

## QRG – SSVF Reporting

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**WHAT IS A QRG** – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-4 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

**WHO THIS GUIDE IS FOR** – This guide is useful for Case Managers and System Administrators who will be generating SSVF export files for upload to the VA. Please note that certain steps of the process require System Administrator role access.

### RECOMMENDED PREPARATIONS FOR SSVF REPORTING

It is recommended that you run an APR 1-2 times a month to assure that data being captured is accurate.

### OVERVIEW OF SSVF REPORTING

Generating the SSVF report and uploading it to the VA is a 3-step process.

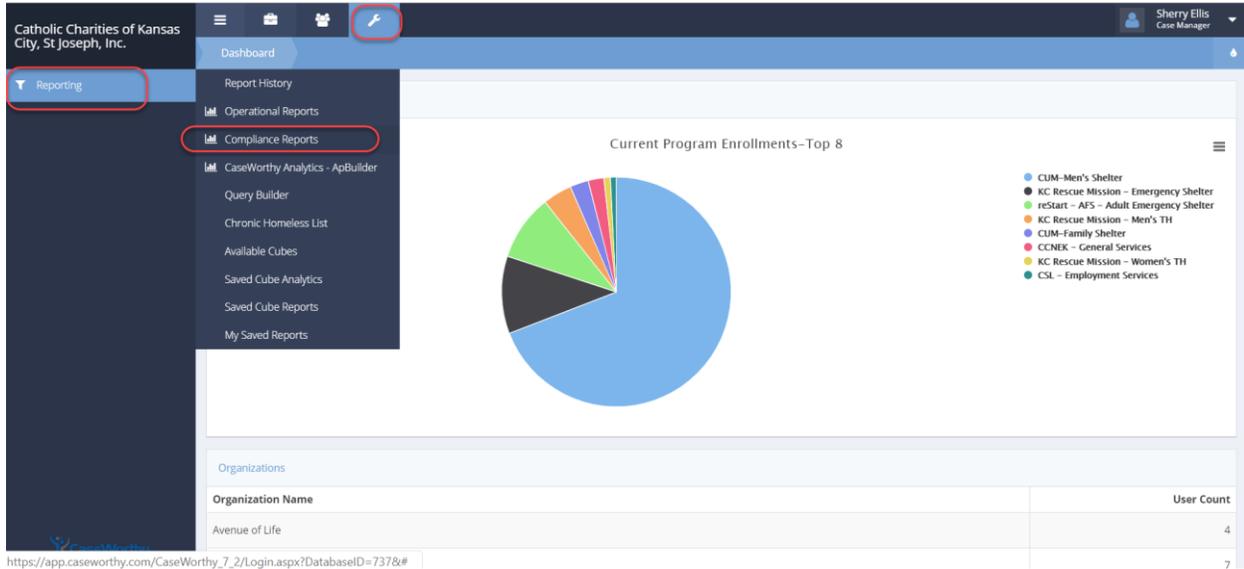
| Step | Details                          | HMIS Role Requirement                |
|------|----------------------------------|--------------------------------------|
| 1    | Generate the SSVF Export file    | Case Manager or System Administrator |
| 2    | Download the export file         | System Administrator                 |
| 3    | Upload the export file to the VA | N/A                                  |

This guide focuses on steps 1 and 2, both of which are completed in KC Metro HMIS. For more information on the 3<sup>rd</sup> step, reach out to the SSVF program administrator for your agency.

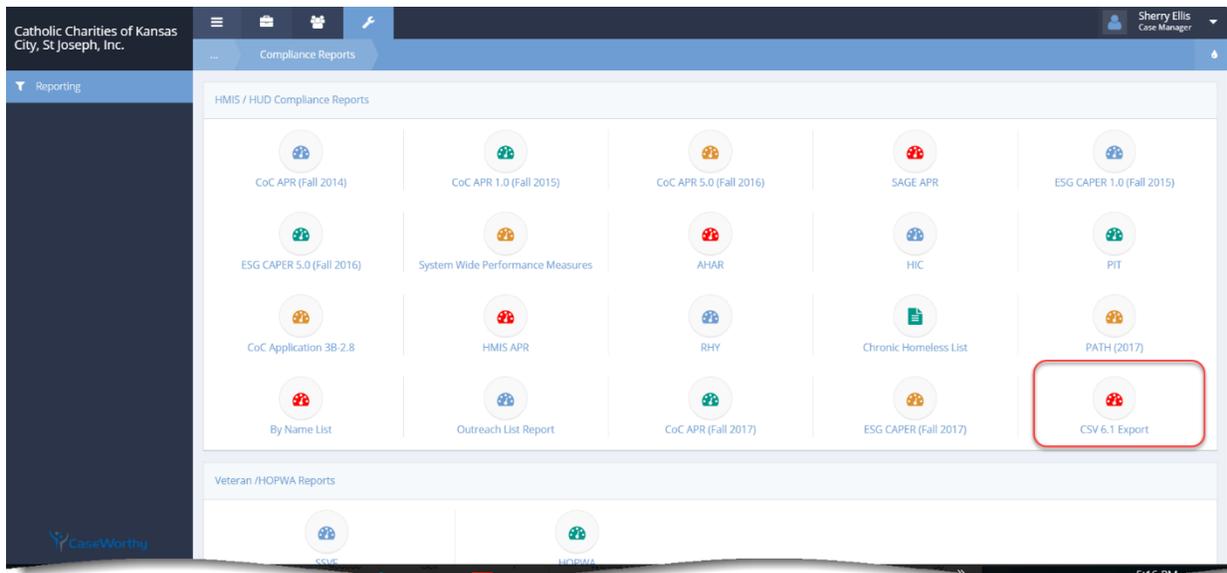
**STEP 1: GENERATING THE SSVF EXPORT FILE**

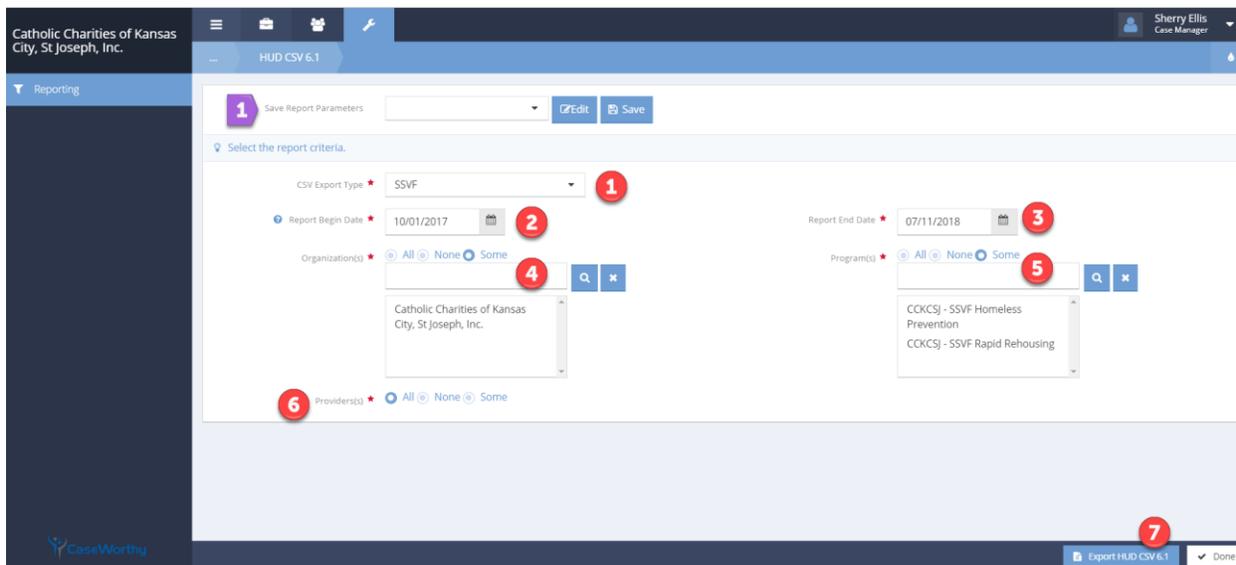
This step can be completed by both roles (Case Manager and System Admin). The report generated will be in the form of a zipped file (.zip).

Go to *Administration : Reporting : Compliance Reports*



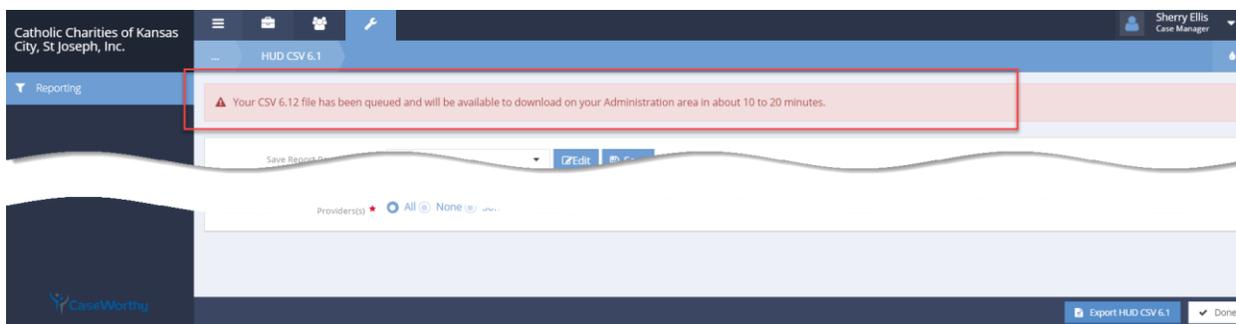
From the section *HMIS/HUD Compliance Reports* select *CVS 6.1 Export* icon





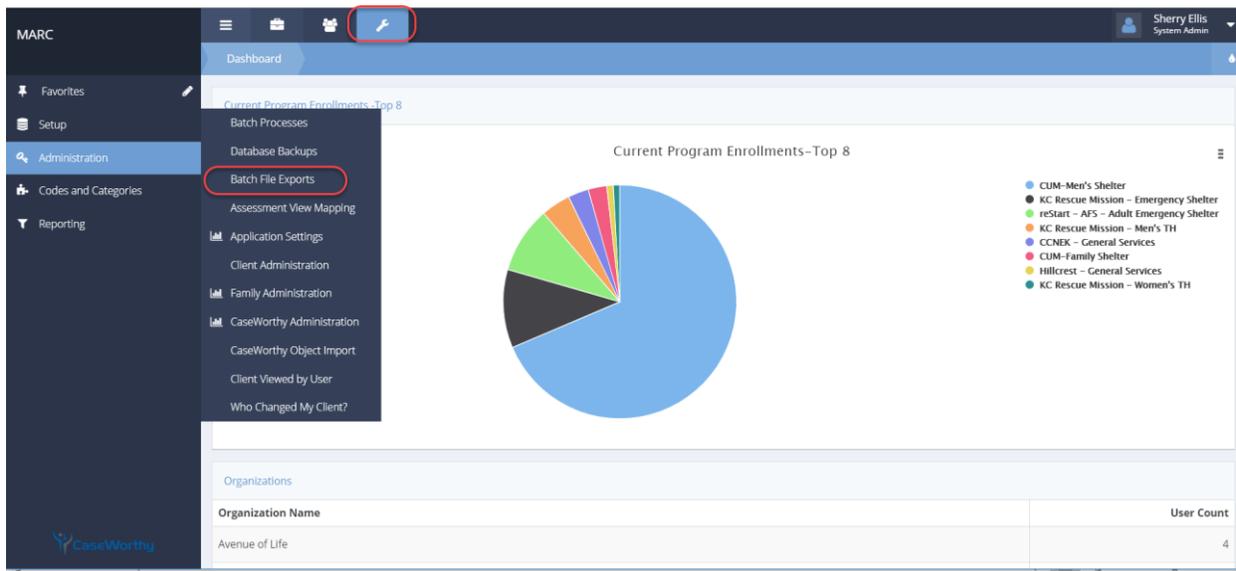
| Step # | Field/Button  | Info  |
|--------|---|---|
| 1      | CSV Export Type   | Select SSVF from the drop-down list   |
| 2      | Report Begin Date   | Enter the beginning date parameter  |
| 3      | Report End Date   | This field must be the same as the date the report is uploaded to the VA.   |
| 4      | Organization  | Select the <i>Some</i> option and then select your organization.<br><br>You also have the option to select <i>All</i> and not provide a specific org. |
| 5      | Program(s)  | Select the specific program(s) you would like to include in the report (all programs will have SSVF embedded in the name.)                            |
| 6      | Providers   | Typically, this field is left at the <i>All</i> selection.  |
| 7      | Export HUD CSV 6.1 <i>button</i>  | Click here to generate the CSV file.  |
| 1      | Using the Save Report Parameters is not covered in this QRG, though you may find it helpful when generating this report on a regular basis. Please reach out thru <a href="mailto:hmishelpdesk@MARC.ORG">hmishelpdesk@MARC.ORG</a> to request guidance. |   |

Once you click on the *Export HUD CSV 6.1* button you will receive a system message:



**STEP 2: DOWNLOAD THE EXPORT FILE**

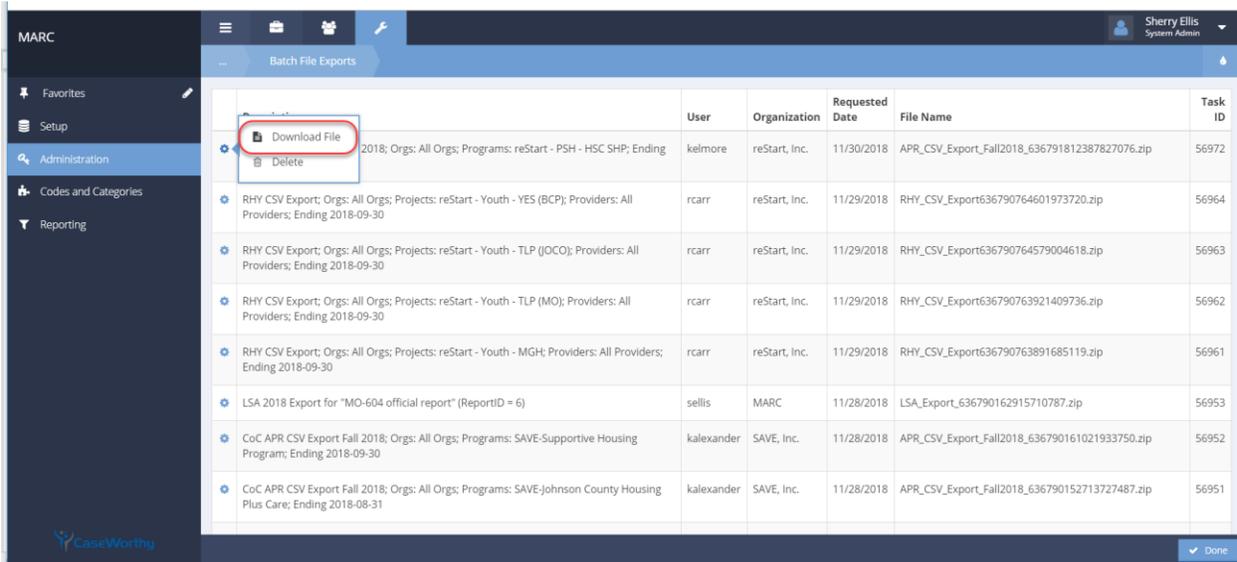
This step can ONLY be completed for someone in the role of System Admin. If you do not have this role as an option please reach out to your Agency’s Super User for direction, or, contact KC Metro HMIS support: [hmishelpdesk@MARC.ORG](mailto:hmishelpdesk@MARC.ORG)



This is the list of all recent batch export files available (for all HMIS users). More than likely, your record will appear at the top – look for the record which has your *User*, *Organization* and *Requested Date*. The *Description* identifies the parameters used to create your report.

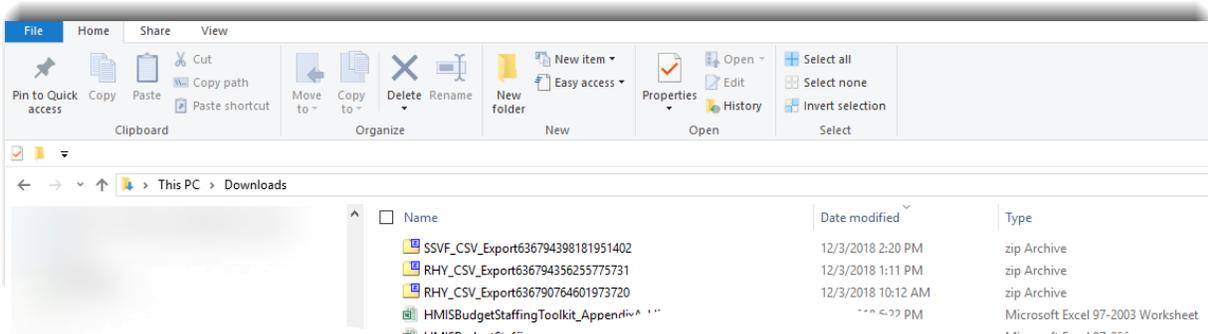
The actual name for the generated file can be found in *File Name* column. If the *File Name* field is blank that just means that HMIS is still generating the report. In this case wait a minute or two and then refresh your screen. Once the name appears in *File Name* for your record you are ready to download.

To download the SSVF zip file click on the Gear Wheel  for you record and select *Download File*.



Use the functionality of your web-browser to save the downloaded file. (some browsers automatically download it to a folder called “Downloads”).

Here is a screenshot of a downloaded report using Google Chrome.



The final step of this process is to upload the zip file to the VA, which is not covered in this QRG.