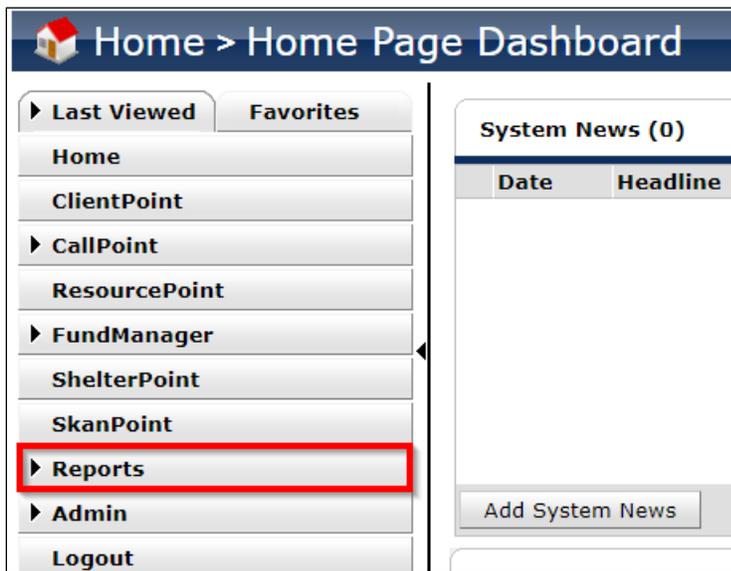


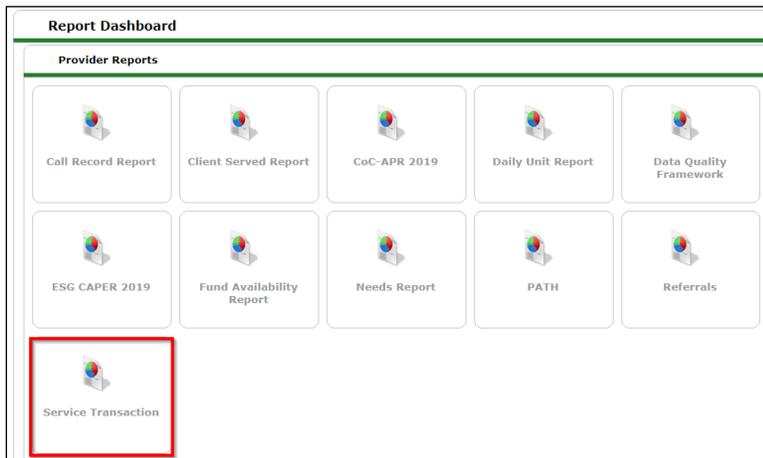
# HMIS - How to Generate the Service Transactions Report

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.





- The **Report Options** tab displays. Click the **Provider** drop-down and select the program that the services were provided through.

**Report Options**

**Provider \*** -Select- ▼

**Provider Search Type \*** The selected provider AND its subordinates ▼

**Services \***

- Needs Entered by my provider
- Services Provided by my provider (Non-shelter stays)
- Shelter Stays provided by my provider
- Needs Referred to my provider
- Referrals Made by my provider

Service Code: Choose Service Code Clear

Need Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Service Provided Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

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

**Report Options**

**Provider \*** -Select- ▼

**Provider Search Type \*** The selected provider ONLY ▼

**Services \***

- Needs Entered by my provider
- Services Provided by my provider (Non-shelter stays)
- Shelter Stays provided by my provider
- Needs Referred to my provider
- Referrals Made by my provider

Service Code: Choose Service Code Clear

Need Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Service Provided Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Need Outcome: -All- ▼

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

**Report Options**

**Provider \*** -Select- ▼

**Provider Search Type \*** The selected provider ONLY ▼

**Services \***

- Needs Entered by my provider
- Services Provided by my provider (Non-shelter stays)
- Shelter Stays provided by my provider
- Needs Referred to my provider
- Referrals Made by my provider

Service Code: Choose Service Code Clear

Need Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Service Provided Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Need Outcome: -All- ▼

- 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	<a href="#">View Details</a>	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
09/05/2020	<a href="#">View Details</a>	Water Service Payment Assistance	Fort Lawn Community Center		Water Service Payment Assistance	Fort Lawn Community Center
09/05/2020	<a href="#">View Details</a>	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
09/05/2020	<a href="#">View Details</a>	Gas Service Payment Assistance	Fort Lawn Community Center		Gas Service Payment Assistance	Fort Lawn Community Center
09/24/2020	<a href="#">View Details</a>	Emergency Food	MACH-Fort Lawn-ESG-HP		Emergency Food	MACH-Fort Lawn-ESG-HP
10/01/2020	<a href="#">View Details</a>	Job Finding Assistance	MACH-Fort Lawn-ESG-HP		Job Finding Assistance	MACH-Fort Lawn-ESG-HP
11/03/2020	<a href="#">View Details</a>	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
11/09/2020	<a href="#">View Details</a>	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center
11/10/2020	<a href="#">View Details</a>	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.

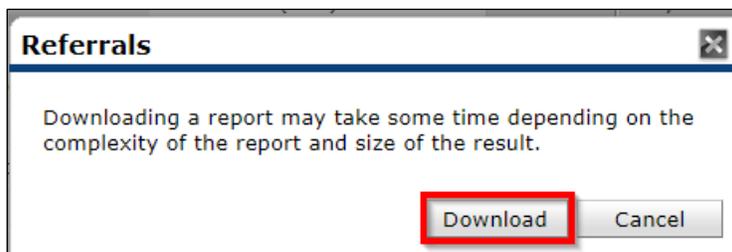
Service Code

Need Date Range

Service Provided Date Range

Need Outcome

11. The **Download Service Transaction Report** pop-up displays. Click the **Download** button.

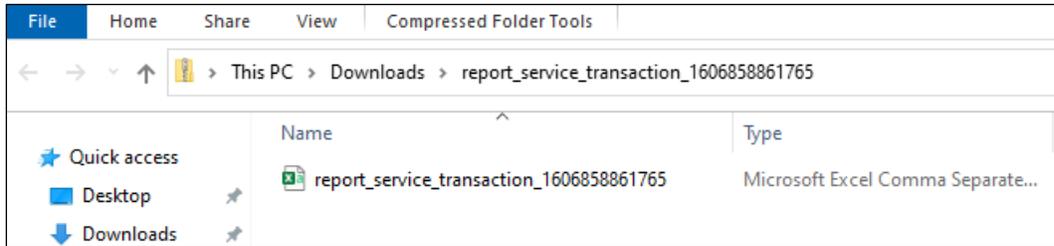




12. A zip drive folder displays at the bottom of the screen. Click the **Open file** hyperlink.



13. File explorer opens. Double-click the Excel document.



14. The Excel document displays.

	A	B	C	D	E	F	G	H	I
1	Need Date	Name	Need Type	Created By	Referred	Service	Service Provider		
2	9/5/2020	(S)	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn Community Center		
3	9/5/2020	(S)	Water Service Payme	Fort Lawn		Water Service Paym	Fort Lawn Community Center		
4	9/5/2020	(S)	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn Community Center		
5	9/5/2020	(S)	Gas Service Payment	Fort Lawn		Gas Service Paymen	Fort Lawn Community Center		
6	9/24/2020	(S)	Emergency Food	MACH-For		Emergency Food	MACH-Fort Lawn-ESG-HP		
7	10/1/2020	(S)	Job Finding Assistan	MACH-For		Job Finding Assistan	MACH-Fort Lawn-ESG-HP		
8	11/3/2020	(S)	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn Community Center		
9	11/9/2020	(S)	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn Community Center		
10	11/10/2020	(S)	Gas Service Payment	MACH-For		Gas Service Paymen	MACH-Fort Lawn COVID-ESG-HP		
11	11/17/2020	(S)	Case/Care Managem	MACH-For		Case/Care Managem	MACH-Fort Lawn-ESG-HP		
12	11/17/2020	(S)	Fresh Food	Fort Lawn		Fresh Food	Fort Lawn Community Center		
13	11/19/2020	(S)	Fresh Food	Fort Lawn		Fresh Food	Fort Lawn Community Center		