Submission will allow users to run a CE APR based on the Organization and/or Project selected rather than a full system-wide report.

Official Export:

Project Type: Filter by Project Type
PH – Housing with Services (no disability required for entry)
Day Shelter
Homelessness Prevention
 Coordinated Entry

Project(s): Filter by Project(s)
 Coordinated Entry (R5)
Coordinated Entry (R6)
Coordinated Entry (R7)
Coordinated Entry (R8)

Validation File

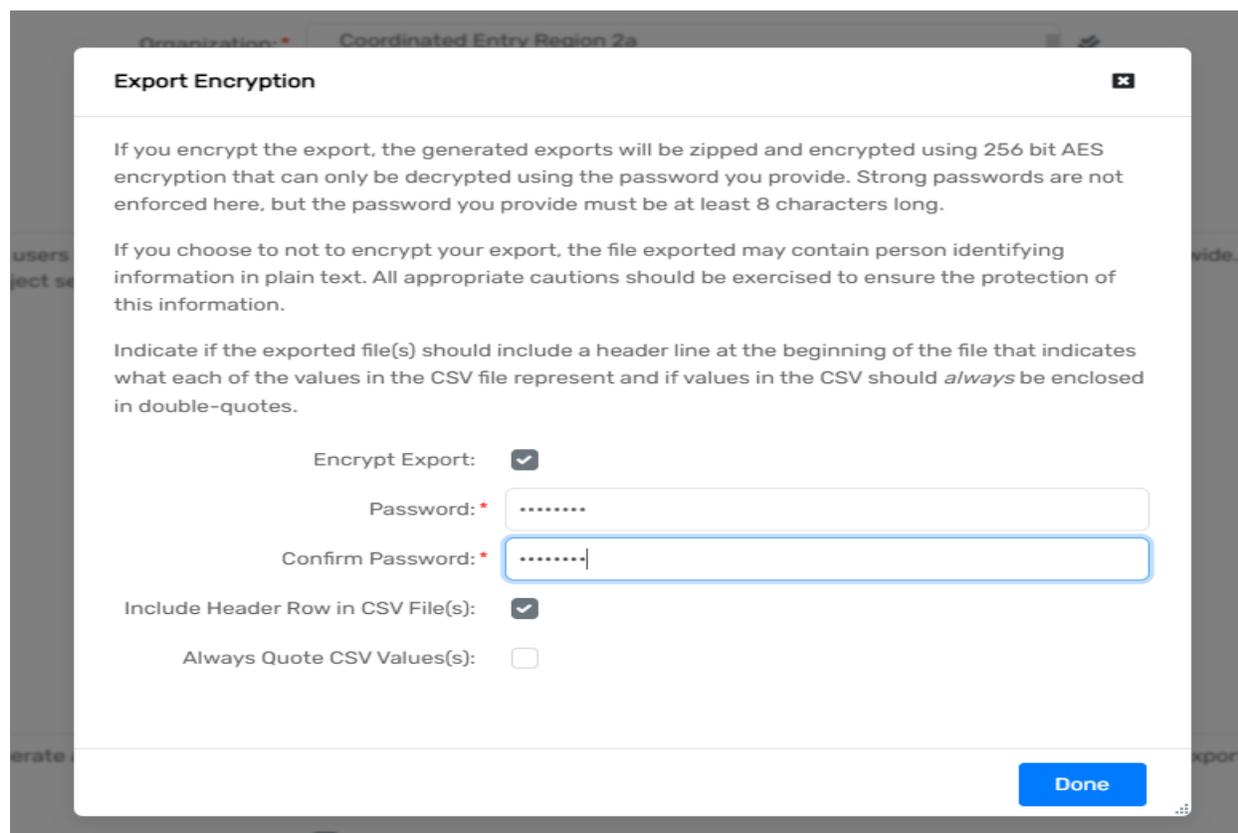
Clicking this button will generate a report to be used for validation. It will also generate a report to be used for the final report. This will not affect the number of entries. The final report will be selected to get details of entries in the report.

Select **“Run Export”** in the bottom right corner of the screen.

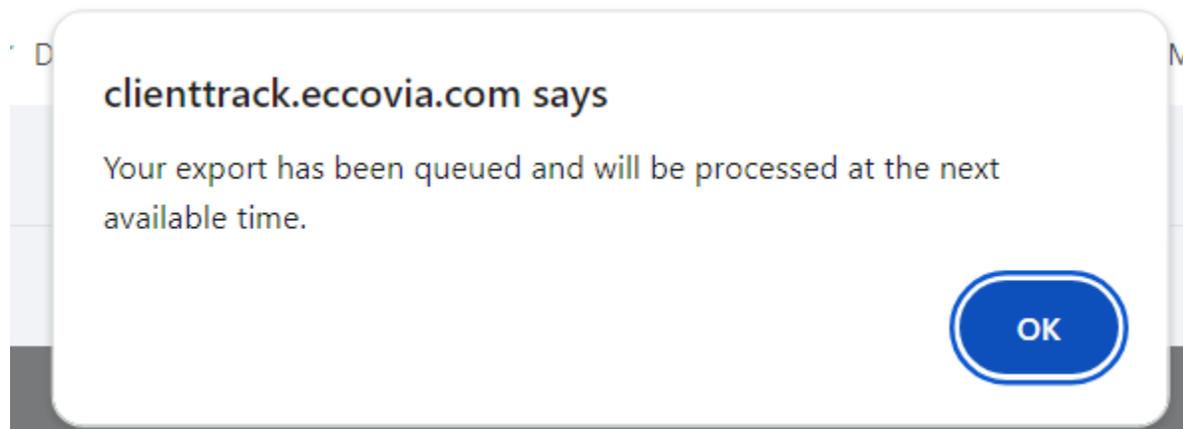
ng of or delay the main export. **THIS MUST** be selected to get details of numbers in



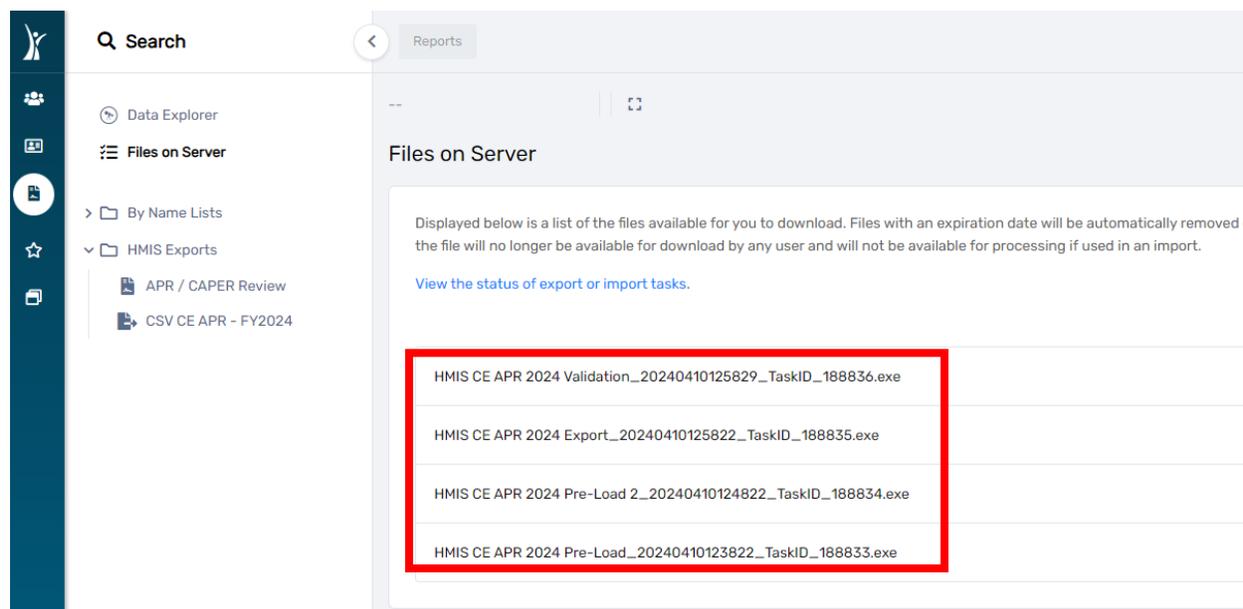
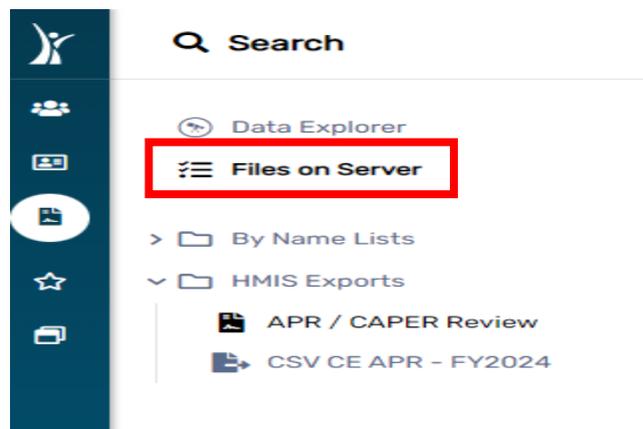
Enter a password in the “**Password**” field and re-enter the password in the “**Confirm Password**” field. **You will be required to enter this password again later in this process, so please be sure to write it down or select a password you will remember so you can export, download, and zip the report later.**



A message will display **“Your export has been queued and will be processed at the next available time.”**



Select “Files on Server” in the left menu to monitor when your report is ready. **When the CE APR is finished running, you will see 4 separate files displayed.**



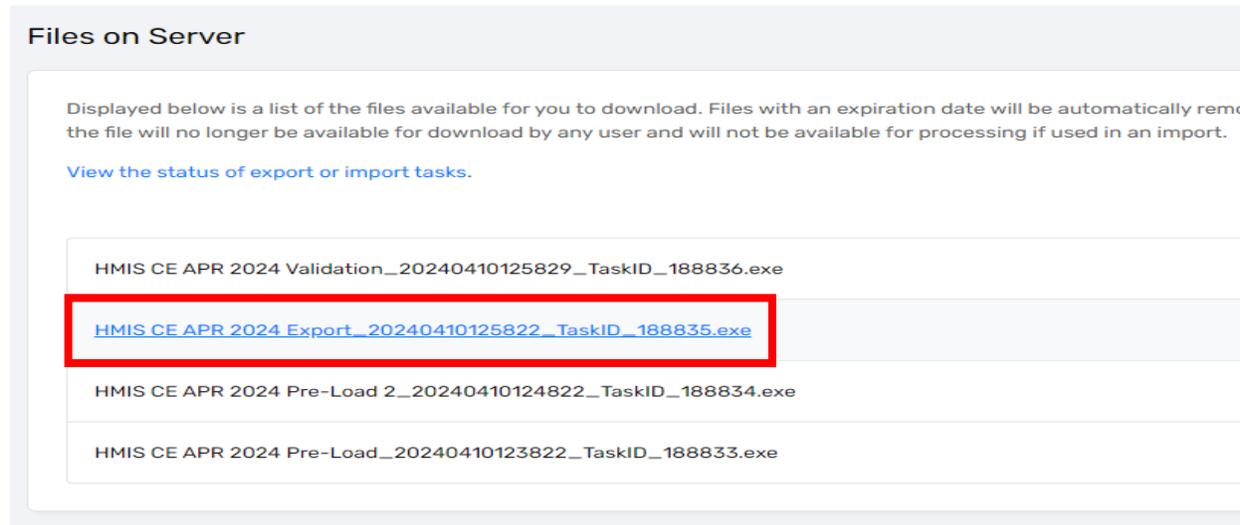
The 4 files in the completed CE APR are:

- 1. Validation
- 2. Export
- 3. Pre-Load 2
- 4. Pre-Load

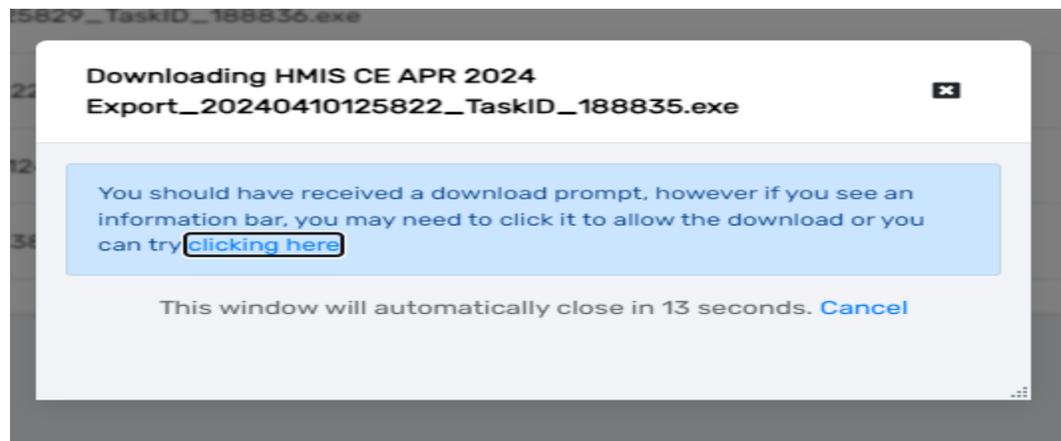
NOTE: At this point, please refer to the separate How to Guide for the APR/CAPER Review Tool which allows you to review your Data Quality, drill down to the client level data, and correct data quality errors. The APR/CAPER Review Tool can be found on the IN BoS CoC’s HMIS and DV ClientTrack webpage: <https://www.in.gov/ihcda/indiana-balance-of-state-continuum-of-care/hmis-clienttrack-and-dv-clienttrack/>

To download, export, and compress (zip) your report:

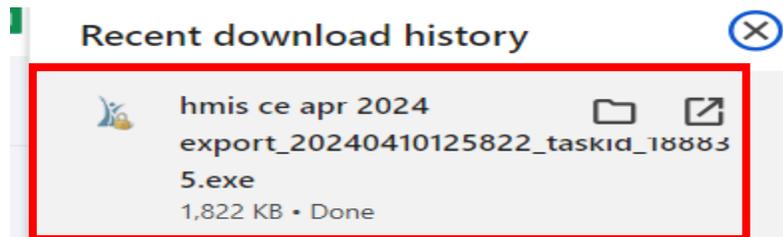
Select **ONLY** the “Export” file to begin the downloading process for your CE APR. *If you select the Validation file or one of the Pre-Load files you will receive errors when you attempt to upload your report to SAGE.*



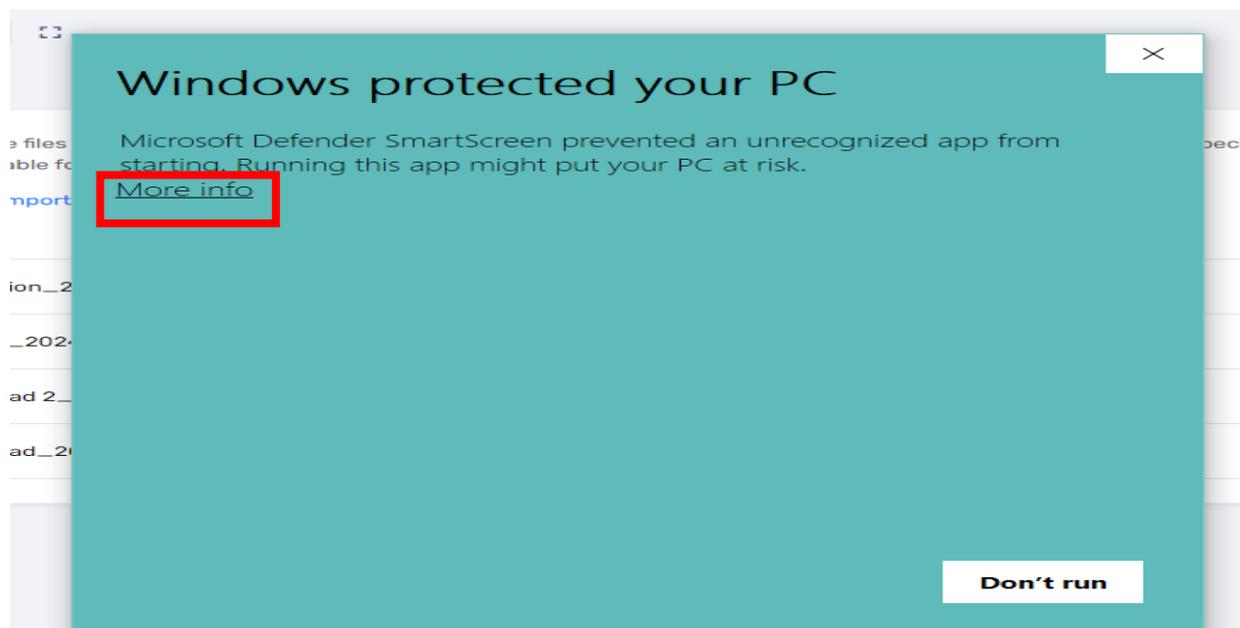
A message will display as seen below:



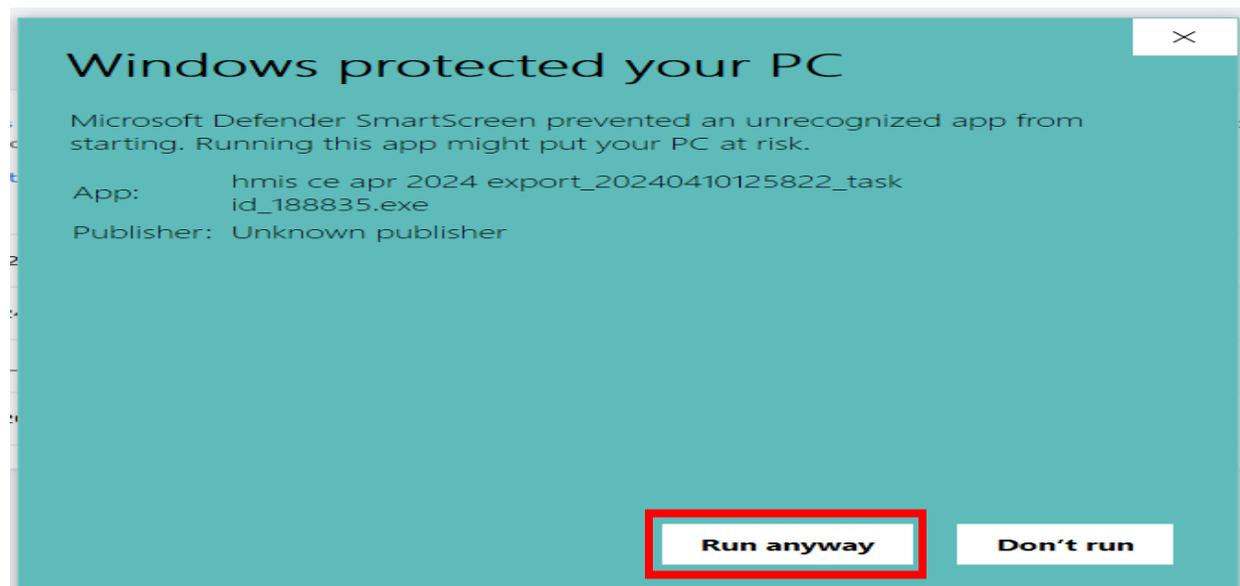
Click on the download prompt on your computer. This may appear in the upper right corner or lower left corner of your screen.



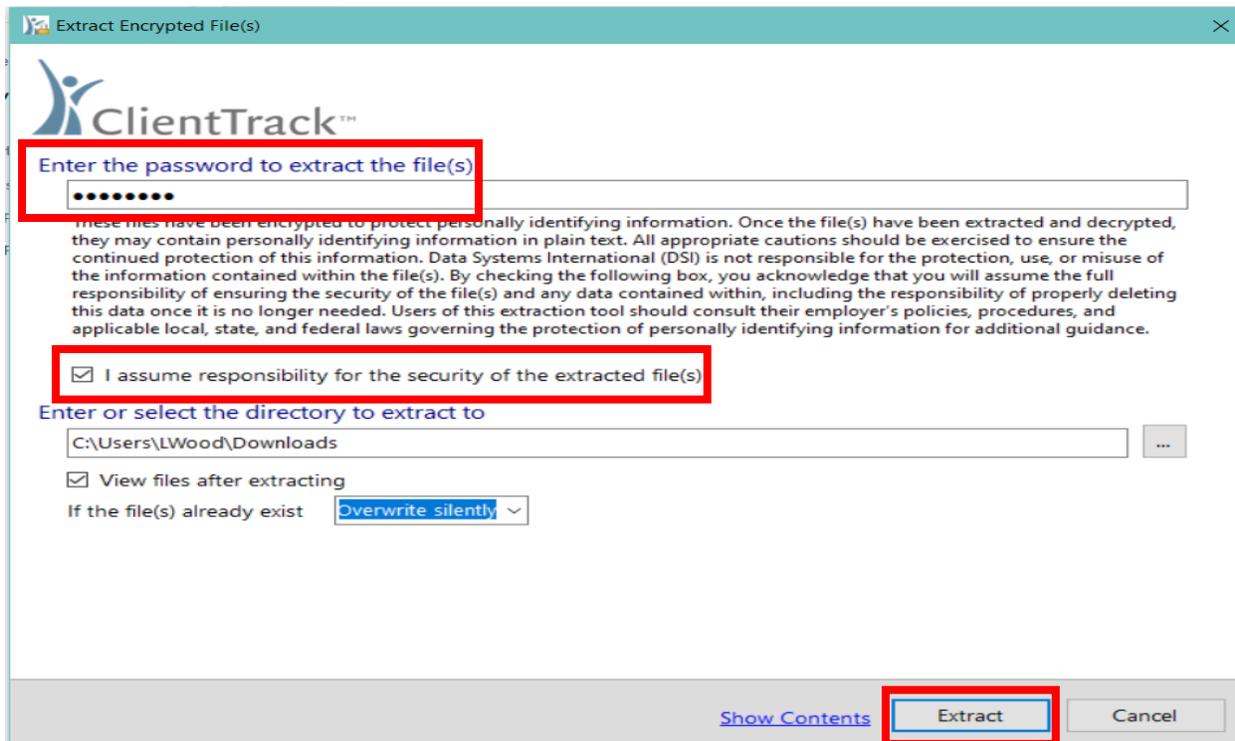
You may see a message like the one displayed below. If so, select **“More Info.”**



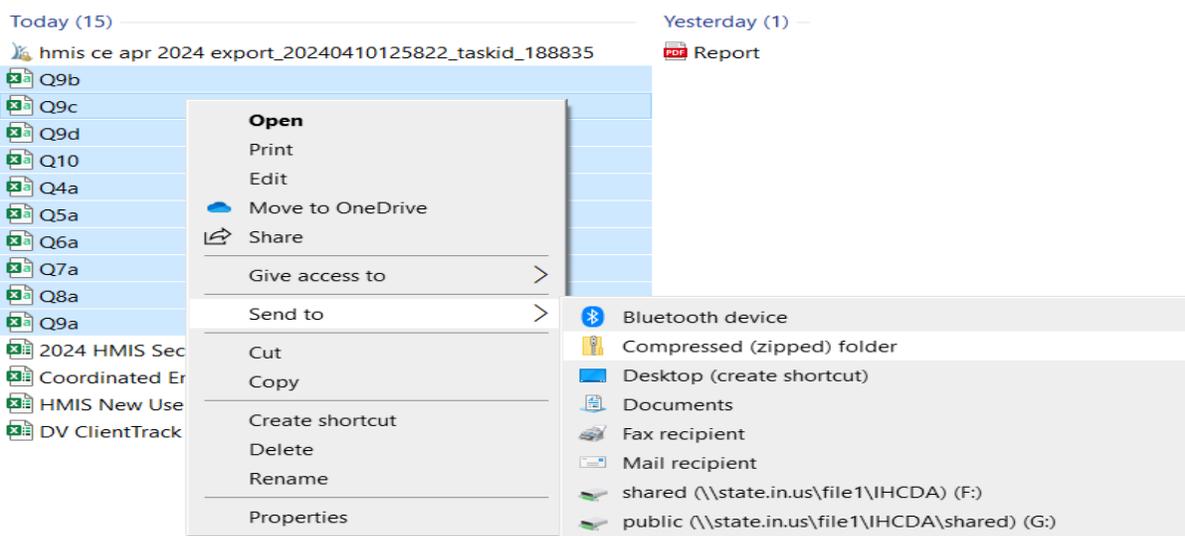
Then select **“Run Anyway”**.



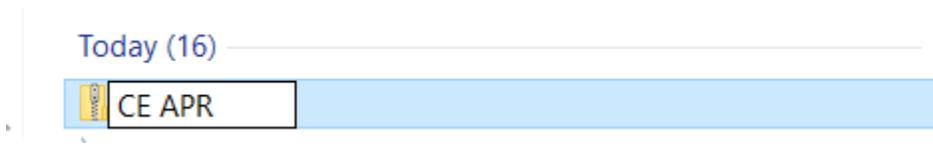
Type in the password you entered earlier when setting up the report. Click (select) the “I assume responsibility for the security of the extracted file(s)” checkbox. Then select “Extract” in the bottom right corner of the screen.



Highlight the Q files as seen in the below screenshot. (click on the first file, hold down the shift key and use the arrow down key to highlight all files together) Next right click in the blue area, select “Send to” then select “Compressed (zipped) folder”.



The zipped file will then appear on your desktop. You can rename the file as seen below.



The zipped file is now ready to be uploaded to SAGE.

Please email the HMISHelpDesk@ihcda.IN.gov if you need additional assistance.