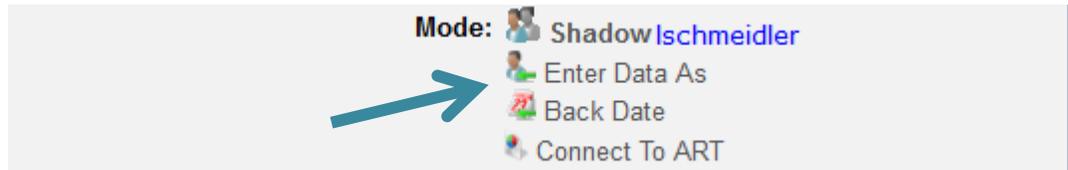


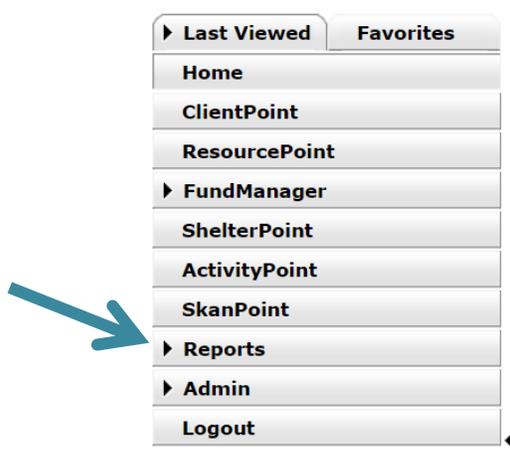
Referrals Dashboard Report

Before running the report, make sure that you are not using default EDA mode. This means that there are no blue words after the Enter Data As mode in the upper right-hand corner.

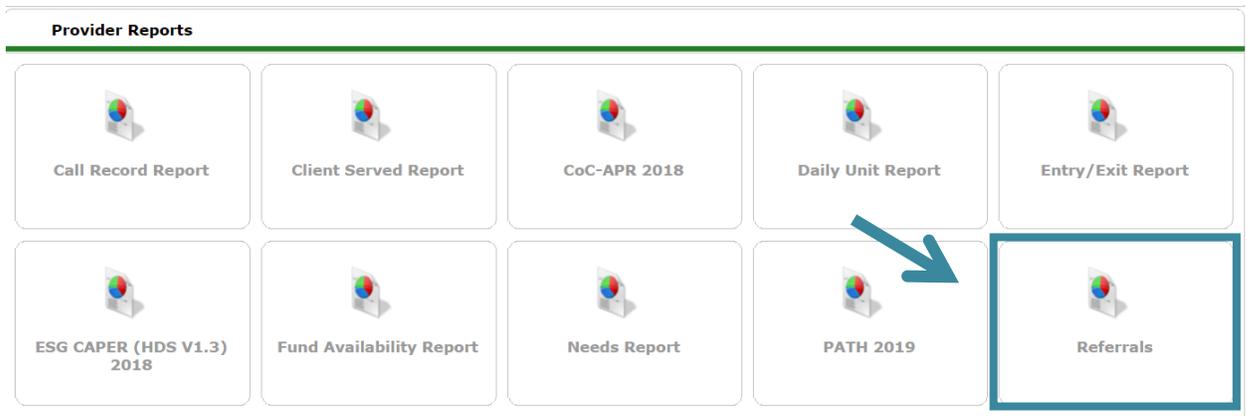
1. Confirm *Enter Data As* for the project you want to check incoming referrals for.



2. Click *Reports*.



3. Click *Referrals* report.



A. Complete report prompts

- i. Ensure *Provider* is correct based on EDA mode.
*if provider does not auto populate correctly then you might not be in the correct EDA mode and this will impact your report.
- ii. Select *This provider ONLY*.

- iii. Select *Incoming referrals to provider* from *Referral Type* if your project is a Shelter. Select *Outgoing referrals* if your project is a referring for Coordinated Entry..
- iv. Select *Referral Status*. *Outstanding* will include Referrals without a Referral Outcome. *Closed* will include those with any Referral Outcome. *All* will include any Referral Outcome.
- v. Enter your date range you want to check referrals for. This will pull referrals based on the date they were sent. Not the date referrals had an outcome added.
- vi. Default *Sort Order* is by date, custom sorting is not required. (Skip)

Report Options	
Provider *	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)
	<input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY
Referral Type *	Incoming referrals to provider ▾
Referral Status	<input checked="" type="radio"/> Outstanding <input type="radio"/> Closed <input type="radio"/> ALL
Referral Outcome	-All- ▾
Referral Date Range	07 / 20 / 2019 07 / 26 / 2019
Sort Order	Please Select a Sort Order <input type="button" value="Select"/> <input type="button" value="Clear"/>

B. Click *Build Report*.

Referral Outcome	-All- ▾	
Referral Date Range	09 / 18 / 2019	10 / 31 / 2019
Sort Order	Please Select a Sort Order	<input type="button" value="Select"/> <input type="button" value="Clear"/>
<input type="button" value="Export Report"/>		<input type="button" value="Build Report"/> <input type="button" value="Clear"/>

- C. Notes** may be viewed for clients by hovering the mouse over the notepad icon. CE Central staff will update the “notes section” with direction on the bed/room the client was placed in and household composition. Any additional needs they may have will also be identified here.

	Referral Outcome	Need Notes
ham County - Singles		

Need Notes

Checked in to room 1 bed 1, needs bottom bunk

- D. Review for referrals. Click blue hyperlinked *Name* and *Client ID* to navigate to *Client Profile* for entry and referral outcome updates.

Report Results											
Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
<input type="checkbox"/> 07/25/2019 2:00:00 AM	(16) Ice Cream, Flavor of						Emergency Shelter	CE Central - Durham County - DSS Front Door	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private		
Select ALL	Clear	Showing 1-1 of 1									

- E. If needed, you can download the complete report (including notes) through the *Export Report* button beneath the prompts.
- i. This report will download as a Zip File, but within that is an Excel sheet.