

The Annual Performance Report (APR) and the Consolidated Annual Performance and Evaluation Report (CAPER) are annual reporting tools used by U.S. Department of Housing and Urban Development (HUD) program recipients to track, measure, and evaluate project and system performance. [1, 2]

You can find official documentation, programming specs, and submission portals through the **HUD Exchange CoC APR/ESG CAPER Guidance**.

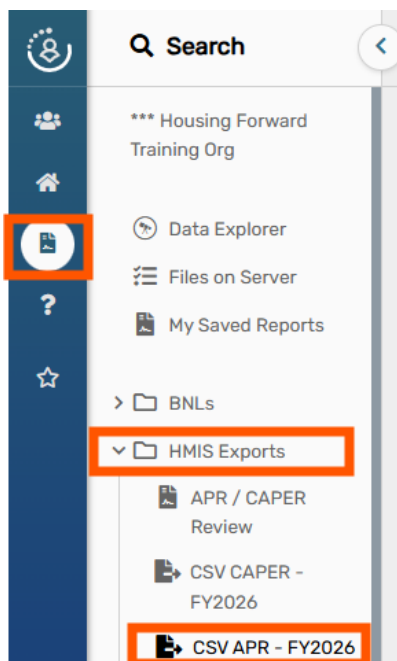
APR & CAPER

Running the Reports

1. Log in to ClientTrack and navigate to your Reports workspace.

In the menu, click HMIS Exports, then choose CSV – APR FY[20XX] or CSV – CAPER FY[20XX].

*Note: In the naming convention of the report above, [20XX] represents the most recently published HUD reporting standards i.e. 2026. HUD updates this report format regularly. Currently, the **FY 2026** format is being used.*



2. Complete the Date Range that you'd like to run the report for. Use the dropdown to select a range or type a custom date range into the boxes provided.

CSV APR - FY2026

Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Date Range List: Since This Date, Last Year

Begin Date: 07/28/2025 to 07/28/2026

3. Confirm that the organization selected is your organization.

Organization

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. Only enrollments created by the Organizations selected here will be included in the export.*

Organization: *

- * Housing Forward Lead Agency 2
- *** Housing Forward Training CAS Org
-  *** Housing Forward Training Org
- *** Housing Forward Training Sensitive Org
- After9to5Educate

4. Filter the report by program and select the program you are running the report for.
For submitting the report to Sage, only 1 program should be selected.

Project

The list displays projects that belong to the organizations you selected above. Indicate which projects should be included in the report by selecting each project type and/or project separately or click the  icon to select all. Unchecking the HMIS Projects Only checkbox will allow the APR to be run on any project in the system. If running an APR for a non-HMIS project, please be aware that there may be missing information where information wasn't collected.

Project Type: ☐ Filter by Project Type

HMIS Projects Only: ☒

Project(s): * ☒ Filter by Project(s)

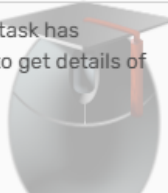
- TRAIN - HUD: ESG - ES (oper &/or ess) (US)
- TRAIN - HUD: ESG - Homeless Prevention
- TRAIN - HUD: ESG - Rapid Re-Housing
- TRAIN - HUD: ESG-RUSH - Emergency Shelter Entry Exit
- TRAIN - HUD: ESG-RUSH - Emergency Shelter Night-by-night

5. If you need client-level data, under Validation File, check the box next to “Generate Validation File”. This will queue a report in the Files on Server that contains client-level data.

Validation File

Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will not affect the running of or delay the main export. **THIS MUST** be selected to get details of numbers in the APR and the report used to review the export

Generate Validation File: ☒



6. Click Run Export. Note that if you chose to create a validation file, ClientTrack will ask you to either password protect the document or accept full responsibility for the safety of the file if you uncheck the encryption box. Choose one of these options, then click Done.

Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export: ☐

Include Header Row in CSV File(s): ☒

Always Quote CSV Values(s): ☐

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

☒ I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

Done

7. You will receive a notification that ClientTrack will be processing your report soon. Click OK.

sb.ct.caseworthy.net says

Your export has been queued and will be processed at the next available time.

OK

8. You will be taken the Files on Server page. You can also access this page any time through the menu. Your report will display here when it is ready. While you are waiting on the report to run, you can view its status in the Task List by clicking "Click to view".

Files on Server

Displayed below is a list of the files available for you to download. Files with an expiration date will be automatically removed on the date specified. Click a file to download it. To remove the file, click the delete link. Once deleted, the file will no longer be available for download by any user and will not be available for processing if used in an import.

[View the status of export or import tasks.](#)

Created	Expires	
HMIS APR 2026 Export_20260611161551_TaskID_104532.zip 6/11/2026 4:16 PM	Lisa Heise 6/11/2027 4:15 PM	
HMIS APR_CAPER 2026 Pre-Load 2_20260611160537_TaskID_104531.zip 6/11/2026 4:05 PM	Lisa Heise 6/11/2027 4:05 PM	
HMIS APR_CAPER 2026 Pre-Load_20260611155524_TaskID_104530.zip 6/11/2026 3:55 PM	Lisa Heise 6/11/2027 3:55 PM	
HMIS CSV 2026 Export_20260416195919_TaskID_102071.zip 4/16/2026 7:59 PM	Lisa Heise 4/16/2027 7:59 PM	

First, you will see a pre-load file. Then you will see the export file once the pre-load file has run. If you chose to run a validation file, you would see that as well.

Asynchronous Tasks

[+ New Scheduled Task](#)

Show only my tasks: ☒

Refreshing in 20 seconds
[Refresh Now](#)

7 results found.

Task Name	Desired Start Time	End Time	Status	TaskID
*** HMIS APR/CAPER 2026 Validation	07/28/2026 12:00PM		Not Started	106653
*** HMIS APR 2026 Export	07/28/2026 12:00PM		Not Started	106652
*** HMIS APR/CAPER 2026 Pre-Load 2	07/28/2026 11:50AM	07/28/2026 11:58AM	Completed Successfully	106651
*** Run CSV Export - HMIS APR/CAPER 2026 Pre-Load	07/28/2026 11:46AM	07/28/2026 11:48AM	Completed Successfully	106650

9. When the report has run, refresh the Files on Server page and select the file(s) you wish to download. The export file is imported to Sage. The validation file is what can be used to get client-level data for internal reporting purposes.

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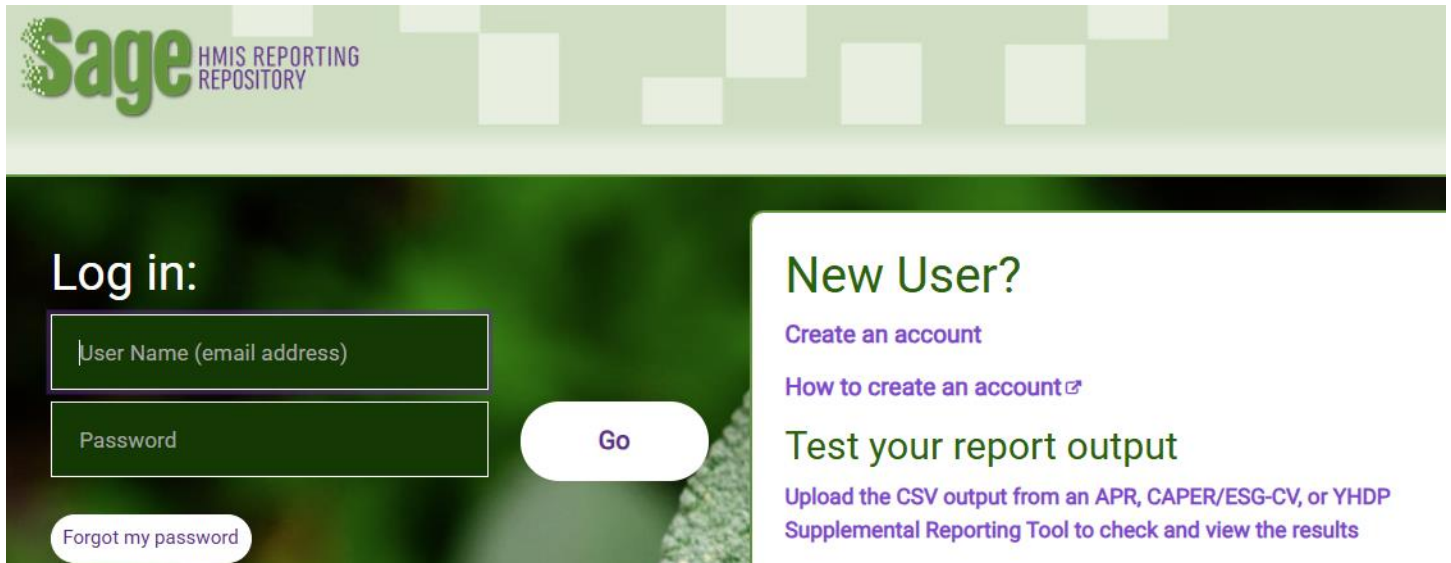
[View the status of export or import tasks.](#)

Created	Expires	
HMIS APR_CAPER 2026 Validation_20260728170947_TaskID_106653.zip 7/28/2026 5:09 PM	Lisa Heise 7/28/2027 5:09 PM	
HMIS APR 2026 Export_20260728170850_TaskID_106652.zip 7/28/2026 5:09 PM	Lisa Heise 7/28/2027 5:08 PM	
HMIS APR_CAPER 2026 Pre-Load 2_20260728165823_TaskID_106651.zip 7/28/2026 4:58 PM	Lisa Heise 7/28/2027 4:58 PM	
HMIS APR_CAPER 2026 Pre-Load_20260728164810_TaskID_106650.zip 7/28/2026 4:48 PM	Lisa Heise 7/28/2027 4:48 PM	

Uploading to Sage

In your web browser, go to <https://www.sagehmis.info/>

You can use this page to test your reports and get a formatted PDF version of the report. Or you can log in to submit the report if that is part of your responsibilities. Sage will prompt you to choose either APR or CAPER depending on which report you need to upload.



The screenshot shows the Sage HMIS Reporting Repository login page. The header features the Sage logo and the text 'HMIS REPORTING REPOSITORY'. The main content area is divided into two sections. On the left, under the heading 'Log in:', there are two input fields: 'User Name (email address)' and 'Password'. To the right of these fields is a 'Go' button. Below the password field is a link that says 'Forgot my password'. On the right side of the page, under the heading 'New User?', there are two links: 'Create an account' and 'How to create an account'. Below these links is a section titled 'Test your report output' with a description: 'Upload the CSV output from an APR, CAPER/ESG-CV, or YHDP Supplemental Reporting Tool to check and view the results'.

Differences Between APR & CAPER

These reports are run almost identically. In fact, in ClientTrack it can be hard to tell them apart at times. The main difference in the APR and CAPER is that the CAPER only displays clients with a Date of Engagement and Current Living Situation recorded.