HMIS - How to Generate the Service Transactions Report

1. From the HMIS **Home Page Dashboard**, click on the **Reports** module.

    NOTE: If you do not see the Reports module on your screen, submit a Help Desk Request so the HMIS team may research your user access and modify if necessary.
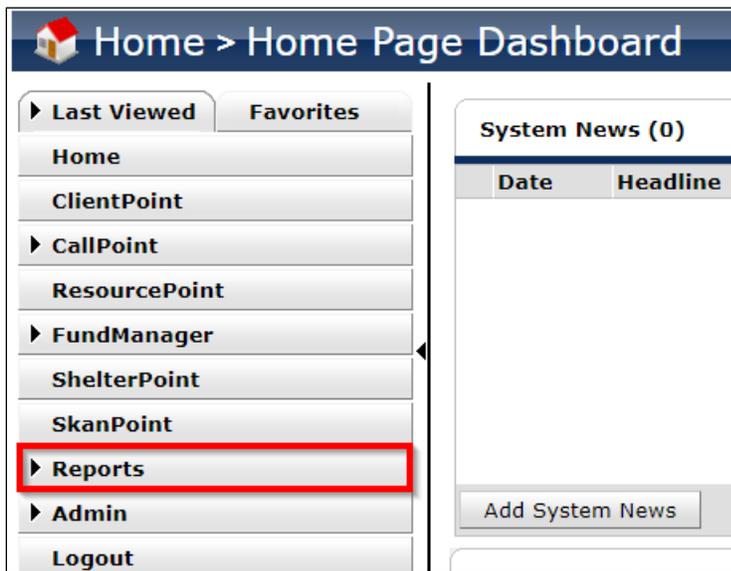
2. The screen displays the **Report Dashboard**. Click the **Service Transaction** section.
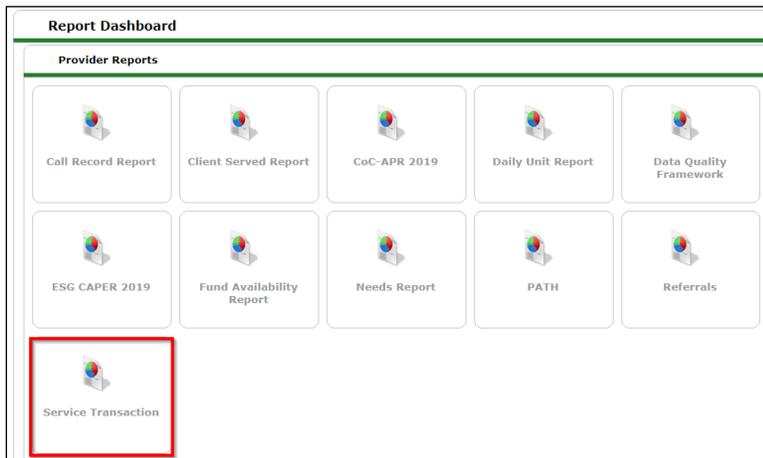
3. The **Report Options** tab displays. Click the **Provider** drop-down and select the program that the services were provided through.

Select the program that the services were provided through

4. Click the **Provider Search Type** drop-down and select **The Provider AND its subordinates**.

5. Beside the **Services** field, place a checkmark next to the appropriate service type(s). Select all that apply.

Place a checkmark next the appropriate service type(s)

6. Optional: Click the **Choose Service Code** button to select a service code.

7. Enter dates in the **Need Date Range** and **Service Provided Date Range** fields.

   NOTES:
   - To view all service transactions, do not enter dates.
   - To view all service transactions starting on a specific date, enter information in the first date range field.

8. Optional: Confirm that the **Need Outcome** drop-down displays as **ALL**.

9. Click the **Build Report** button. The report displays.

Service Transaction						
Need Date	**Name**	**Need Type**	**Created By**	**Referred To**	**Service**	**Service Provider**
09/05/2020		Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
09/05/2020		Water Service Payment Assistance	Fort Lawn Community Center		Water Service Payment Assistance	Fort Lawn Community Center
09/05/2020		Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
09/05/2020		Gas Service Payment Assistance	Fort Lawn Community Center		Gas Service Payment Assistance	Fort Lawn Community Center
09/24/2020		Emergency Food	MACH-Fort Lawn-ESG-HP		Emergency Food	MACH-Fort Lawn-ESG-HP
10/01/2020		Job Finding Assistance	MACH-Fort Lawn-ESG-HP		Job Finding Assistance	MACH-Fort Lawn-ESG-HP
11/03/2020		Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
11/09/2020		Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
11/10/2020		Gas Service Payment Assistance	MACH-Fort Lawn COVID-ESG-HP		Gas Service Payment Assistance	MACH-Fort Lawn COVID-ESG-HP

10. To export the report into an Excel document, click the **Download Report** button at the bottom of the **Report Options** tab.

11. The **Download Service Transaction Report** pop-up displays. Click the **Download** button.
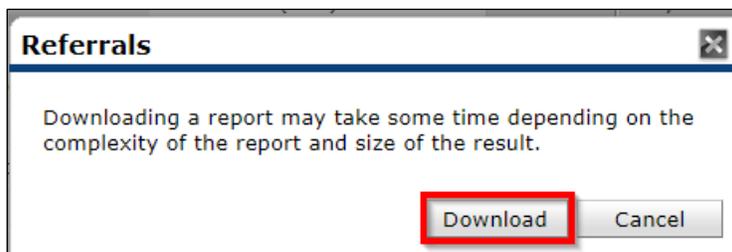
12. A zip drive folder displays at the bottom of the screen. Click the **Open file** hyperlink.

13. File explorer opens. Double-click the Excel document.
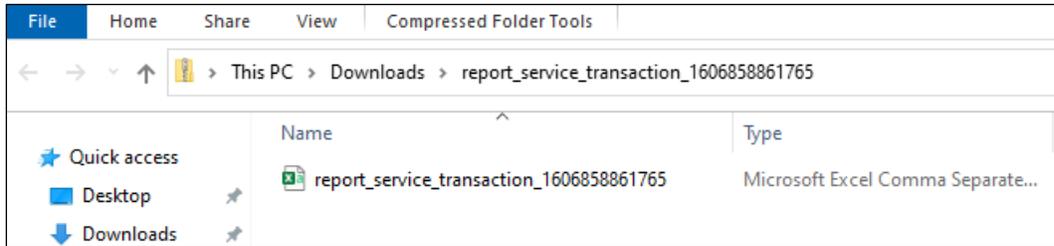
14. The Excel document displays.