

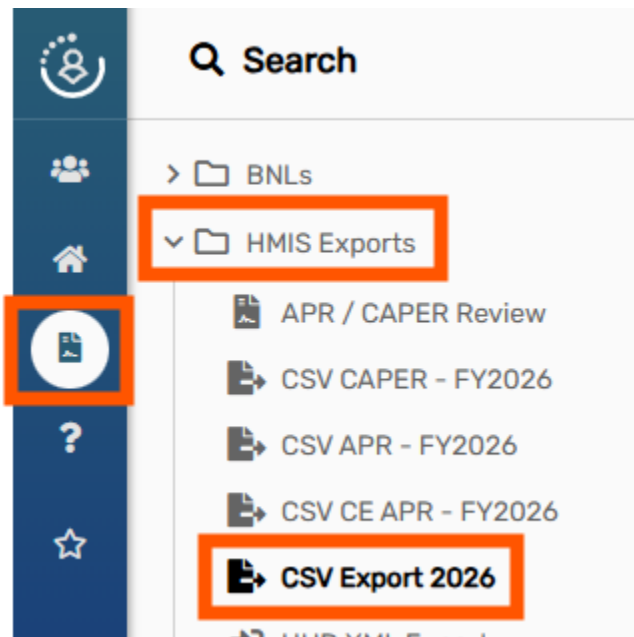
CSV Export 2026

Beginning in October 2025, ClientTrack has released a new CSV Export 2026. Users needing to generate a CSV Export for any purposes, should go directly to the CSV Export 2026 report launch form. The CSV Export is also utilized for the RHY and SSVF.

Users will be need to utilize the filters outlined below in order to correctly generate a CSV Export.

Generating a CSV Export

Users can access the CSV Export 2026 by navigating to the Reports Workspace. Clicking on HMIS Exports and then CSV Export 2026:



Applicable Launch Page Filters for CSV Reports

Saved Report Settings

Saved Report Settings can be set up by a user as they apply filters, choose projects or grants, and select the date ranges. Users can reuse these saved settings in the future to generate another report without needing to reapply the same parameters manually.

To use previously saved report settings, select the desired settings description. To save the current report settings, select Save Settings, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Source End Point: Select the appropriate option.

Saved Report Settings

To use previously saved report settings, select the desired settings description. To save the current report settings, select **Save Settings**, type a description of the settings in the **Save As** field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings:

-- SELECT --

Source End Point: *

-- SELECT --

-- SELECT --

Data Warehouse

EVA

HDX

RHY Export

SSVF Reporting

Date Range

The Date Range filter can be used to filter the enrollments that were active at some point during the date range selected.

There are several pre-defined date ranges to choose from in the "Predefined Date Range" dropdown menu.

Date Range

Indicate the time period for this export. Only enrollments that were active at some point within the date range you select will be included. However, all data associated with those enrollments, up to the end date will be included. The start date of the grant (or earlier) should be used for the Export Start Date.

Predefined Date Range:

Since This Date, Last Year

Enrollments active between: *

07/31/2025

and

07/31/2026

Export Date: *

07/31/2026

Continuum(s) of Care (CoCs)

Select **Dallas City & County/Irving CoC** as the Continuum of Care Code (CoC):

Continuum(s) of Care (CoCs)

Indicate which CoCs should be included in the report by selecting each CoC separately. Note: By default, this list only shows CoCs selected on the Implementation Information form in setup data. Check the 'Show All CoCs' filter to include all CoCs in the filter list if you need to select additional CoCs.

CoC(s):

Texas



✓ Dallas City & County/Irving CoC

☐

Show all CoCs

Organization

The Organization filter is a required field before generating an export.

Choose your organization by selecting the name of your organization:

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the ✓ icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s): *

* Housing Forward Lead Agency 2

*** Housing Forward Training CAS Org

✓*** Housing Forward Training Org

*** Housing Forward Training Sensitive Org

After-School Education



Program(s)

The Program(s) filter may be used to restrict the export records to only include applicable records within the program(s) selected. This field is not required, and users may select any and all applicable projects.

Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the  icon to select all.

Project Type:

Emergency Shelter - Entry Exit

Emergency Shelter - Night-by-Night

Transitional Housing

PH - Permanent Supportive Housing (disability required for entry)



HMIS Projects Only:

☒

Program(s):

☒ Filter by Program(s)

Selected:
HUD: ESG - Homeless Prevention

TRAIN - HUD: CoC - Homelessness Prevention

 TRAIN - HUD: ESG - Homeless Prevention

TRAIN - HUD: ESG-RUSH - Homelessness Prevention

TRAIN - VA: SSVF - Homelessness Prevention

Other



Exclude Deleted Records

This filter will exclude any deleted records from the export. Deleted records may include, but are not limited to deleted programs, deleted enrollments, and deleted client records. This filter is set to default as 'Exclude Deleted Records'. If a user would like to include the deleted records, they may uncheck this filter and generate the export.

It is highly recommended to continue to exclude deleted records when generating a CSV Export.

Exclude deleted records

Un-check this box to include deleted records.

Exclude Deleted Records:

☒

Additional Filters

Additional filters

Included Assessment Types:

☐

Limit After Care to 180 days from Exit:

☐

Limit services to within the Enrollment Entry and Exit dates:

☐

Included Assessment Types

This filter is not required, but when selected, allows users to filter the records included in the CSV Export to only records associated with the specific Assessment Types selected. These Assessment Types include Entry, During Program, Enrollment/Update, Annual, Exit, Post Exit/Follow Up and Other.

Limit After Care to 180 days from Exit

This filter is not required, but when selected, allows users to filter the records to exclude any After Care assessments collected outside of the 180 day timeframe defined by HUD.

This filter is not required, but users generating a CSV Export for a RHY Export or a YHDP Supplemental Report should select this filter.

Limit Services to within the Enrollment Entry and Exit Dates

This filter allows users to filter the export to exclude any services that are provided to a client outside of the Enrollment Entry and Exit dates.

This filter is not required, but users generating a CSV Export for an official HUD purpose, including the SSVF Export, RHY Export, YHDP Supplemental Report, should select this filter.

Hash PII

This filter will apply the HUD defined Hash algorithm to the Personally Identified Information (PII) included in the CSV Export.

This filter is not required, but users generating a CSV Export for an upload to Eva, a RHY Export, a YHDP Supplemental Report will need to select this filter to generate a Hashed CSV Export.

Hash PII

Hash PII:

☐