

## 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.

📌 Home > Home Page Dashboard						
Last Viewed Favorites	System News (0)					
ClientPoint	Date	Headline				
▶ CallPoint						
ResourcePoint						
▶ FundManager						
ShelterPoint						
SkanPoint						
▶ Reports						
▶ Admin	Add Syste	em News				
Logout		_				

2. The screen displays the Report Dashboard. Click the Service Transaction section.

Provider Reports							
Call Record Report	Client Served Report	CoC-APR 2019	Daily Unit Report	Data Quality Framework			
ESG CAPER 2019	Fund Availability Report	Needs Report	Path	Referrals			
Service Transaction							



3. 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  Select the program that
Services *	Needs Entered by my provider         the services were
	Services Provided by my provider (Non-shelter stays) provided through
	Shelter Stays provided by my provider
	<u>Needs Referred to my provider</u>
	Referrals Made by my provider
Service Code	Choose Service Code Clear
Need Date Range	/  /   週� 惑   /  /   週 • 夏
Service Provided Date Range	

4. 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					
	<u>Needs Referred to my provider</u>					
	<u>Referrals Made by my provider</u>					
Service Code	Choose Service Code Clear					
Need Date Range	· · · · · · · · · · · · · · · · · · ·					
Service Provided Date Range	/  /   週う 惑   /  /    週う 惑					
Need Outcome	-All-					

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

Report Options	
Provider * Provider Search Type *	-Select-       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- 🗸

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 N		Need Type	Created By	<b>Referred To</b>	Service	Service Provider			
09/05/2020	(namer) manage annang	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center			
09/05/2020	саналар талан. Каналар	Water Service Payment         Fort Lawn Community         Water Service           Assistance         Center         Payment Assistance		Fort Lawn Community Center					
09/05/2020	Contract Names,	Electric Service Payment Fort Lawn Community Electric Service Payment Assistance Payment Assistance		Fort Lawn Community Center					
09/05/2020	CHORE Roman. Annalogie	Gas Service Payment Assistance	Fort Lawn Community Center		Gas Service Payment Assistance	Fort Lawn Community Center			
09/24/2020	Calcel, Per.	Emergency Food	MACH-Fort Lawn-ESG- HP	SG- Emergency Food		MACH-Fort Lawn- ESG-HP			
10/01/2020	(namen) may the	Job Finding Assistance MACH-Fort Lawn-ESG- HP Job Finding Assistance		MACH-Fort Lawn- ESG-HP					
11/03/2020	generating trajects Territy	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center			
11/09/2020	Sector Parts	Electric Service Payment Assistance	Fort Lawn Community Center		Electric Service Payment Assistance	Fort Lawn Community Center			
11/10/2020	OCTOR Not.	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	Ch	oose Service	e Code	Clear	
Need Date Range	09 /	01 / 2020	27, 💙	🧞 12 / 01	/ 2020 🧖 🔿
Service Provided Date Range	09/	01 / 2020	23	2012/01	/ 2020 🧖 🔿
Need Outcome	-All-	~		_	
		Build Report		Downlo	ad Results

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

Referrals	×
Downloading a report may take some time depen complexity of the report and size of the result.	ding on the
Download	Cancel



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.

	AutoSave 💽	<b>ヨ</b> 日り	• CI • •	report_	service_tran	saction_160	5858970633 - Read-Onl	y <del>-</del>		🔎 Search
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B	28 *	: _ ×	√ Jx							
	Α		В	С	D	E	F	G	н	1
1	Need Date	Name		Need Type	Created B	Referred '	Service	Service Pro	ovider	
2	9/5/2020	Colorest Colorest	en Origina	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn	Communi	ty Center
3	9/5/2020	CONTRACTOR -	ALC: NOT THE OWNER.	Water Service Payme	Fort Lawn		Water Service Paym	Fort Lawn	Communi	ty Center
4	9/5/2020	Constant and the second	And the second second	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn	Communi	ty Center
5	9/5/2020	Concerning States	and the state of	Gas Service Payment	Fort Lawn		Gas Service Paymen	Fort Lawn	Communi	ty Center
6	9/24/2020	CONTRACTOR OF	distant in the	Emergency Food	MACH-For		Emergency Food	MACH-For	t Lawn-ES	G-HP
7	10/1/2020	COLUMN TWO	1 inter	Job Finding Assistant	MACH-For		Job Finding Assistan	MACH-For	t Lawn-ES	G-HP
8	11/3/2020	Contraction of the	en, Terles	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn	Communi	ty Center
9	11/9/2020	Section 2.	and all states in the	Electric Service Paym	Fort Lawn		Electric Service Payr	Fort Lawn	Communi	ty Center
10	11/10/2020	Internet for	1000	Gas Service Payment	MACH-For		Gas Service Paymen	MACH-For	t Lawn CO	VID-ESG-HP
11	11/17/2020	and the second	ing Shiring	Case/Care Managem	MACH-For		Case/Care Managen	MACH-For	t Lawn-ES	G-HP
12	11/17/2020	Constraints of	in Children	Fresh Food	Fort Lawn		Fresh Food	Fort Lawn	Communi	ty Center
13	11/19/2020		and a second second	Fresh Food	Fort Lawn		Fresh Food	Fort Lawn	Communi	ty Center