



HMIS REFERENCE GUIDE

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PART I – USER MANUAL

OVERVIEW AND BACKGROUND

Some agencies prefer to use a paper intake form. Other agencies will want to use the computerized intake form. If you want to start with the computerized form, skip step 1 below.

Reporting Steps

1. Write down client's responses on the *paper* HMIS during the interview. File this form in a secure file cabinet, and use it to make written updates as needed;
2. Enter information onto *computerized* HMIS, and push the appropriate button(s) to send info to HW over the Internet. Save this form on a secure computer and re-open it to update as needed;
3. At reporting time (different for each agency), a designated staff person downloads the info for the entire agency (see p. 11?) and runs a report using HW-provided software.

What version of HMIS should you use?

The form year shows in red bold ink at the center top of every page. HUD program years are confusing: so, for example, your **2004** year might run from

Aug 1, 2003 to July 31, 2004

or

Dec 1, 2004 to Nov 30, 2005!

Confirm you are using the right form by talking with your administration. It is likely that your agency has shared this information with the point person for the entire continuum as part of the SuperNOFA grant submission.

There is also a short form and a long form. The difference is that one contains only the information required for an APR and the other contains other fields HUD would like you to ask if possible. On the longer form, the required fields are in blue ink.

PREPARE YOUR COMPUTER

These requirements are necessary both to operate HMIS and to protect client confidentiality.

1. Software requirements:

- ✓ **Adobe Acrobat version 5 or later. This is the “full version” and is *not* free.** Make sure you are not using Acrobat *Reader* software, which looks very similar, but does not cost and will *not* let you store client information.
- ✓ **Some means of making backups: otherwise, if your computer crashes or develops problems, you will lose too much work. Also HUD requires this back up as part of a legally sanctioned HMIS: Choose any one of the following:**
 - ❑ a Zip Drive with QuikSync software attached (250 or 750 mg drive for \$60-\$70.
 - ❑ a Pen Drive (only for agencies with small client loads.)
 - ❑ a CD Burner
 - ❑ a Network Backup.

If you aren't familiar with these, talk with your Information Technology person or your CoC Coordinator. This step is crucial because if your computer dies, you will have to reenter ALL the client's information on the forms from the beginning. **HousingWorks can't help you at this point:** *because we are set up to protect client confidentiality (and/or anonymity) we cannot recover your lost data.*

- ✓ **Antivirus software – including automatic update capabilities.** If you aren't familiar with this, talk with your Information Technology person or your CoC Coordinator.
- ✓ **A computer with sufficient hard drive space and at least 128 MB RAM.** This computer:
 - ❑ should be set to run Disk Scan and Disk Defragmenter automatically each week.
 - ❑ should be set to download operating system software updates automatically.

If you aren't familiar with all these procedures, ask your *Information Technology* person or your CoC Coordinator. If you are not comfortable working the basic parts of a computer, consider a class at the local adult education school. HousingWorks has found that we can't teach someone these skills over the phone.

2. Set up your computer

- a. Right mouse-click to insert a new folder in your My Documents folder. You'll get a “drop down” menu – drag the mouse over the “dropdown” menu and left-click on “New Folder”. This will create a new folder that you should name “**HMIS, etc.**”

In each HMIS folder you will create some additional folders, you will store your client files, and you will possibly store one or more of these other files that HousingWorks may send:

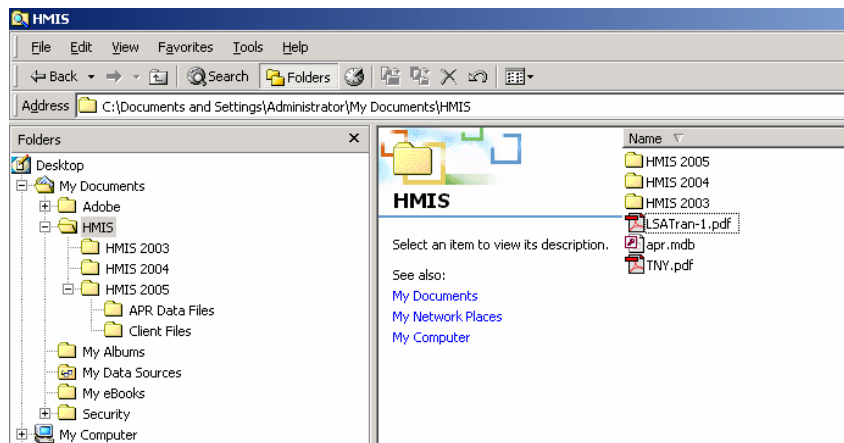
- ARC.pdf (or something like that)
- TNY.pdf form
- TDA.pdf form
- APR.mdb (this is the Access database that HousingWorks provides you to run reports)

If HousingWorks provides these files to you, they will most likely come as links in an email.

- b. Create the following folders inside the HMIS folder, by using these steps: Double-click inside the HMIS folder to create two additional folders inside it, using the names:

2004 HMIS
2005 HMIS
etc

- c. Inside each folder create two more folders, using the names:



- **Client Files** (This folder will contain all the *Intake Forms* for the year.)
- **APR Data Files** (This folder may contain the data file(s) that you download from HousingWorks to run your reports. If you are not the agency administrator or the continuum point person, you may not need to create this second folder)

In the Windows Explorer picture shown above, you can see the general appearance of the HMIS folder, the HMIS 2003, HMIS 2004 and HMIS 2005 folders inside that, and the folders inside each of these HMIS 200X folders.

NOTE: If using some types of back-up software that does not automatically do backups, you may want to create these folders on the backup drive as well.

3. Request the Appropriate HMIS Intake Form

Make sure you are using the correct form:

- ❑ The *standard* form sends all the data exactly as you type it. It is secure.
- ❑ The *disabled* form sends all the data exactly as you type it, except it does not send the client's name, SSN or birthdate. It is anonymous to a greater extent but not necessarily any more secure.

NOTE: It is possible to use the standard form and enter the names such as: *Client An1 Client An2, Client An3* so that the client's name is not even present on the forms that are locked on your computer. This is not any more secure than our other arrangements, but may provide a greater *feeling* of security for some clients or agencies, so is important. If this approach is used at even one agency, arrangements must be made continuum-wide so that a client served by multiple agencies uses the same anonymous code at all agencies, and so that the An1 and An10 do not eradicate each other's data since they will create the same Unique Identifier.

FILL OUT THE HMIS INTAKE FORM

- a) **Open the Intake Form for the appropriate year.** If you aren't sure which form to use, ask your CoC Coordinator. This form will be online and an email from HousingWorks will direct you to it. The address will be something like: <http://www.housingworks.net/hmis/MA-lynn2005/LHAND.pdf> where there is an HMIS directly, a directory for each continuum of care, and .pdf files for each program in that continuum.
- b) **Click once on the empty area at the top of the document**, and press the TAB key until you come to the "Initial Intake Date". **Use the TAB key to jump from box to box rather than the mouse, so that you don't accidentally skip fields.**
- c) **Words in blue ink** are fields you must answer if you want to run a complete APR.
- d) **Note the yellow boxes that say "Select One."** These are *list boxes*. **If a list box says "Select One" in blue ink, it is an APR required field.** If you click on them, a menu will "drop down" and you should then select an answer from the list provided. If you don't select an answer, the default answer will show as "Select One" which will send the value: "Opted not to answer" - which is an acceptable answer to provide to HUD.
- e) **A few fields are so important** that we won't let you send the data until you complete these fields. When you hit the "HMIS" button, if you get a little message saying, "the required field "yada yada" is missing", it means you have to find that question and answer it. All other fields are left to your discretion to complete.
- f) **Changing how (quickly) you jump through the form.** If you want to jump to certain fields while skipping others, call us and we'll tell you how to program the form to skip those questions that are not appropriate for your clients.

- g) **There are several *Question Marks* on the form:** Double-click any of these to get help related to that section of the page.
- h) **Rectangular Buttons** – There is a button on the top of each page that lets you submit HMIS any time you want. We recommend you do this only after the form is fairly complete. Emergency shelters may want to submit more often or earlier. There is also a button to open a separate Housing Search/Apply form. Finally, there is a button on the last page at the bottom right that lets you erase the form. You will want to use this last button **very rarely**.
- i) **Save the form by using the yellow “Save this file now!” button at the bottom of the first page.** As you will see, our form tells you to save each client’s Intake Form by his/her *Lastname, Firstname: Smith, John.pdf*. Another option is to save the file using the person's last name and his/her Unique Identifier, or using the person’s anonymous ID and alias. The thing to remember is, you will probably need to locate this file in the future, so use a system that makes it easy to locate.
- j) **Be sure to print a copy of each *Intake & Reporting Form* and also to store a “Back-up” copy on a zip drive, a Pen Drive, or your agency's network drive, if you have one.** (see next section: *Store and Backup Intake Forms*) When HousingWorks comes to a new continuum, we always provide a checklist of items they need to be HMIS-ready, and that checklist includes a discussion of backup and storage options.
- k) **Store all your client forms on your computer in a safe place.** [To be in compliance with HUD requirements about keeping this information secure, you should have at least the same security for your computer than you provide for the HUD paper files. Also, the back up files should be saved in a different location, in the event a disaster destroys your entire office. HousingWorks is not able to recreate your client files from the database, only your client data!](#)

STORE AND BACKUP INTAKE FORMS

Store the *Intake Forms* on your computer so you can locate them easily. [The back up copies and the back up software, such as a CD-ROM, zip drive or pen drive, should be stored in a separate location in case of fire or theft. Any good back up software should automatically make copies. If it doesn't it's not acceptable back up software.](#)

SHARE CLIENT INFORMATION WITH OTHER AGENCIES (optional)

The last page of the HMIS *Intake & Reporting Form* is a release form. If the client listed other agencies on this form, you have permission to contact those agencies and request a copy via email of the HMIS they filled out for this same client. You can then save yourself the time of filling out yourself. The import process is not hard but has four steps and requires the use of the TDA.pdf that you must request from HousingWorks. The basic instructions for how to use these forms are available by clicking the red question marks found on the release page of the PDF form.

REPORTS: GET APRs, WORKSHEET, and OTHER DATA

CoC Administrator Only:

To run the reports necessary as the administrator for the entire CoC – an unduplicated count and number of files reported by each agency – you must now locate and open the [apr.mdb reporting software](#), provided by HousingWorks and import the data. In one of our earlier steps we suggested you save this file in the HMIS folder inside My Documents. However, you may wish to download a fresh copy every few months, since we often make little improvements to it. Here is the place where we always put the latest copy:

<http://www.housingworks.net/hmis/apr.mdb>

Now here are the steps to getting your data file for the reporting period.

1. Go to www.housingworks.net and click “Enter HousingWorks”



2. Click “Registered Housing Reporter”

If you have questions about these directions, contact your local CoC representative, who can decide where to forward the questions.

- On the next page, enter your ID (the ID is an email address) and your password (which will be something assigned by HousingWorks) and click the “sign on” button. **The ID and password are case sensitive, which means you must type them exactly the same way you get them from HousingWorks!**

- You'll then see the following page . . .

. . . which lets you do the following: **Select Form Year** under **Generate My Reports**, and then enter the reporting year for which you want data as “2004”, “2005” etc. **The other options shown on this page may not yet work but there are ways to get the particular data you want, anyway. Just call us at 671 504-0577 if you ever want to do this.**

HousingWorks staff members are responsible for assigning permissions to this part of our system. Currently, we allow a CoC point person to download all the data and run all the APRs as it is less work for every agency. HousingWorks staff members also offer a “quality assessment” at 30 days, 90 days and just before SuperNOFA reporting time. Alternately, we can train a point person in your CoC to handle this task. The purpose of this is to make sure that your staff have not misunderstood a question and are not doing something that will have to be Undone at year’s end on a lot of client forms.

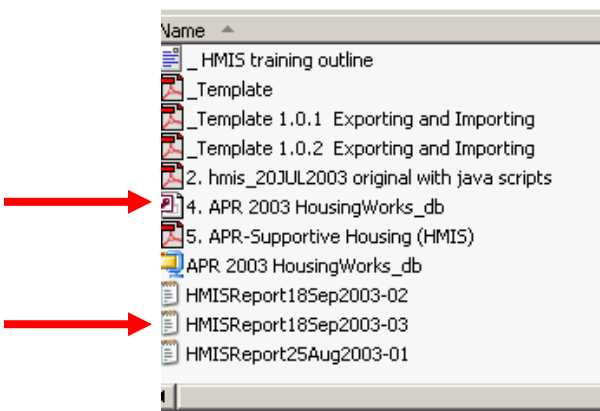
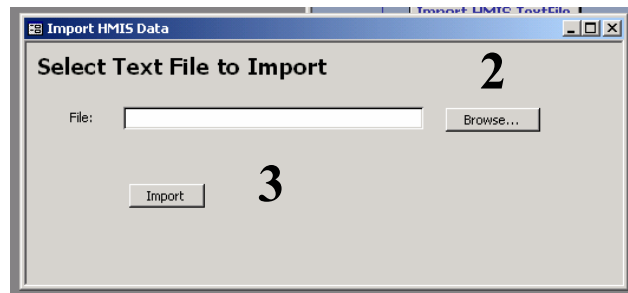
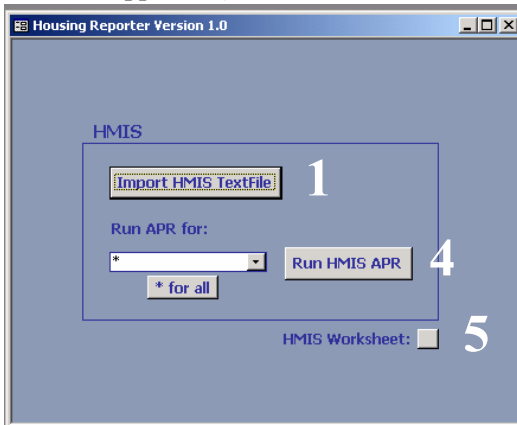
CoC administrators: When you download the Data File, follow these necessary steps.

- ❑ When you are downloading the data file, select *Save* and not *Open*.
- ❑ Note the last two digits of the file you are about to save.

- ❑ Save the text file in the HMIS folder inside your *My Documents* folder – ***note that we will have trouble helping you with any of the next steps unless you follow this request.***

You can now use your data in several ways:

- A. **You can open the file and view it in Excel.** Opening it in Excel makes it easier to merge other data files that you need to include. Be sure to save the result as a txt file, however, so that you can import it into our APR.mdb.
 - B. **You can open the Access database provided by HousingWorks ‘APR.mdb’** and import the data to:
 - ❑ run an unduplicated count for the continuum;
 - ❑ monitor how many clients each program, department or agency is submitting;
 - ❑ run a continuum-wide APR;
 - ❑ run individual APRs for each grant;
 - ❑ print a worksheet for the entire continuum **or** for each program, so that you can hand count and verify the accuracy of the APR numbers;
 - ❑ use some of the APR numbers to help answer the AHAR report. The data file as submitted off the HousingWorks AHAR form will provide all the answers you need to run queries for the AHAR (*some of the answers for the AHAR can be found on the APR anyway, because they cover similar ground - we’ll talk about designing some additional queries to answer a few AHAR questions.*)
1. To run your APR, open the apr.mdb, and click the *Import HMIS Text File* button (see white number 1 on the blue picture). Next, click the Browse button in the grey dialogue window that appears. (see black number 2 on the gray picture)



- 2. When you hit the Browse button shown in picture 2 you’ll suddenly be looking in the folder where the *apr.mdb* is – and you should see the data file you just downloaded (see red arrows in picture 3 to the left). Each data file you download has a different name because the name includes the date you downloaded it.
- 3. Double click on the data file you want to import and you’ll be taken back to the grey window that you see

your local CoC representative, who can decide where to forward the questions.

in the **Grey Picture 2**. Now, just click the “Import” button (see the black number 3 in picture two) and that will import your data into the Access.

4. You’ll get a note that says, “Your data was imported successfully” - or rarely, you might get a note that says, “There were some data import errors”. In either case, you’ll be able to run your reports so just go ahead. Click the ‘Okay’ button when the system tells you your data was imported, with or without errors. That will take you back to the **blue Picture 1** shown on the previous page.

Now, in the list box shown in the blue picture on the previous page, select which agency or program for which you want to run the APR and the worksheet. **Alternately, you should leave the asterisk present if you want a continuum wide unduplicated count.**

5. Once you’ve indicated the program, agency or continuum data that you want to analyze, click the *Run HMIS APR* button. This will not only run an APR, it will let you to monitor how many files have been submitted by each program. You can do this at any time, as often as you wish.
6. **Running data on a selected time period.** If you want to run any reports or the worksheet on a specific set of dates, go back to the data file that you imported and right click it, then say “Open with MS Excel for Windows”. This will show you the data in an Excel format. You need to now get rid of the clients whose Intake Dates don’t belong in the reporting period. Locate the “date of Intake” column, by hitting the Control key PLUS the letter “f” key and typing “dateOfIntake” in the little dialogue window that appears. Then hit the “Find Next” button. This will jump you right to the column that has all the Client Intake dates in it. Currently, it is column AE in the Excel worksheet.

Click on the header that says “AE” so that the entire column is selected. Then go to the Excel menu “DATA” and select “Sort” from this menu. When you’re asked if you want to expand the selection, say “YES”.

A new window will appear that asks you what column you want to sort this Excel document by. Most likely, the column you have already highlighted (the “AE” column or “dateOfIntake” column) will show automatically in this window. Just hit the OK button - this will then sort the client data by date of intake.

Remove all the intakes that don’t fit into the period of time you want to monitor.

Having deleted this chronologically inappropriate data, just close the entire Excel file, following these steps exactly: Hit FILE/Exit and then hit “Yes” “Save” “Yes” and Yes”-- that’s four different instructions. *All this does is put the file back as a text file, minus the clients you deleted, so that you can import it into the Access again.* Now you import the data file using steps 1-5 as shown above.

Individual Program Access to Data

[NOTE: this feature is not yet available but may be by the time you read this manual.] Individual programs may access their own data, by following the steps shown above. You will need to request an ID and password from HousingWorks in order to do this. This ID and password will automatically limit you to your own program’s data.

QUALITY ASSURANCE: DATA AUDITS - FIRST STEPS

The staff person responsible for quality assurance should audit data after each program has submitted an initial small set of client files, to assure it is being entered correctly and to save staff the trouble of having to make many corrections late in the year. Data should also be audited on a quarterly basis. This ongoing monitoring of data will save everyone time, ensure accuracy on your APR, and save everyone except the quality assurance person from a painful afternoon's work.

1. Right click a downloaded data file and choose, "Open with MS Excel"
2. Once file opens in Excel, click on it once, then hit "CTRL + A" (select all) and then go to the menus: FORMAT/Column/Autofit Selection. *This expands all the columns so that you can see the data clearly.*
3. Sort by column AE (date of intake); scroll to end of file and delete entries made after end of program year.
4. Sort by column F (program agency ID).
5. Sort by column M (last name).
6. Delete data for all but the specific program being audited.
7. Look through file for "garbage" symbols, i.e., ##@\$
8. Select columns N through AP - hide them by right clicking on any of the elected column headers: "N, AP or any column header in between these), and then, from the resulting drop-down menu, selecting *hide*.
9. If client names were submitted, delete duplicate names EXCEPT the last row, which contains cumulative data for all previous entries. **NOTE: Do NOT delete any rows if you are also doing Bed Reporting statistics, or participating in the national AHAR pilot program.**
10. Check for spelling mistakes in surnames and delete misspellings; also check SSN and DOB to confirm duplicate names are indeed misspellings.
11. After deleting all duplicate entries check number of HoH vs. HoH total on APR cover page – the total of column AQ should equal unduplicated count figure on APR cover page.
12. Next, CTRL + A (Select all) and right click on any column letter to *unhide* all columns.
13. Checking that dates are entered correctly – here are various ways to validate:
 - a. Check all dates [columns P, AE, AH, CA, CH, EY, FA]. Not all columns will have dates for all rows, but if dates haven't been entered correctly, they will be *left aligned* in the column. Dates that are entered incorrectly will result in wrong answers for your APR, so these dates must be corrected on both the original PDF forms, which must then be resubmitted, and in our database. Contact HousingWorks at 617 504-0577 after the original PDFs have been corrected and resubmitted, so that we can alter the dates in the existing database or remove the original data rows.
 - b. Go to column Q and check if any ages are missing or if "NaN" [not a number] displays. If age is missing it must be added or Table 5 queries won't work. This may mean *estimating* a client's birthdate on the original PDF files. Again, the original PDF files must be corrected and resubmitted and HousingWorks must be contacted as well.
 - c. Check column EX: if it shows the answer: "y", (meaning the client has left the program) then columns EY and FA *must* be filled out as well (*Client Exit Date*, and *Date the Exit Income was Re-assessed*. These two dates are generally the same.)
14. Check the *dollar amount* columns [CG, EZ]. No cell should be blank but should at least have a "0" entered.

QUALITY ASSURANCE: APR AUDITS – SECONDARY STEPS

1. If you have made any changes to any PDF forms based on the Quality Assurance steps on page 1, download the data file again
2. Download a copy of the **APR Reporter** from this link: (Be sure to get a fresh copy every time you use it). <http://www.housingworks.net/hmis/apr.mdb>
3. Using the **APR.mdb**, import the data file (*Browse* button, then *Import* button) and then select the program ID for which you want to run an APR.
4. Press the Worksheet button in the lower right hand quadrant of the window. You will note that the client data is alphabetized by the unique, anonymous identifier.) Print this out. Typical of an APR worksheet, the client data runs across two pages, so be sure to take the first two pages, line up the rows of client data and tape them together. Do the same for the next two pages, etc. etc.
5. Think strategically to get through this “not fun” part as efficiently as possible. It is recommended that this worksheet be examined over by someone who has already submitted some successful APRs in the past.
6. Look at the worksheet columns that relate to each other: for instance, if the column “New participant” says “Y” then the “Entry Date” column should show a date that is within the limits of the program year you are reporting. Another example: if the column “Client has left program” has a “Y” then an exit date should appear in the column next to it. If this data is missing, then the APR will report incorrect answers and you may receive a personal visit from HUD.

PART II – HW STAFF ONLY

TRANSFERRING CLIENT DATA TO NEXT YEAR'S FORMS

To transfer client files to next year, use the TNY.pdf form (do not skip any steps!)

Step ONE: First, have HousingWorks staff check the data you already submitted to make sure you are not carrying over mistakes into the next year.

Step TWO: Figure out what version of Adobe Acrobat you have on your computer

The software menus on Acrobat 5 include:

FILE, EDIT, DOCUMENT, TOOLS, VIEW, WINDOW, HELP

The software menus on Acrobat 6 include one extra item:

FILE, EDIT, DOCUMENT, TOOLS, **ADVANCED**, VIEW, WINDOW, HELP

Step THREE: Transfer data using the step-by-step instructions below:

OVERVIEW: You will need a copy of the **TNY.pdf** (“Transfer to Next Year” form) which you can download from: <http://www.housingworks.net/hmis/TNY.pdf>

To transfer data to the next year’s form, there are four steps. You must:

- 1) export each 2004 client form which is called a “.pdf” and “export the data”. This will produce a file that ends with “.fdf” (Terminology: “The PDF exports a file that is an FDF.)
- 2) import the .fdf data file into a temporary form we call the TNY.pdf (this step is absolutely necessary!)
- 3) Export the data again out of the TNY.pdf form. You won’t know it but it just got cleaned up so that the transfer would work.
- 4) Last of all, import each .fdf file into the new, 2005 PDF form and save it as Lastname, Firstname.

Acrobat 5 users will find directions starting on page 2.

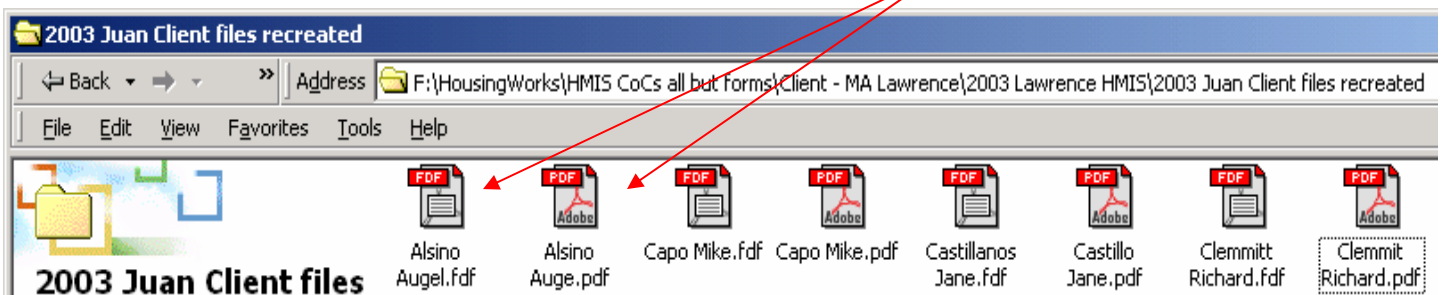
Acrobat 6 users will find a different set of directions on page 4.

Acrobat 5: Transfer to Next Year's Form

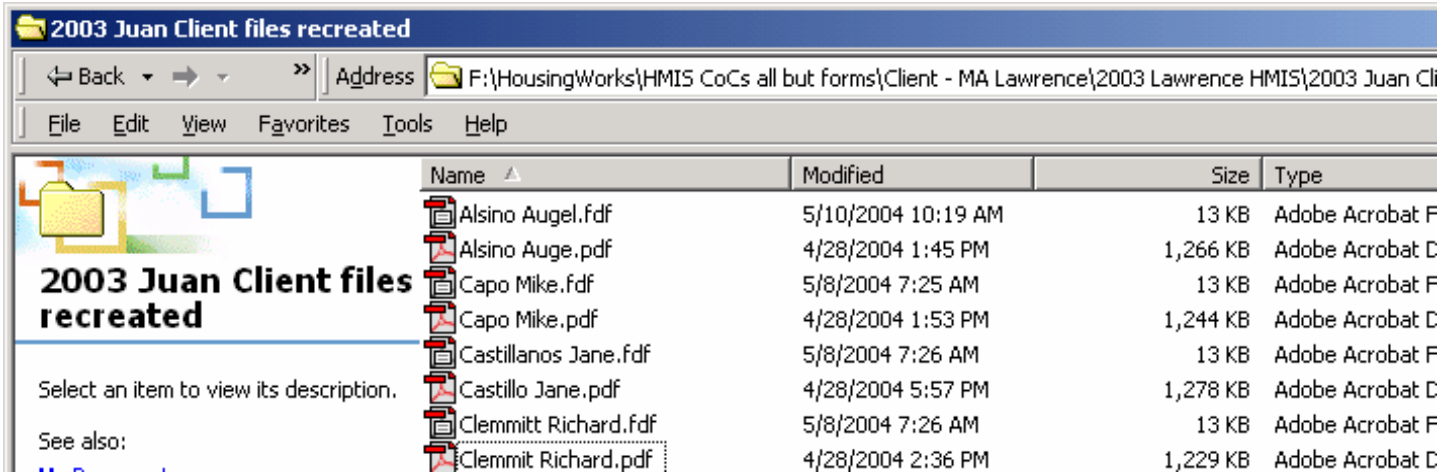
Step-by-step instructions

1. **Go to the HMIS folder where you have all your client's files for the year.** This folder should be called *2003 HMIS* or *2004 HMIS*. Create two new folders: *2005 HMIS*, and *Transfer HMIS*. Go into the current year's folder, click on all the people's names that carrying over into the next year's report: copy these files and put them into the new folder called *Transfer HMIS*.
2. Go to the *Transfer HMIS* folder and open up each of the client files that you want to transfer to the new year. Click **File** > *Export* > *Form Data* once for each file. This will copy all the data on the form and put it into a little file. The export will happen so fast, it will seem as if nothing happened, but you should get a "Save?" dialogue window. The "Save?" dialogue window will suggest the name you should use to save the export file. Also, The "Save?" dialogue window will ask you to specify a location to put the new exported files – we want you to save these little export files in the same *Transfer HMIS* folder, where you already are.
3. **Repeat step 2 for all client files that are carrying over into the next year.** *This export is very fast, but if you have lots of clients, it will still take you awhile.*
4. **When you are done exporting all the files,** look in the *Transfer HMIS* folder - you will now see two files for each client, only one file is much smaller than the other and has a slightly different appearance to the icon. Look at the three pictures below - one of these pictures is probably what you will see.

Picture 1: note how there are two *Alsino Augel* files and how one looks different than the other. Also note that one ends with *.FDF* and the other ends with *.PDF*



Picture 2: see how there are two *Capo Mike* files. Note how one icon looks different than the other, and how one file is much smaller in size than the other.



Picture 3: See how there are two *Alsino Augel* files, and how one ends with “.fdf” and the other ends with “.pdf”



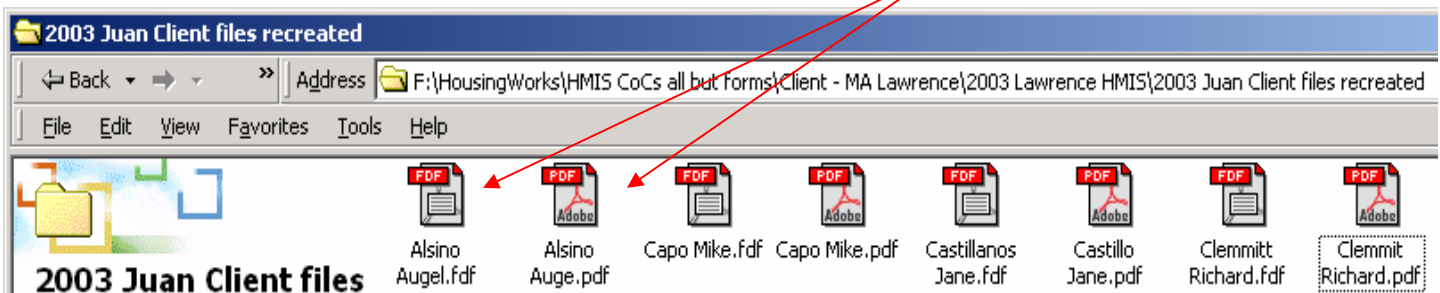
5. Open the form **TNY.pdf** that HousingWorks staff should have emailed you: If you don't have a copy of the TNY.pdf file, email us at support@housingworks.net with the following message: "Please send me the TNY.pdf file". **Follow the four steps shown in the TNY.pdf form.**
6. Step 4: Open the next year's HMIS form, import one of the new "Lastname Firstname 2005" .fdfs that you just created in step 5 (*File > Import > Form Data*), then save it as "Lastname Firstname" in the 2005 folder. Essentially, you have taken the cleaned up data and put it into a new 2005 form.
7. You will need to go through each form and add a few things, mostly to page 3 in particular but perhaps the very bottom of page 2 as well. This client is then ready to submit to the next year's APR, or you can wait and add more information that happened to the client in this new year, such as *Program Exit* info.

Acrobat 6: Transfer to Next Year's Form

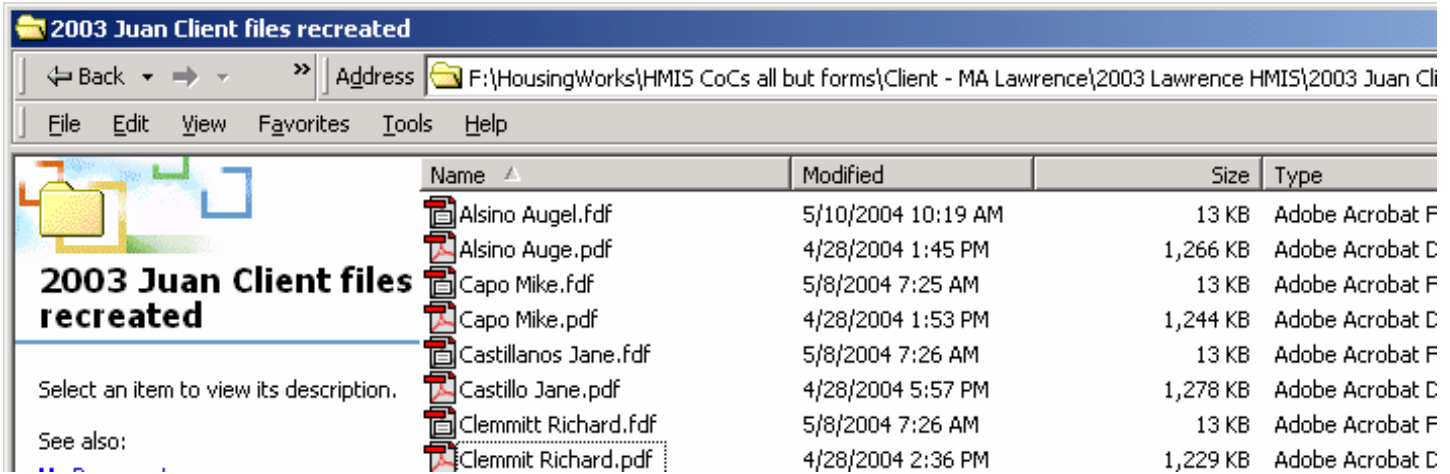
Step-by-step instructions

1. **Go to the HMIS folder where you have all your client's files for the year.** This folder should be called *2003 HMIS* or *2004 HMIS*. Create two new folders: *2005 HMIS*, and *Transfer HMIS*. Go into the current year's folder, click on all the people's names that carrying over into the next year's report: copy these files and put them into the new folder called *Transfer HMIS*.
2. **Go to the *Transfer HMIS* folder and open up each of the client files that you want to transfer to the new year.** Click *Advanced > Forms > Export Forms Data*. once for each file. This will copy all the data on the form and put it into a little file. The export will happen so fast, it will seem as if nothing happened, but you should get a "Save?" dialogue window. The "Save?" dialogue window will suggest the name you should use to save the export file. Also, The "Save?" dialogue window will ask you to specify a location to put the new exported files – we want you to save these little export files in the same *Transfer HMIS* folder, where you already are.
3. **Repeat step 2 for all client files that are carrying over into the next year.** *This export is very fast, but if you have lots of clients, it will still take you awhile.*
4. **When you are done exporting all the files,** look in the *Transfer HMIS* folder - you will now see two files for each client, only one file is much smaller than the other and has a slightly different appearance to the icon. Look at the three pictures below - one of these pictures is probably what you will see.

Picture 1: see how there are two *Alsino Augel* files and how one looks different than the other. Also note that one ends with *.FDF* and the other ends with *.PDF*



Picture 2: see how there are two *Capo Mike* files. Note how one icon looks different than the other, and how one file is much smaller in size than the other.



Picture 3: See how there are two *Alsino Augel* files, and how one ends with “.fdf” and the other ends with “.pdf”



5. Open the form **TNY.pdf** that HousingWorks staff should have emailed you: If you don't have a copy of the TNY.pdf file, email us at support@housingworks.net with the following message: "Please send me the TNY.pdf file". **Follow the four steps shown in the TNY.pdf form.**
6. Step 4: Open the next year's HMIS form, import one of the new "Lastname Firstname 2005" .fdfs that you just created in step 5 (*Advanced > Forms > Import Forms Data*), then save it as "Lastname Firstname" in the 2005 folder. Essentially, you have taken the cleaned up data and put it into a new 2005 form.
7. You will need to go through each form and add a few things, mostly to page 3 in particular but perhaps the very bottom of page 2 as well. This client is then ready to submit to the next year's APR, or you can wait and add more information that happened to the client in this new year, such as *Program Exit* info.