

How To Guide: Running a CSV Export in HMIS or DVCT

What is a CSV?

A CSV (Comma-Separated Values) file is a plain text file used to store tabular data. Each line represents a row, and commas separate the values. CSVs can be easily imported into tools like Excel, databases, or HUD reporting tools

What is an HMIS CSV Export?

An HMIS CSV Export is a formatted file designed for uploading HUD tools such as Stella P, EVA, APR, and CAPER for data quality and performance analysis.

Running the CSV Export in HMIS or DVCT

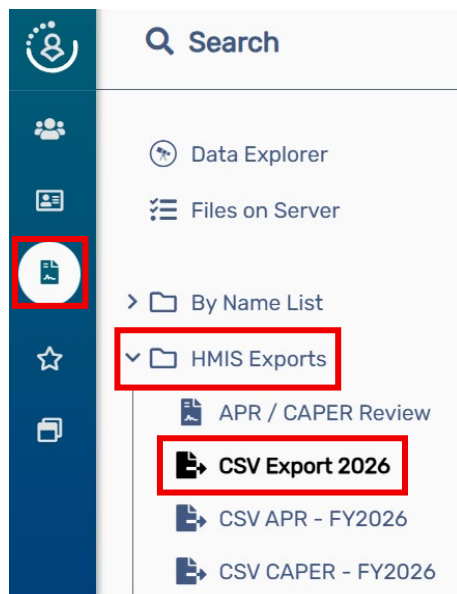
Running this export is no different than running a CAPER or APR. However, there are a few things to keep in mind.

1. Log in

Log into your HMIS or DVCT account.

2. Navigate to the Export

- Open the *Reports* workspace (left blue ribbon).
- Select **HMIS Exports**.
- Choose **CSV Export 2026**.



3. (Optional) Save Your Settings

If you want to reuse the same setup:

- Click **Saved Report Settings**.
- Enter a name under **Save As***.
- Choose **IHCDA** under **Source End Point***

HMIS Export - FY2026



Export full HMIS data with the HMIS CSV Export that aligned with the FY2026 HMIS CSV specifications found here (<https://www.hudexchange.info/resource/3824/hmis-data-dictionary/>). The data included will fit the filters that are selected. The Source type is not used to filter the data, it is only used as part of the export file.

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: Save Settings ▾

Save As *:

Source End Point: * IHCDA ▾ ⓘ

4. Select Required Parameters

- **Source Type***: **Continuum-Operated HMIS**
- **Enrollments active between:** Choose your date range
 - **Export Date** = the **start** date of your selected range
- **Continuum(s) of Care:** Select **Indiana Balance of State**
- Select the organization(s) to include in your report.

Source Type

Identify where the export is being generated from. This populates fields in the Export.csv. This is not a filter

Source Type: * Continuum-Operated HMIS ▾

1. Select the date range for the “Enrollments active between:” fields. The “Export Date” should be the start date of your date range as shown below.

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:

Previous Fiscal Year

Enrollments active between: *

10/01/2024

and

09/30/2025

Export Date: *

10/01/2024

12:38 PM

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):

Indiana

✓ Indiana Balance of State

☐ Show all CoCs

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): *

A Better Way

Albion Fellows Bacon Center

Alternatives, Inc

Beyond the Violence

Counsel on Domestic Abuse



5. Optional Filters

You may filter by project type, program name, or grant—but these are not required. Additional filters can remain unchecked unless needed.

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)

Street Outreach

HMIS Projects Only:

☒

Program(s):

☐ Filter by Program(s)

Grant(s)

The list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the  icon to select all.

Grant(s): ☐ Filter by Grant(s)

Include PIT Count Information

Checking this box will include PIT Count Information for a particular date in the PITCount field of the Project.csv. Please select the date to use for the PITCount Data.

Note: This will not include a calculated count of enrolled clients. This information will be generated from the configured PIT Count Information on Project Setup.

Include PIT Count Information: ☐

Exclude deleted records

Un-check this box to include deleted records.

Exclude Deleted Records: ☒

Additional filters

Include enrollments with a missing EnrollmentCoC: ☐ ⓘ

Included Assessment Types: ☐ Filter by Included Assessment Types

Limit After Care to 180 days from Exit: ☐

Limit services to within the Enrollment Entry and Exit dates: ☐

6. Hash PII

Ensure **Hash PII** is checked.

This encrypts personally identifiable information within the export.

7. Run the Export

Click **Run Export**. The export will begin running in the background.

Hash PII

Hash PII: ☐

Run Export

Cancel

8. An **Export Encryption** window will appear. Uncheck **Encrypt Export** to run the report without encryption. This prevents the need to create a password to open the export later.

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: ☒

Password: *

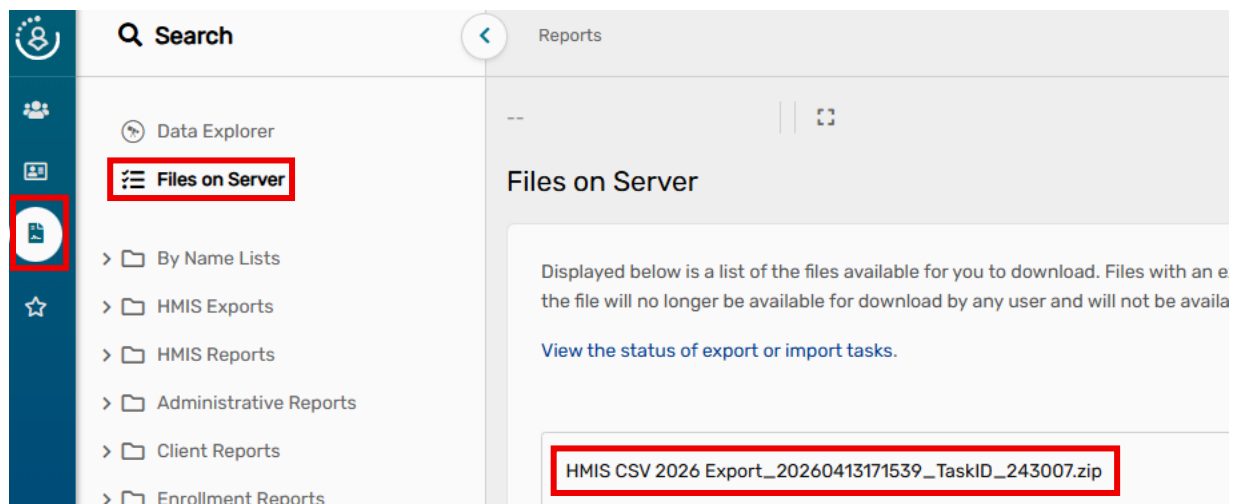
Confirm Password: *

Include Header Row in CSV File(s): ☒

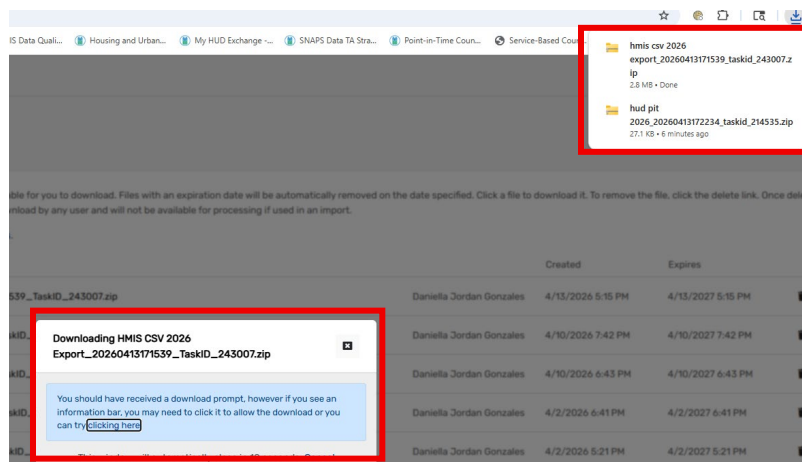
Always Quote CSV Values(s): ☐

9. Select the checkbox confirming that you accept responsibility for protecting the unencrypted file. **Files generated through this process should not be shared or emailed**, as they may contain personally identifiable information (PII). A pop-up will then appear stating, “Your export has been queued and will be processed at the next available time.”

10. The export may take **20–60 minutes or more** to complete. To check its status, open the **Files on Server** tab. When the export is ready, it will appear similar to the example shown in the guide. Click the link to download the file to your computer.



11. After clicking the link, a pop-up window will appear indicating that a ZIP file is being downloaded. Once the download is complete, you will see a notification in the upper-right corner of your screen. Double-click the notification to open the ZIP folder, which contains **24 CSV files**. Each file contains different data points such as enrollment, clients, income, and more.



At this point, you have successfully run and downloaded a CSV Export. There are many ways to analyze these datasets. If you are unsure where to begin, refer to the [EVA–Quick Start Guide Upload HMIS Data](#) to explore and understand your data without needing advanced expertise.

You can also access more resources to take full advantage of the EVA tool [HERE](#).