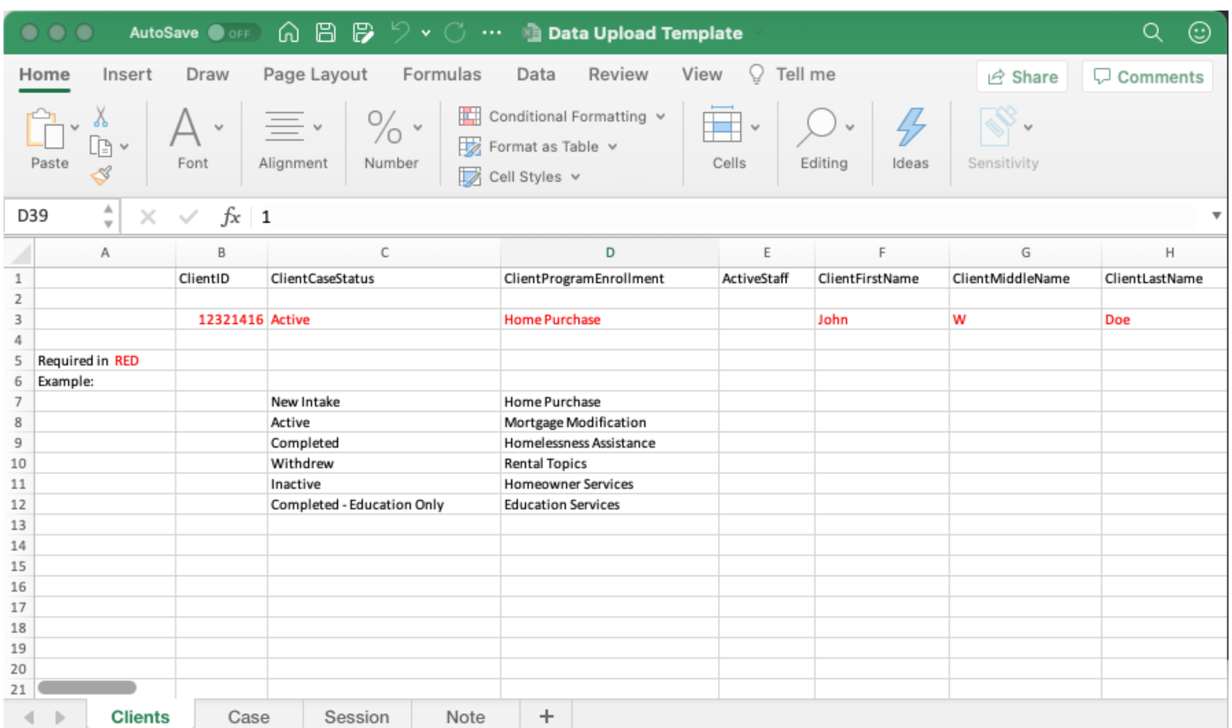
First steps to start transitioning your data to our template will be to download your data from your current CMS regardless of which CMS that is.

1. Identify All the data Columns you plan on bringing over to meet requirements
2. Copy the full columns from your data and paste into our template
3. Correct data points to match examples in our template by using find and replace

Ensure that you are downloading all of your data that is possible regardless if you plan on bringing it over. The more data you have the easier it will be to ensure that you are filling out the required fields that is on our template.

The bare minimum that you would need to bring over would be clients. Regardless of your prior CMS you should have a file that has all of the required information that we will go over.

You will notice once you open our template that the first tab is labeled Clients



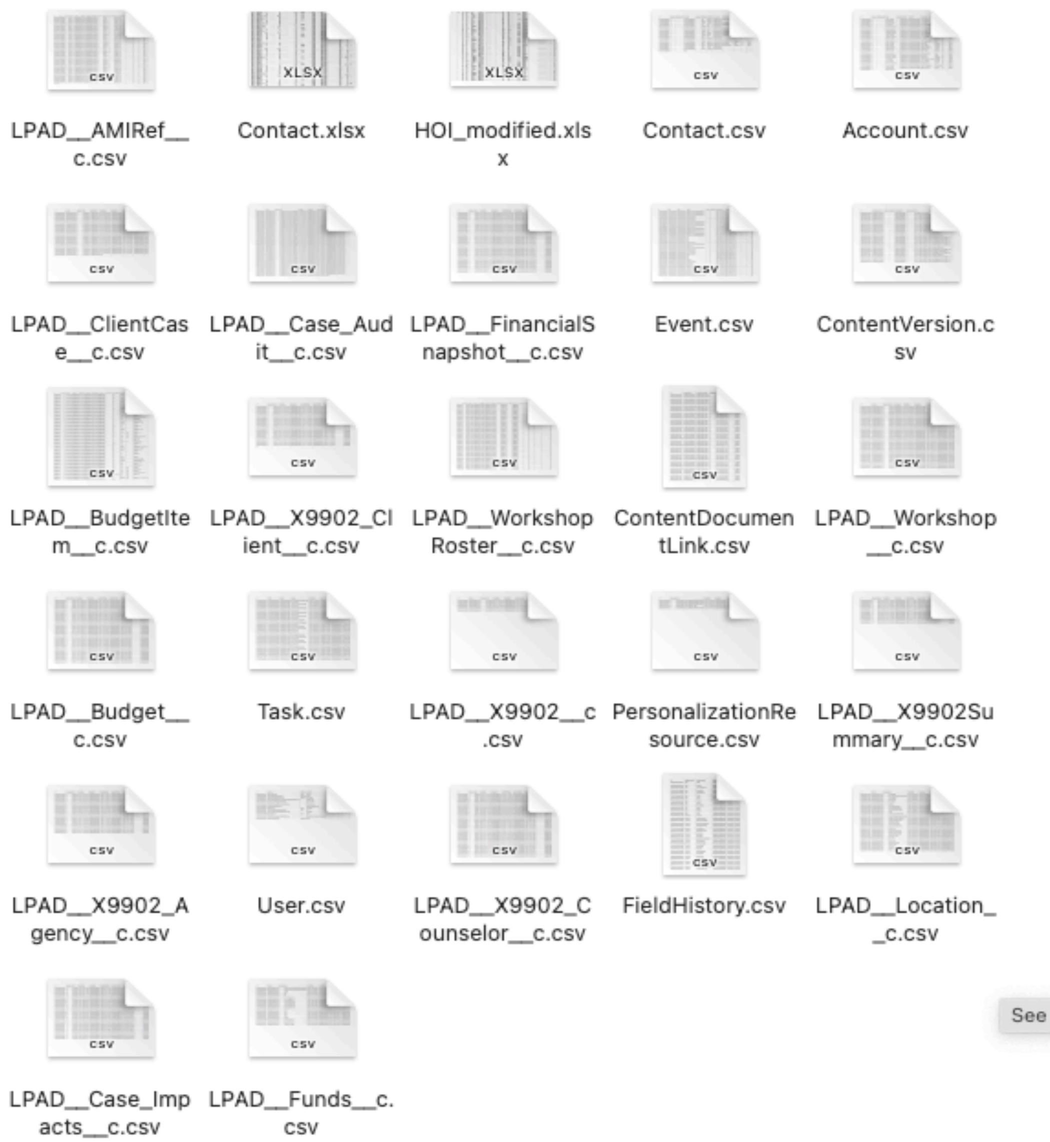
Any required field will be listed in red on our spreadsheet. These fields are required for reporting by HUD, you should easily have access to all of these fields for at least the clients tab.

IF YOU DO NOT USE A COLUMN, DO NOT DELETE IT

Once you have opened our template and looked through the data to see what you will need to transfer

Open up your data export folder. You could potentially have more files than what you will truly need.

But you will want to be sure to look through the files and find where all of your client data is, keeping in mind that all the data that you need for the clients, could potentially be in multiple files depending on the CMS and how they do their export.



In this data export, the client data is in the Contact.xlsx file. This may not always be the case though. So it will be important that you examine your data.

Once you have found the correct file with client data, you will need to start identifying the columns that you will need to bring over.

The first column will be the Client ID

Select the entire column by clicking on the letters that designate that column

	BG	BH	BI	BJ	BK	BL	BM
1	LPAD__AuthorizationFormReceived__c	LPAD__BestTimetoCall__c	LPAD__CitizenshipStatus__c	LPAD__ClientId__c	LPAD__ClientReferredby__c	LPAD__ColoniasResident__c	LPAD__CountyMS/
2			Citizen	158357150	N/A		
3				158357704	N/A		
4			Citizen	158359865	N/A		
5			Citizen	158413058	N/A		
6			Citizen	100066476	N/A		
7			Citizen	100066518	Agency Outreach		
8		Afternoon		100074228	Another Agency		
9			Citizen	100101356	N/A		
10			Citizen	100102575	N/A		
11			Citizen	100114816	Agency Outreach		
12				100307540	Another Agency		
13				100312889	Another Agency		
14				100317739	Another Agency		
15				100320509	Another Agency		
16				100324561	Another Agency		
17				100325510	Another Agency		
18				100455826	Another Agency		
19				100456590	Another Agency		
20				100567660	Another Agency		
21				100631118	Another Agency		
22				100634219	Another Agency		
23				100636170	Another Agency		
24			Citizen	100637856	N/A		
25				100648504	Another Agency		
26			Citizen	100654942	Another Agency		
27				100656208	Another Agency		
28				100999194	Another Agency		
29			Citizen	101073126	Another Agency		
30			Citizen	101325998	N/A		
31		Afternoon		101927361	Another Agency		
32			Citizen	102397352	N/A		
33			Citizen	10261610	N/A		
34			Citizen	102981593	N/A		
35			Citizen	102985717	N/A		
36			Citizen	103852063	N/A		
37			Citizen	10502163	N/A		
38			Citizen	105238524	N/A		
39			Citizen	10535577	N/A		
40			Citizen	107368266	Agency Outreach		
41			Citizen	10784596	HUD Outreach		
42			Citizen	10784917	HUD Outreach		
43			Citizen	108337502	N/A		
44			Citizen	109156328	N/A		
45			Citizen	110474792	N/A		
46			Citizen	11050895	N/A		
47			Citizen	110785831	N/A		
48			Citizen	111218403	N/A		
49			Citizen	111366085	N/A		
50			Citizen	111625324	N/A		
51			Citizen	11166322	Agency Outreach		

Contact +

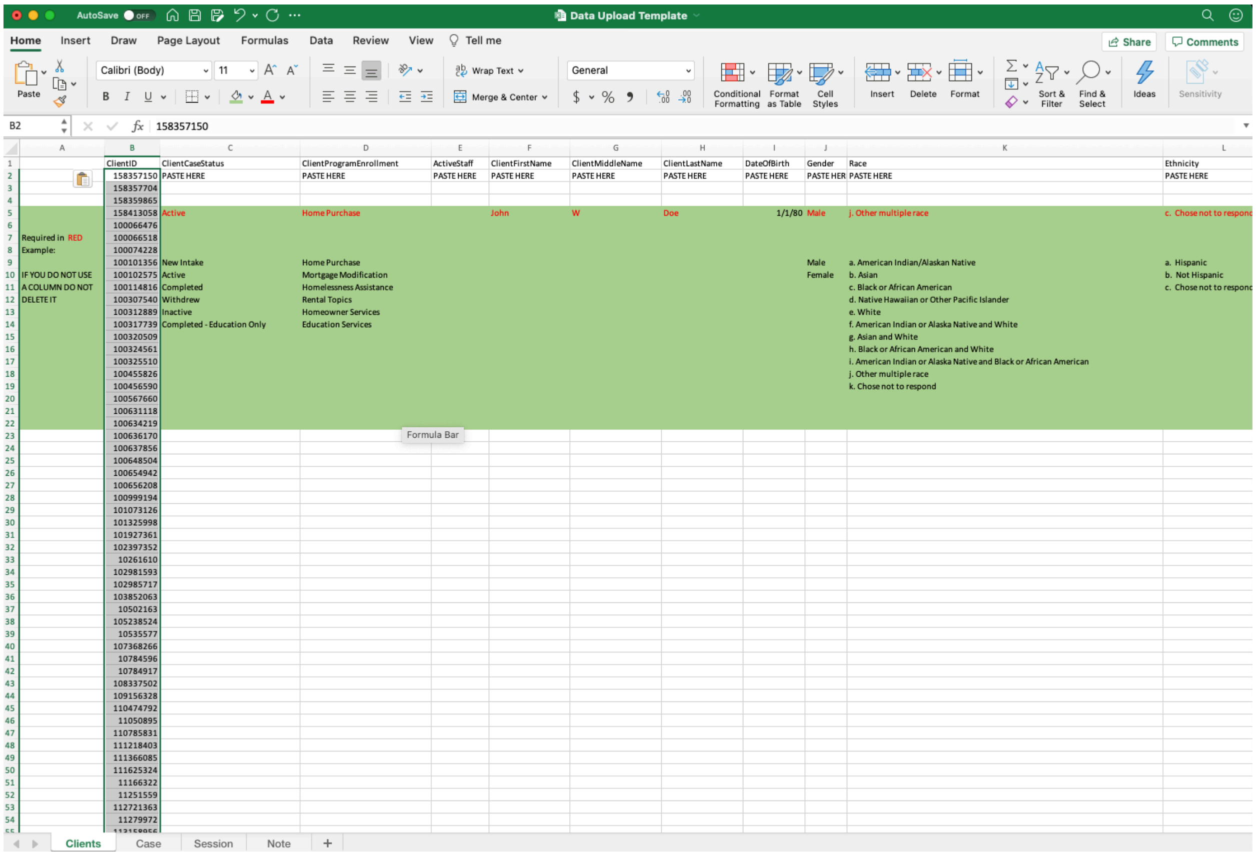
This will select all of the Client ID’s that are in your export.

Once selected and highlighted you can right click on the shaded region to copy the entire column.

Open up our data template and you will see we have examples of what the data looks like along the top of the template.

DO NOT DELETE THIS DATA YOU WILL NEED IT IN THE NEXT STEP.

Find the ClientID column in our template and paste your data in the cell labeled PASTE HERE



You will need to do this for each column that has red text for the example.

The red text marks fields that are REQUIRED FOR HUD SUBMISSION

You don't need to fill out every single column, but you will need to make sure you have transferred over all of the data that is required for a submission, otherwise you will have to go through and update each of these clients once they are in the system.

After you have transferred your columns, now is time for step three which will consist of matching up some of the data points to match what our options are.

If you remember, the examples that were at the top of our template when we started is what we will use Find & Select in excel to correct.

If you properly copied over your data, those examples will now be at the bottom of the template now.

There are potentially 12 columns that you will need to use the Find & Select feature of Excel for. However, 7 of those 12 columns are the only ones that are required, meaning you may only have 7 columns to correct.

Those columns will be

Required fields

- ClientCaseStatus
- ClientProgramEnrollment
- Race
- Ethnicity
- HouseholdIncomeBand
- RuralAreaStatus
- EnglishProficiencyLevel

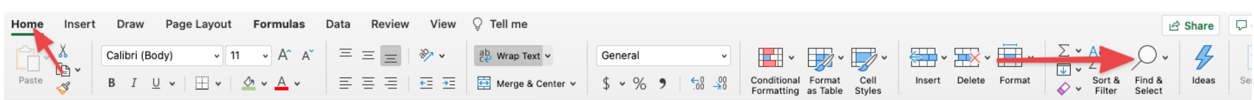
Not Required fields, but if they are filled you will need to correct these as well

- ImmigrationStatus
- MaritalStatus
- HouseholdType
- Education
- ReferalSource

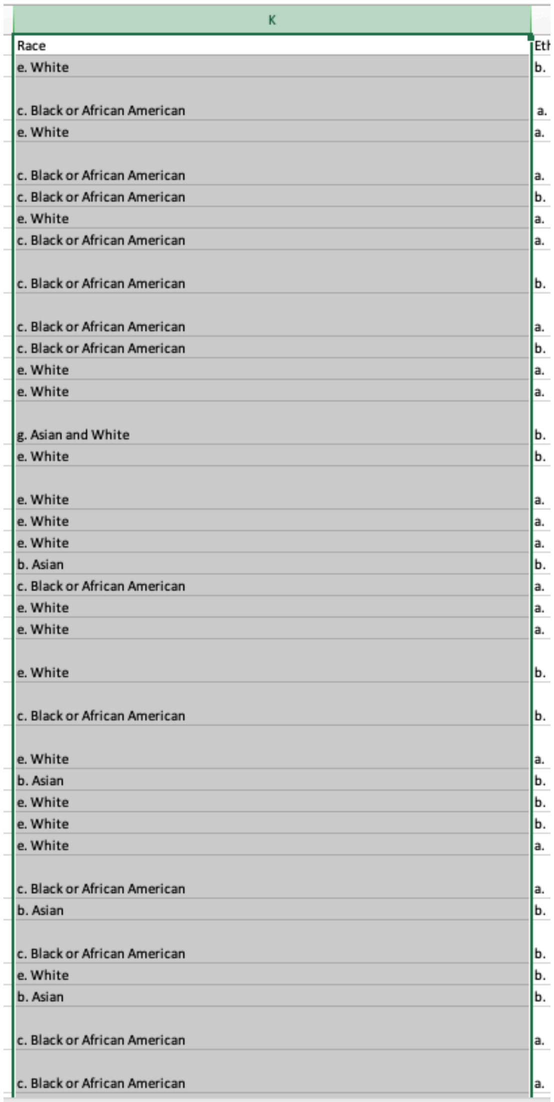
This is the example of what the data for the Race column should look like.

a. American Indian/Alaskan Native
b. Asian
c. Black or African American
d. Native Hawaiian or Other Pacific Islander
e. White
f. American Indian or Alaska Native and White
g. Asian and White
h. Black or African American and White
i. American Indian or Alaska Native and Black or African American
j. Other multiple race
k. Chose not to respond

To use find and select, Locate the button on your toolbar:

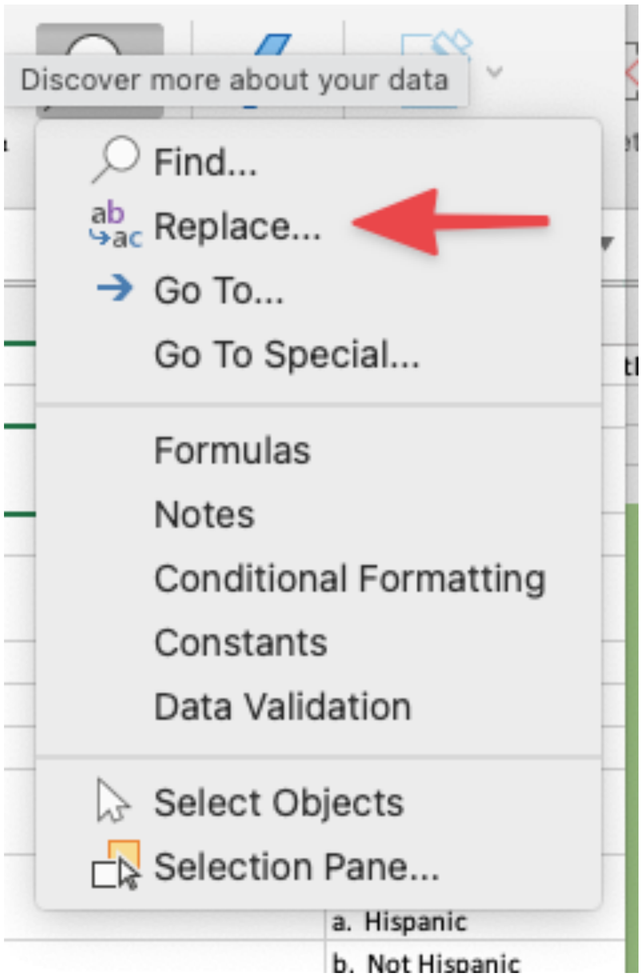


Select the whole column you plan on starting with.



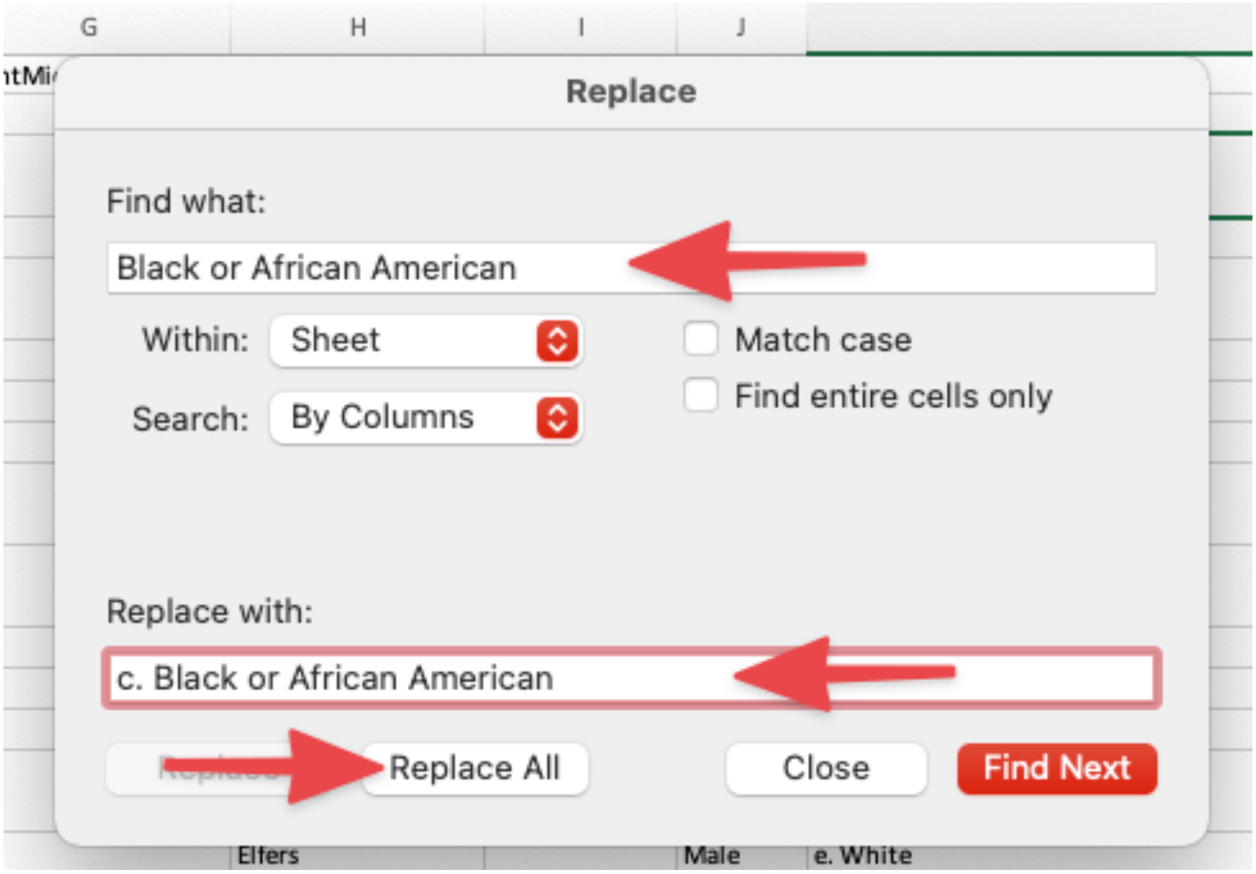
K	
Race	Eth
e. White	b.
c. Black or African American	a.
e. White	a.
c. Black or African American	a.
c. Black or African American	b.
e. White	a.
c. Black or African American	a.
c. Black or African American	b.
c. Black or African American	a.
c. Black or African American	b.
e. White	a.
e. White	a.
g. Asian and White	b.
e. White	b.
e. White	a.
e. White	a.
e. White	a.
b. Asian	b.
c. Black or African American	a.
e. White	a.
e. White	a.
e. White	b.
c. Black or African American	b.
e. White	a.
b. Asian	b.
e. White	b.
e. White	b.
e. White	a.
c. Black or African American	a.
b. Asian	b.
c. Black or African American	b.
e. White	b.
b. Asian	b.
c. Black or African American	a.
c. Black or African American	a.

Once you have selected a column click on the find & select button and choose Replace



Once you click replace this will be the window that you do ALL of your replacements from for THE COLUMN THAT YOU HAVE SELECTED.

In the example above, the column highlighted is the Race column, So that means for each race option, you would have to go through letters A-K from the example listed above and make sure that all of the options for race, match what is needed on the template.



Just add the first item you wish to replace at the top in the Find what: box,

And insert our proper selection into the replace with box.

Do this for each selection item for this column, then move on to the next.

Once you have completed this step on all of the columns that will need data corrected.

Your data should now line up properly with our template.