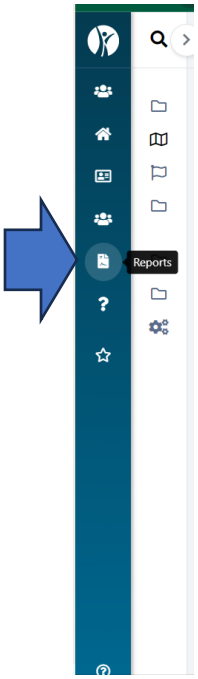
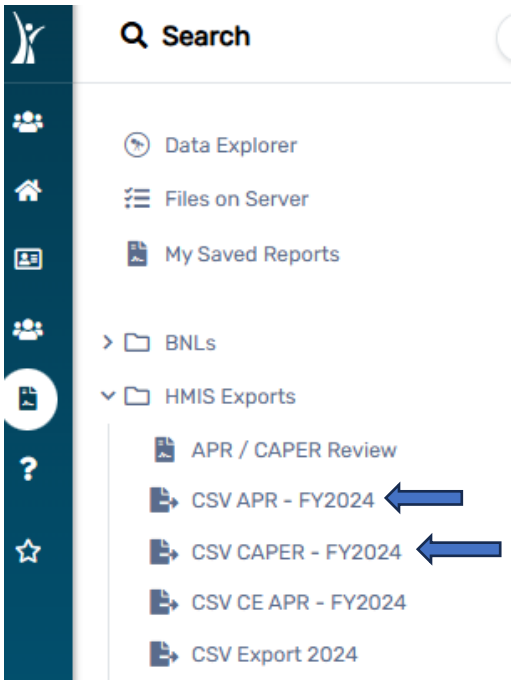
ClientTrack CAPER/APR Export SOP

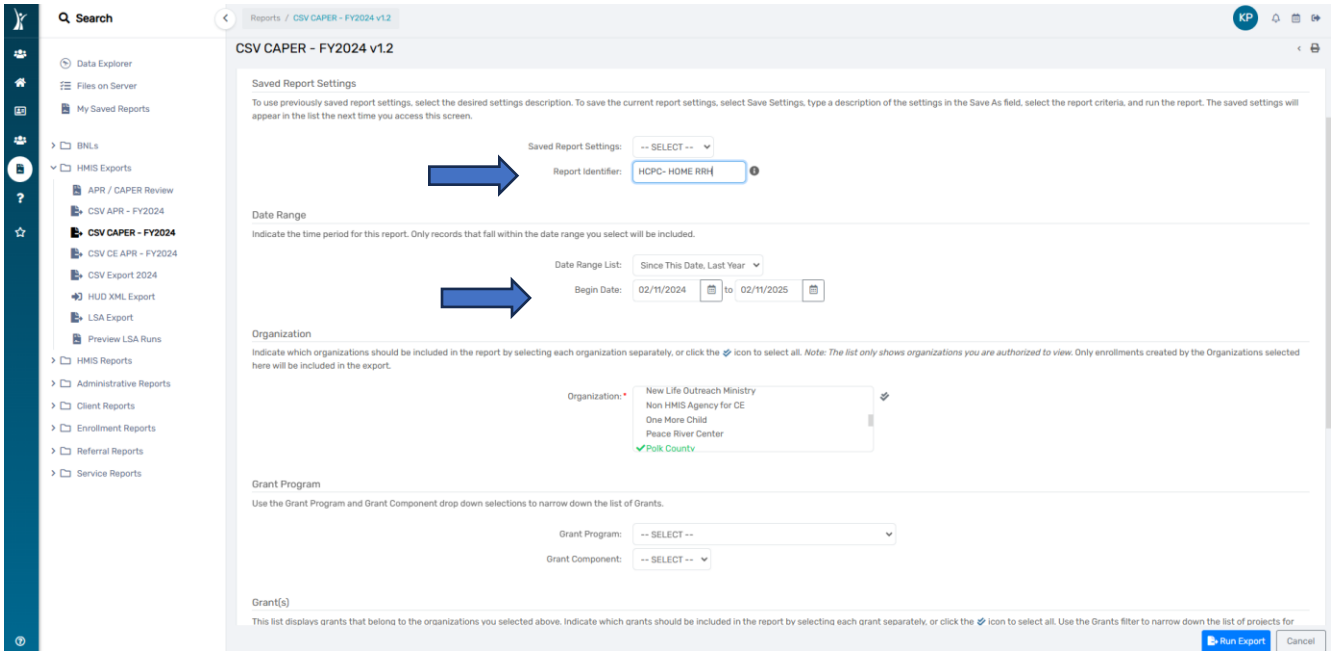
First locate the “Reports Icon” located on the Blue Ribbon on the left side of the screen.



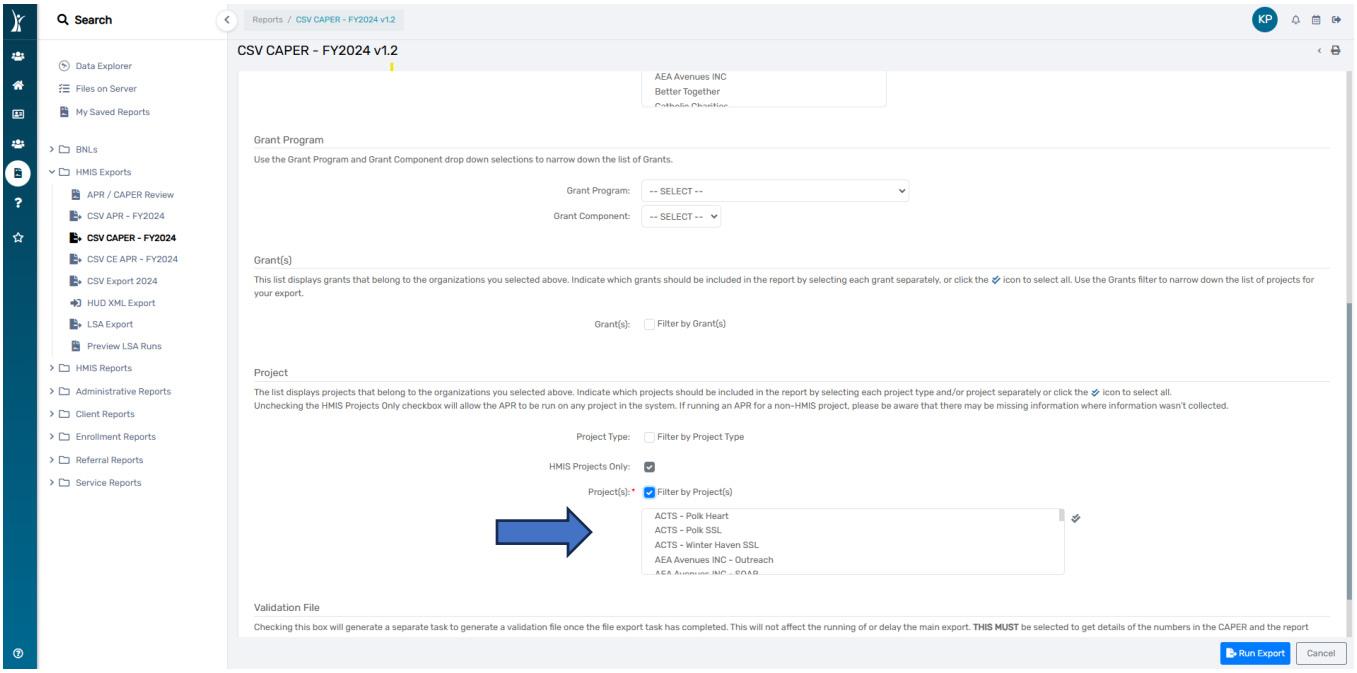
Once the report tab has been selected, please navigate to the “HMIS Exports” folder. You will next select “CSV CAPER – FY2024” OR “CSV APR - FY2024”



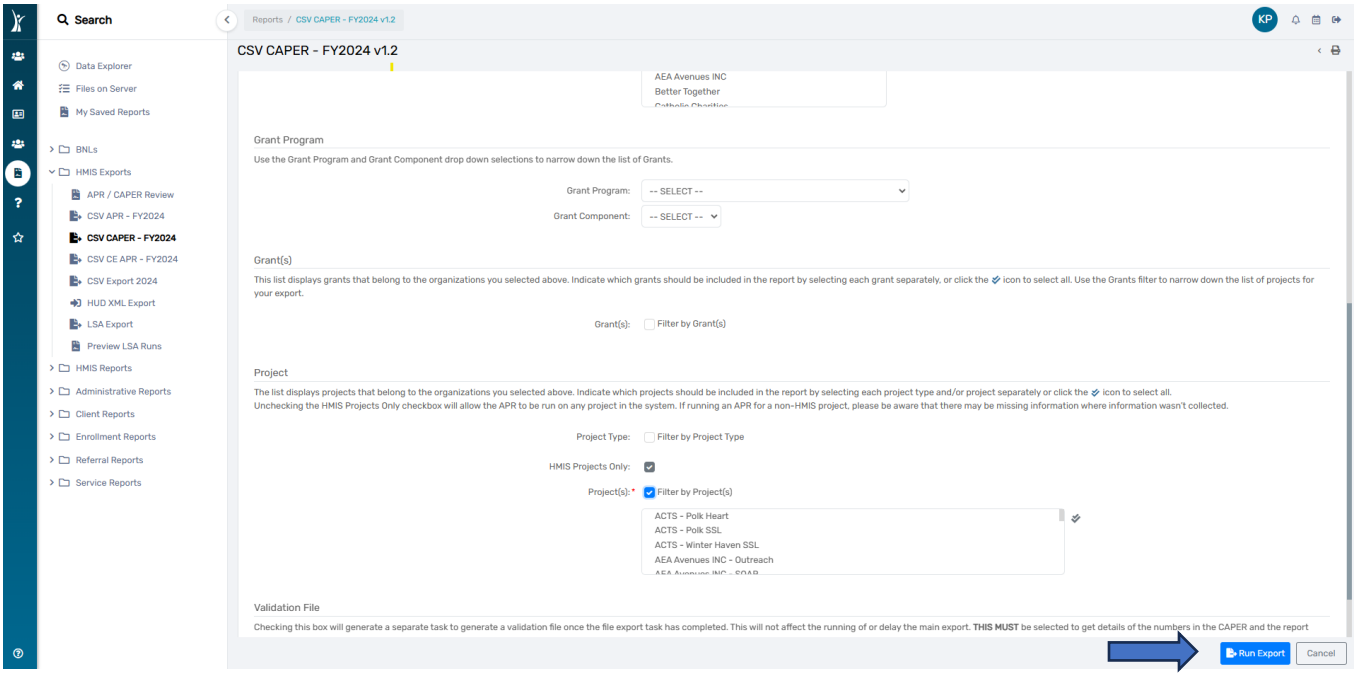
You will then continue to update the following selections: “Report Identifier”, “Date Range”, “Filter by Project(s)”. Please note that the “Organization” will automatically default to your assigned organization. You can fill out report Identifier with the specific project(s) you are reporting for to help identify that report once completed.



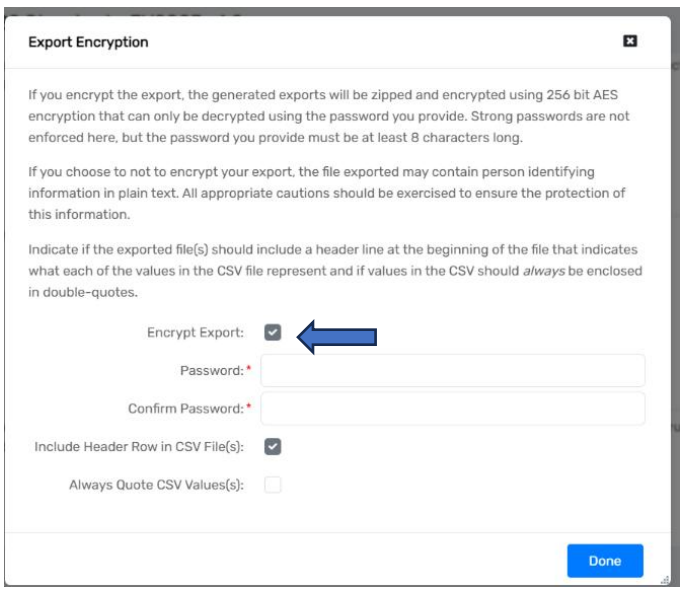
Only your organization’s projects will be displayed.

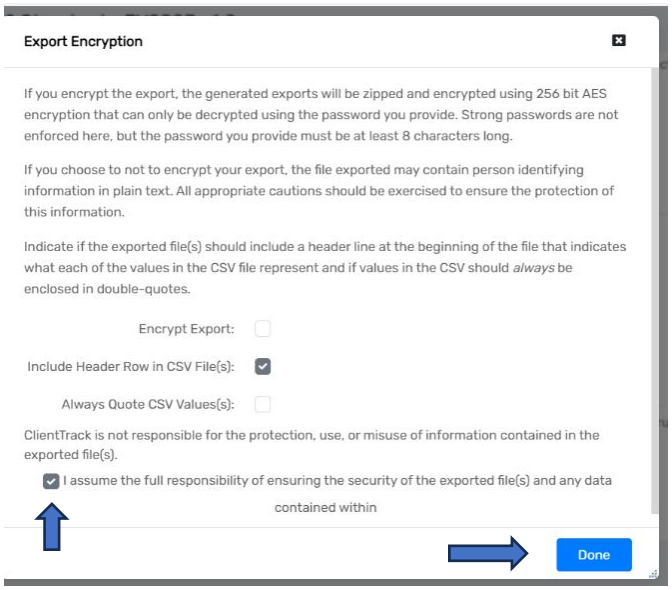


Once the desired Project is selected you will then select the Blue “Run Export” Button at the bottom right of your screen.



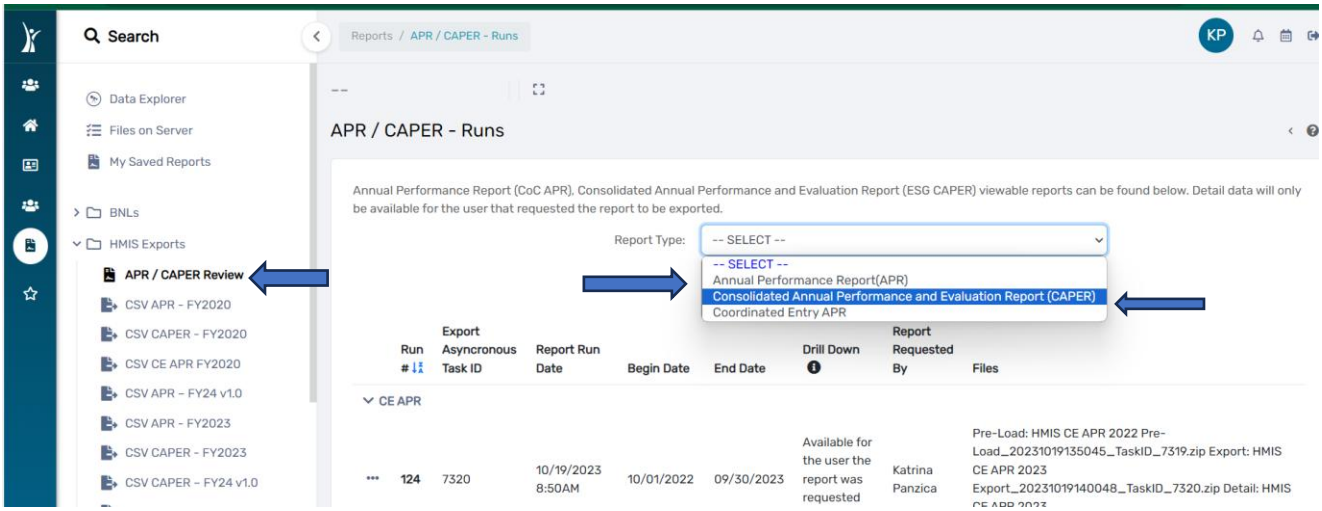
An “Export Encryption” box will populate. Please *uncheck* “Encrypt Export” and *check* “I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within”. Select “Done”



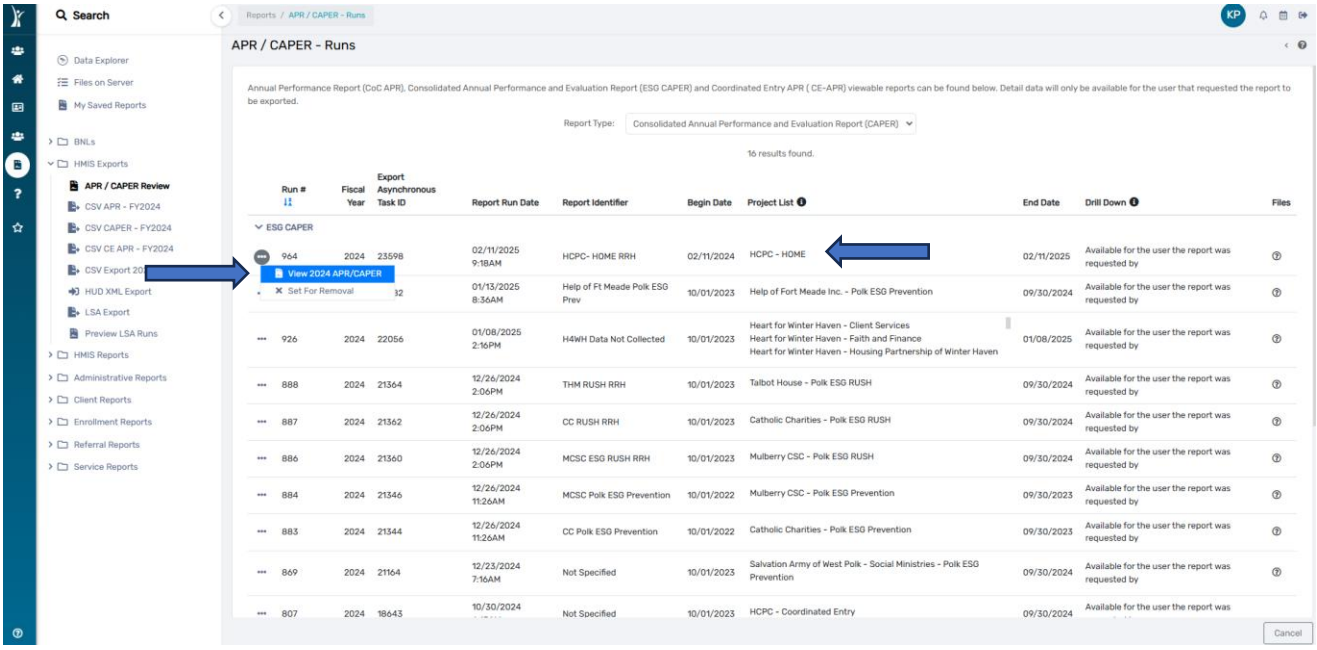


CAPER Reports can take 15-30 minutes to run.

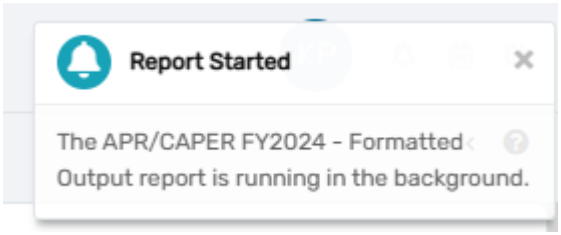
To review the CAPER please locate the “APR/CAPER Review” tab and filter the “Report Type” to the (CAPER) selection *or* (APR).



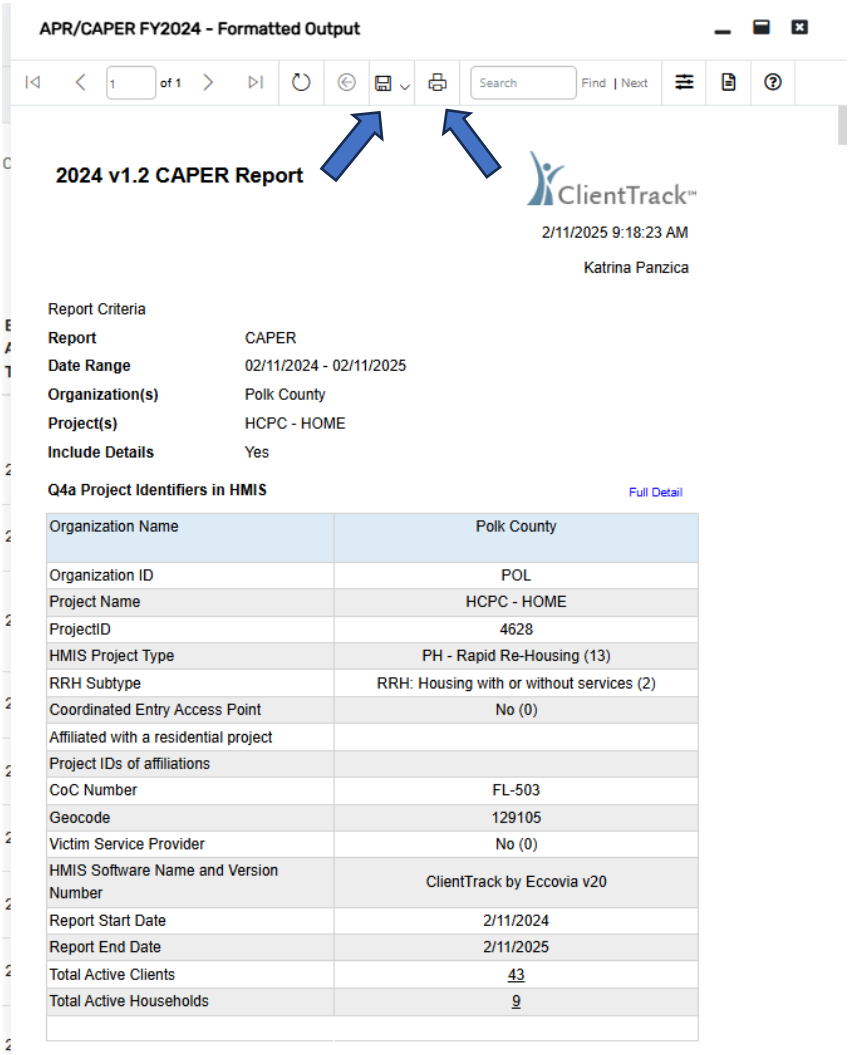
Next you will locate your Report Identifier. Select the 3 dots next to the desired report and select “View FY2024 Report”



The report will then run, and you will receive a notification on the top right hand of the screen stating the report is running and an updated notification when the report is ready to be viewed. This can take about 30 seconds to load.

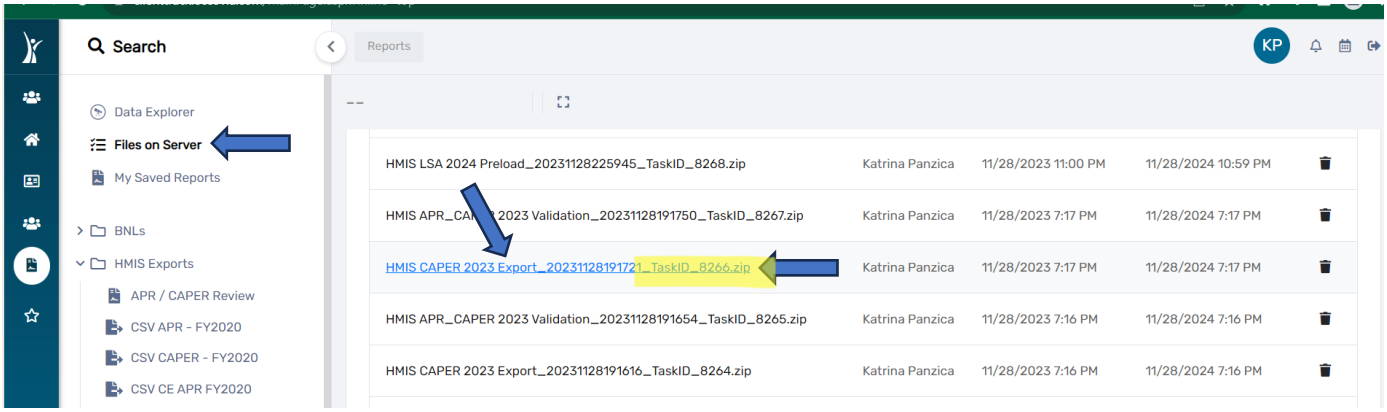


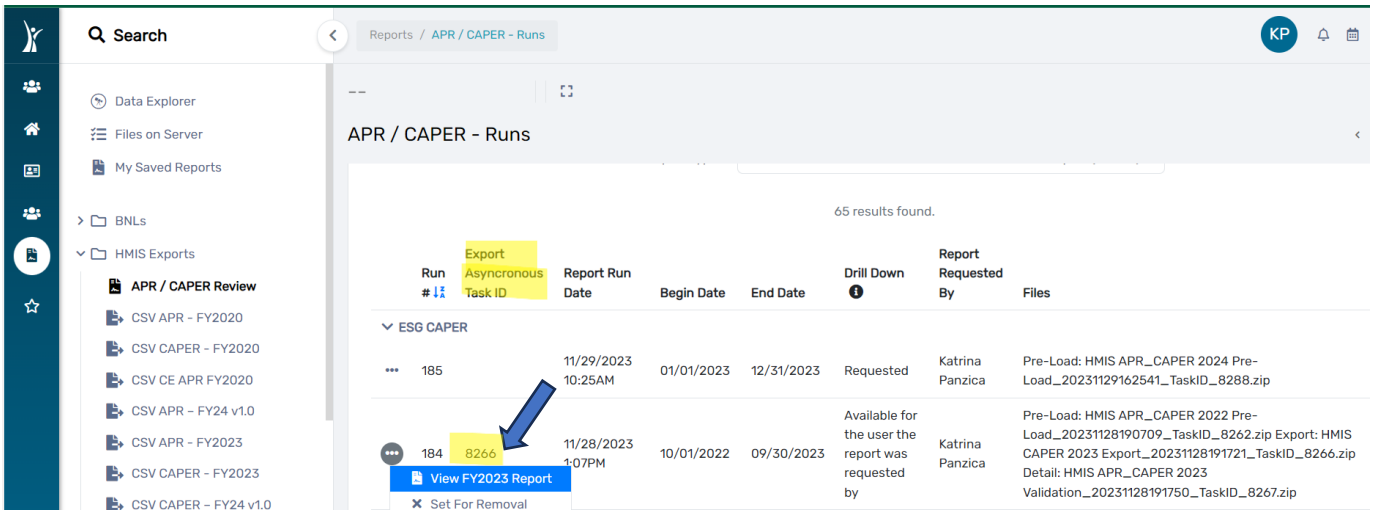
Finally, your CAPER/APR report will be displayed. From this screen you can choose to print your report, or download or simply review from the displayed screen.



If you are needing to Export a zip file version of this report. Please locate the “Files on Server” section. Simply select the desired export. It will automatically download to your files.

Please note that you will need to select and export that states in the title “Export” not “Preload” and you can always verify the Task ID # from the APR/CAPER Review section to verify you are selecting the correct export. For the example below the similar Task ID # is 8266.





You should now be able to successfully Run, Export, and View a CAPER Report.