



HMIS Data - CSV & One Button Import Information

July 2010

In June 2010, HUD released version 3.02 of the CSV Format Documentation* based on the March 2010 HMIS Data and Technical Standards. Foothold Technology has updated its CSV import and export functionality to work according to the new standard with some small and likely temporary modifications so that the exchange of data can begin. This document will provide guidance for users completing data uploads from within AWARDS to an AWARDS HMIS and from non-AWARDS databases to an AWARDS HMIS database.

For AWARDS Users

Authorized users† will see a button on the System Setup Menu labeled “HMIS Data Export”. After clicking this 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 pressing Export on the HMIS Data Export menu and selecting the program for export, AWARDS will generate 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.

The CSV tables included in the ‘export_files’ zip file are:

Agency_Program.csv	Client_Historical.csv	Client.csv
Export.csv	Income_Benefits.csv	Program_Participation.csv
Service_Event.csv		

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.

* [http://hmis.info/Resources/7527/HMIS-Comma-Separated-Value-\(CSV\)-Format-V.-3.0-\(Based-on-March-2010-Data-Standards\).aspx](http://hmis.info/Resources/7527/HMIS-Comma-Separated-Value-(CSV)-Format-V.-3.0-(Based-on-March-2010-Data-Standards).aspx)

† 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.

Export to NYC Continuum of Care

The programs below are set to "Submit to CoC" on their Agency Program Information settings page.
Check the programs for which the hud csv data should be exported to the NYC Continuum of Care Report Server.

Programs	Program Participation Records as of 10/01/07
<input checked="" type="checkbox"/> PMR CSV Test Program	1

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

Export Start date

Remove ALL data from the program in the target database before uploading the data in the files.

After running an export with a start date set and this option checked, the program in the target database will contain only the data for those in the census as of the date entered.
With this option unchecked, the data in the target database for those only on the program roster prior to the date entered will remain untouched.

The user will be presented with a list of all programs identified under Agency Program Information as submitting data to the [HMIS Name]. The user may select each program or all programs for export. The user 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. Additionally, users are presented with an option to remove all data from the program in the target database before uploading the current data. If data had been previously uploaded, this will empty the census in the target database before uploading the newer records.

Clicking the "Export" button will collect data from the identified program and submit that data to the identified HMIS.

HUD HMIS CSV Export/Import

Export to NYC Continuum of Care is in progress.
You will receive further status notification messages in your AWARDS Inbox.

Once the export is complete, the user will receive a message in AWARDS indicating status of the exported data.

The data collected and transmitted to the AWARDS HMIS Database follows the format prescribed for the following CSV files:

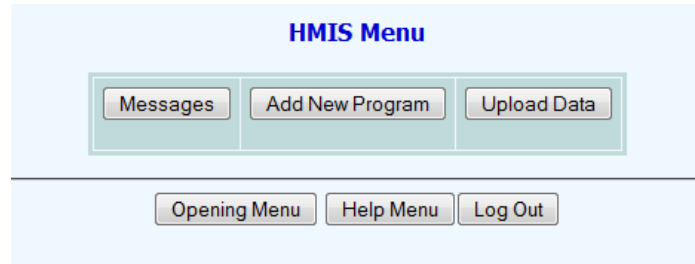
- | | | |
|-------------------|-----------------------|--------------------------|
| AgencyProgram.csv | Client Historical.csv | Client.csv |
| Export.csv | Income_Benefits.csv | ProgramParticipation.csv |
| ServiceEvent.csv | | |

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

For Non-AWARDS Users

Each AWARDS HMIS Database can be configured to accept any HMIS data assembled according to the above 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.



This Menu will have a Messages, Add New Program and Upload Data button. Programs must be created in the HMIS through the Add New Program interface prior to uploading data. Once the program has been added, data uploads can be initiated by clicking the Upload Data button.



On the HUD HMIS CSV Export/Import Menu, there is a Browse button that will allow the user to browse their local machine for a pre-assembled zip file with, at a minimum, the following CSV files:

- | | | |
|-------------------|-----------------------|--------------------------|
| AgencyProgram.csv | Client Historical.csv | Client.csv |
| Export.csv | Income_Benefits.csv | ProgramParticipation.csv |
| ServiceEvent.csv | | |

(The file names can be altered from the listed names so long as the Export.csv file list all of the correctly named files as contained in the zip file. The zip file can be named anything.)

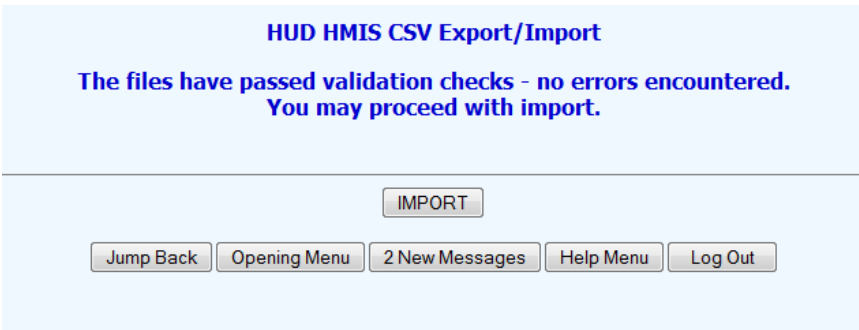
Note: On this initial deployment of CSV Import/Export functionality, only the above listed files will be validated and imported. If a complete set of CSV files (as identified in the CSV Format Documentation) is included in the zip file, they will be disregarded without negatively impacting the validation process.

Once the user browses their local machine and identifies the zip file for import, clicking Validate for Import will upload the file and evaluate the individual CSV files for format and content. If there are errors found in the file, the user will be notified of the errors.



Each file containing an error will be highlighted with an expandable list of error details. If the errors are critical, the import will be suspended and the user will be directed to correct the errors and import the uploaded file set. Where there are missing files, incorrectly formatted files or unknown programs, the upload will be aborted and the errors identified for correction. If there are errors within the files relating to individual clients, the upload will continue but will exclude the problematic records. The import error report will identify the 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.

File Value Guidance:

AgencyProgram.csv

OrganizationID = Agency (Division) name as listed in the HMIS. [Logic is in place to allow entries of greater than 8 characters but OrganizationID must be an exact match to Agency (Division) listing in HMIS.]

OrganizationName = Agency (Division) name as listed in the HMIS.

Program Name = Program Name as listed in the HMIS. Must be an exact match to an existing program.

ProgramID = Program ID as listed in the HMIS. The HMIS system administrator can supply this information if it is unknown.

Tracking Method = will always be "0".

SourceID = Agency and Database Name - there's flexibility here but looking for something like "ABC Agency PDQ Database".