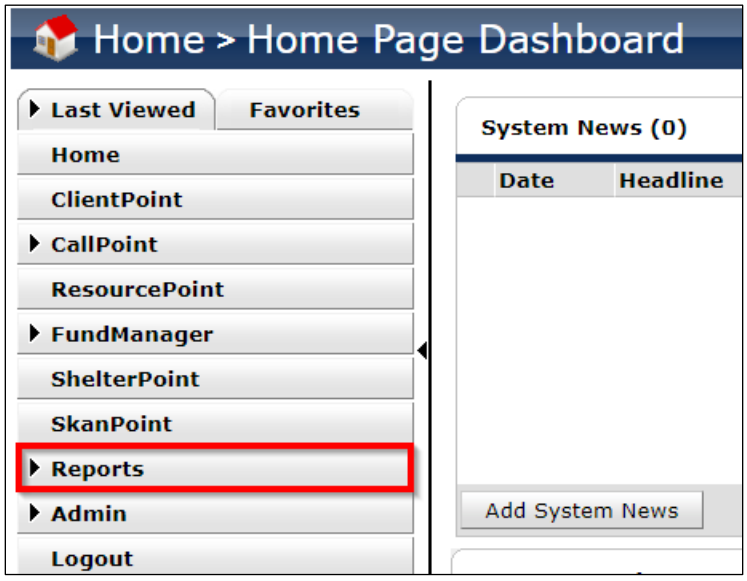
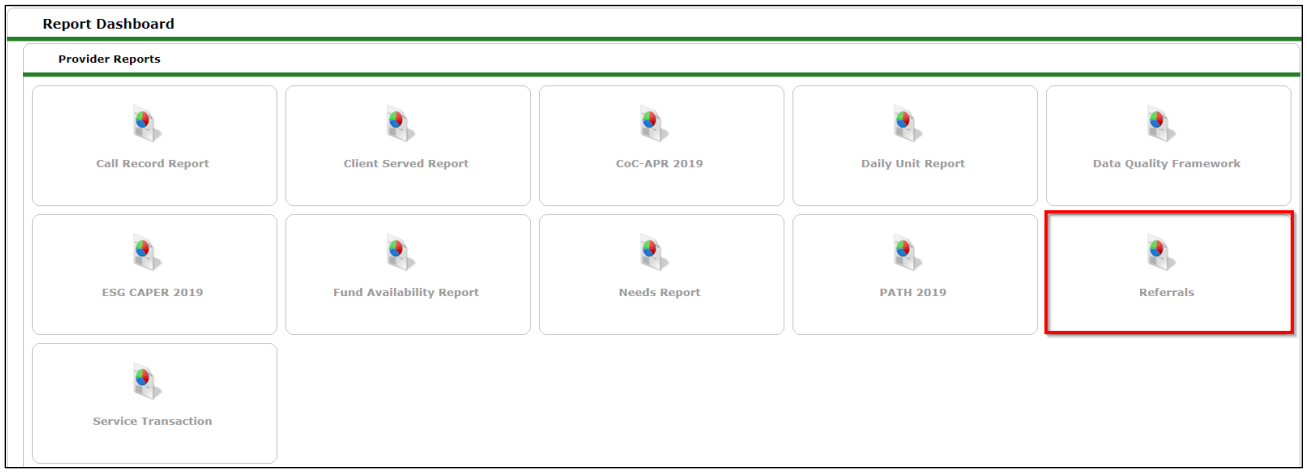
HMIS - How to Generate the Referrals Report

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

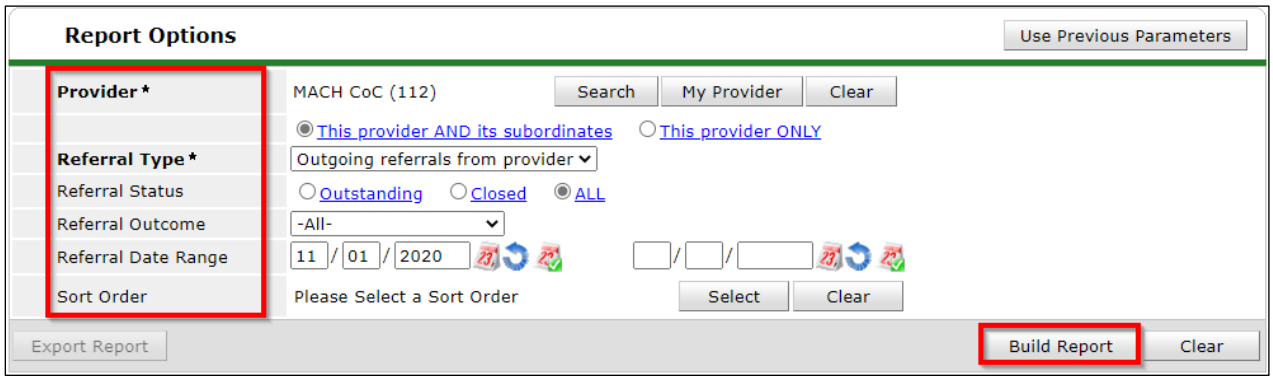
   NOTE: If you do not see the Reports module on your screen, submit a Help Desk Request so the HMIS team may research your user access and modify if necessary.



2. The screen displays the **Report Dashboard**. Click the **Referrals** section.



3. The Report Options tab displays. Confirm that the **Provider** field displays your Level 2 provider.



4. Click on the **This provider AND its subordinates** radio button.

5. Click the **Referral Type** drop-down.
   - **Incoming Referrals** - Allows users to view a list of clients that other agencies have referred to your agency.
   - **Outgoing Referrals** - Allows users to view a list of clients and agencies that your agency has referred clients to.

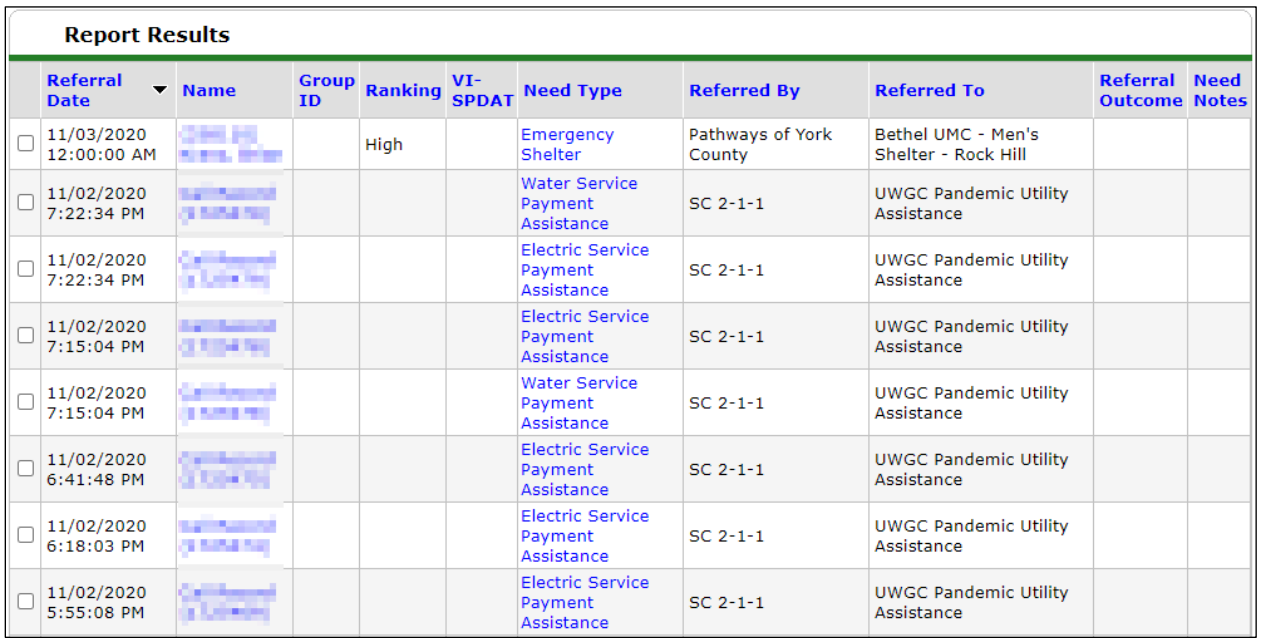
6. **Referral Status** - Select if you'd like the list to display **Outstanding** referrals, **Closed** referrals, or **ALL** referrals

7. Confirm that the **Referral Outcome** drop-down displays as **ALL**.

8. Enter the **Referral Date Range**

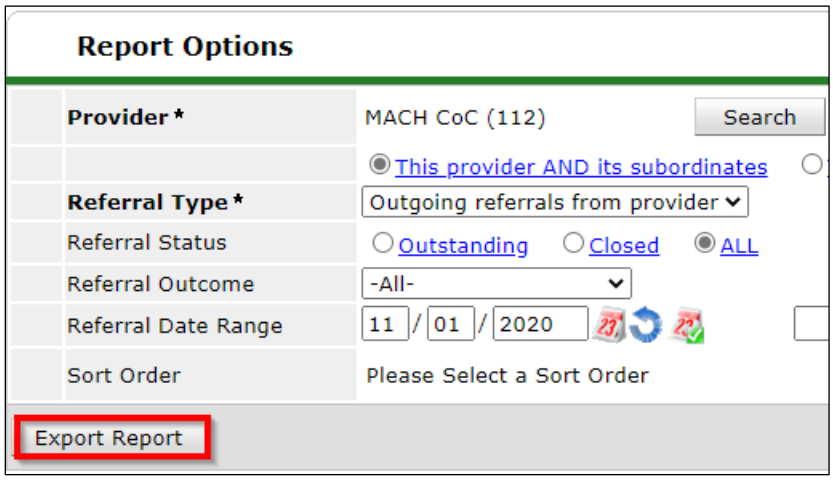
   NOTES:
   - To view all referrals made, do not enter dates.
   - To view all referrals starting on a specific date, enter information in the first date range field.

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

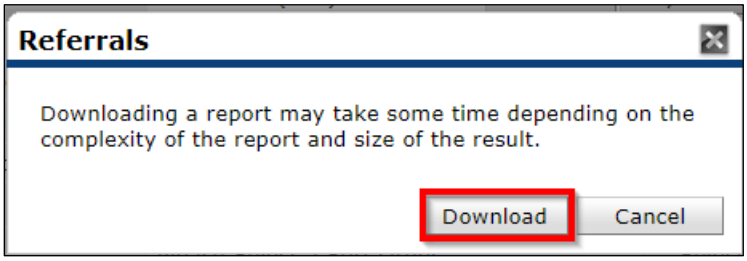


Referral Date	Name	Group ID	Ranking	VI-SPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
11/03/2020 12:00:00 AM			High		Emergency Shelter	Pathways of York County	Bethel UMC - Men's Shelter - Rock Hill		
11/02/2020 7:22:34 PM					Water Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 7:22:34 PM					Electric Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 7:15:04 PM					Electric Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 7:15:04 PM					Water Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 6:41:48 PM					Electric Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 6:18:03 PM					Electric Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		
11/02/2020 5:55:08 PM					Electric Service Payment Assistance	SC 2-1-1	UWGC Pandemic Utility Assistance		

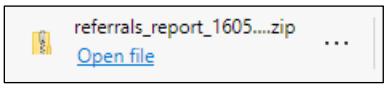
10. To export the report into an Excel document, click the **Export Report** button at the bottom of the **Report Options** tab.



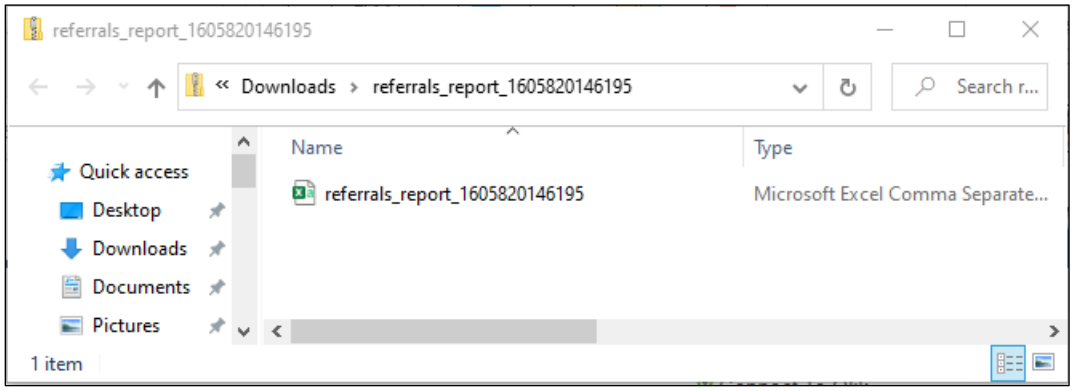
11. The **Referrals** pop-up displays. Click the **Download** button.



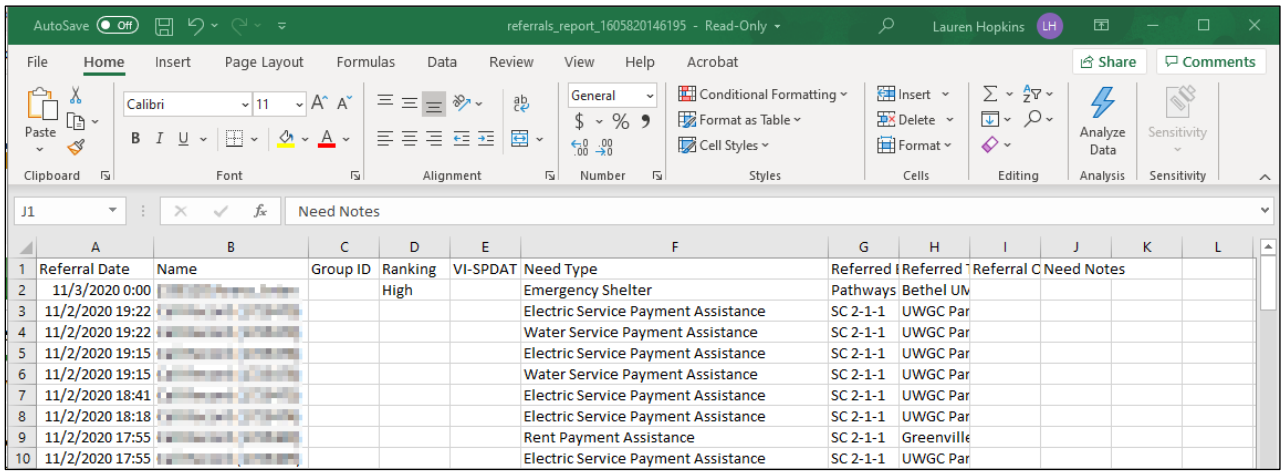
12. A zip drive folder displays at the bottom of the screen. Click the **Open file** hyperlink.



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



14. The Excel document displays.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Referral Date	Name	Group ID	Ranking	VI-SPDAT	Need Type	Referred I	Referred T	Referral C	Need Notes		
2	11/3/2020 0:00			High		Emergency Shelter	Pathways	Bethel UM				
3	11/2/2020 19:22					Electric Service Payment Assistance	SC 2-1-1	UWGC Par				
4	11/2/2020 19:22					Water Service Payment Assistance	SC 2-1-1	UWGC Par				
5	11/2/2020 19:15					Electric Service Payment Assistance	SC 2-1-1	UWGC Par				
6	11/2/2020 19:15					Water Service Payment Assistance	SC 2-1-1	UWGC Par				
7	11/2/2020 18:41					Electric Service Payment Assistance	SC 2-1-1	UWGC Par				
8	11/2/2020 18:18					Electric Service Payment Assistance	SC 2-1-1	UWGC Par				
9	11/2/2020 17:55					Rent Payment Assistance	SC 2-1-1	Greenville				
10	11/2/2020 17:55					Electric Service Payment Assistance	SC 2-1-1	UWGC Par				