

Download TRACS Certification Query to Excel

1. First, choose the Certification Query option.
2. The TRACS Certification Query screen will display. You must enter the appropriate contract or project number.
3. Then, instead of reporting to the browser, choose to download your file.
4. Your download option will display. Click on the option to download the file. (if you have never downloaded files to a program before, you may be asked to choose a program. In this case, you need to download to Excel)
5. Once you have downloaded the file, it will look like a bunch of gobbley gook (I apologize for my use of highly technical terms). You need to format these files so you can read them.
6. Move your cursor over column A and click once so the entire column is highlighted.
7. Then move your cursor to the tool bar at the top of the screen.
8. Click on Data
9. Click on Text to Columns
10. A data formatting wizard will appear.
11. You are working with a delimited file. Choose that option and click next.
12. The files are separated by commas and semicolons. Choose those options and click next.
13. You do not need to change anything on the third screen. Click finish.
14. You're not quite done yet. Now you need to format the files.
15. Highlight the entire spreadsheet.
16. Go to the toolbar at the top of the page and click on format.
17. Click on columns and then autof format the column

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- 18. Click on format again
- 19. Click on rows and then autofformat the rows.
- 20. You will have more information than you need. The trick here is to delete all the superfluous information and keep what you need to compare to the voucher.

We only keep

Last Name	First Name	Head SSN	Unit Number	Effective Date	Cert Type	Action Code	Action Effect Date	Tracs Process Date	AP
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All other columns are deleted

Now here’s where the excel guru’s will love life.

- 21. Highlight the entire spreadsheet and sort by the Action Code field.
- 22. Delete all inactive residents (They will have move out (MO) or termination (TM) codes in this column)
- 23. Highlight the entire spreadsheet again and sort by the effective date.
- 24. Delete all inactive residents (any cert over 13 months old is inactive)
- 25. Also, delete any future certifications. These do not count.
- 26. The number of certs remaining should match the numerator (top number) of your compliance calculation.
- 27. If the remaining number of certs is greater than the numerator, than you may have households listed twice. (As with mid-cycle unit transfers or with interim certifications). You must identify these households and set them up to be counted only once.

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28. Now, compare the information to the information on your voucher.
29. Make sure you have the right household in each unit.
30. Make sure the last certification is recorded.
31. Make sure the AP is correct.
32. You should make note of any discrepancies and correct those as appropriate.

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