Export Form Data

Last Modified on 07/30/2025 12:55 pm EDT

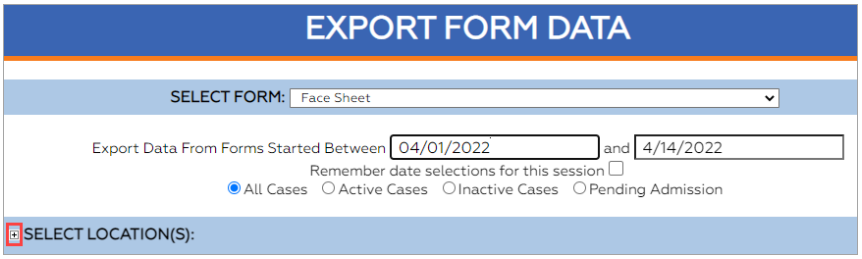
Path: Main Menu > Reports Menu > Export Form Data

About

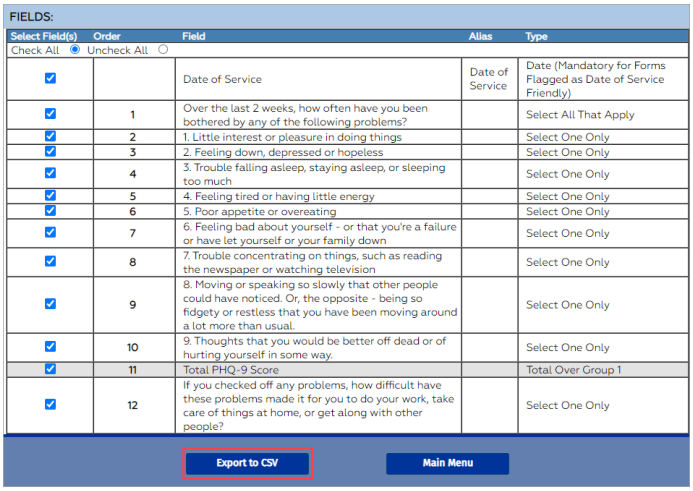
The Export Form Data tool can be used to export certain data fields for completed Forms in a specific date range.

Export Form Data

1. Navigate to Export Form Data by following the path above.
2. Click the **Select Form** drop-down and select a Form.
3. Change the **Export Data From Forms Started Between** fields, if necessary. By default, today's date is populated.
4. *(Optional)* Select the **Remember date selections for this session** checkbox if you are going to be exporting data for the same date range for multiple Forms without leaving the page.
5. The **All Cases** radio button is selected by default. Select the **Active Cases**, **Inactive Cases**, or **Pending Admission** radio buttons if necessary.
6. Click **+** to expand Select Location(s) and select the **checkboxes** of the Location(s) you want to pull data for.



7. *(Optional)* In the Form Properties section, if the Form you selected has this field displayed, select the **Export Location Data** checkbox if you want the address information exported for the Location(s) you selected in step 6.
8. In the Fields section, select individual field **checkboxes** or select the **Check All** radio button to select all checkboxes.
9. Click the **Export to CSV** button. The data is downloaded into a CSV file.



Warning: The Export Form Data tool does not provide users good feedback when running, and it is best to run it in small date increments. We found that it can take 30-60 seconds (sometimes longer) to return data. The reason for this is the amount of data and complexity of the work the tool goes through when returning results.

Here is some guidance when running the tool

- It's best to run the tool off hours so that the complex export process (query) does not interact with users working
- Fliter a month or two month increments. You can increase this, and it will take longer to return. So some experimentation can help
- Only click the button to Export CSV once. Clicking it more than once will cause it to run multiple times and take longer to return.
- Give it time. It should eventually return.