

Instructions for Using the Self-Referral Report

- On the [Membership](#) page under **NC State Chapter Resources**, **click on Self-Referral Report & Script**:

NC State Chapter Resources:

Potential Member Resources

Script for Seeking a Transfer

Script for Non-Member Introduction

Self-Referral Report & Script

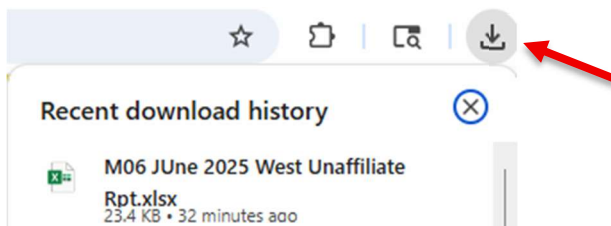
** File will download in Excel format to your computer*

Not sure of your region? Refer to the map above; or scroll down the page and click on the [Regional Map](#) under **NC Chapter Information**.

NC Chapter Information

- NC Chapter List
- NC Chapter Family Tree
- Regional Map

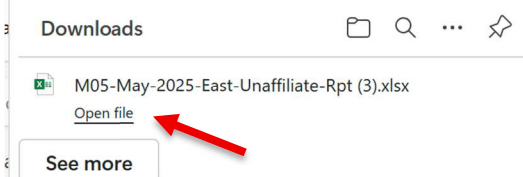
- If you are using Chrome as your browser , the **Self-Referral Report & Script** will automatically download as an Excel file to your computer when you click on it. Go to the down arrow on the top right of your web browser to open the report or find it in your Downloads file.



- If you are using Edge as your browser , the report will open in a new tab. Click **Download file** at the top of your browser to view the file in Excel.

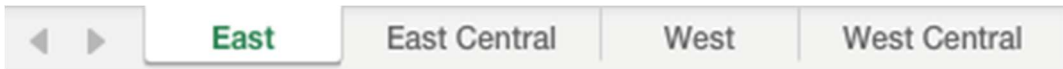
Download file

- Click on the Open File in the pop-up window.



- You will notice there are tabs at the bottom of the Excel file (see example below) for each

Region. Click on the tab for the Region that you would like to review. In this example, the East Region is selected.



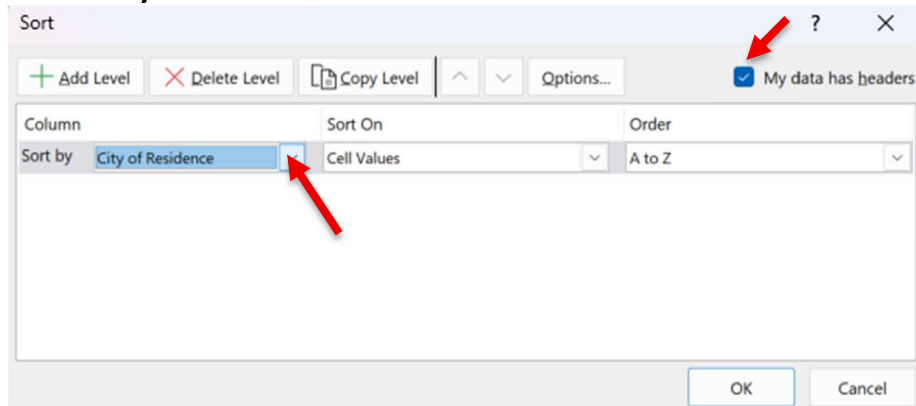
- The default sort for the file is by the column headed “Primary Area”. If you would like to sort by another column, follow the instructions below:
 - Click on “Enable Editing” at the top of the page.



- Find and click the “Sort” icon on the top toolbar:



- In the pop-up window (see below), select the column you would like to sort by. Make sure **My data has headers** is checked:



- Click OK when you have selected your Sort by and Order.
- Review the list and find the names of women who live near you, then reach out to them! Not sure what to say? Look at the Script that is included in the Excel file for some helpful ideas.
- Want to save your changes? Click on “File”, then on “Save as”. Choose where you want to save on your hard drive and name the file.
- Please report any updates or changes about a Self-Referral, by clicking on the [Submit Self-Referral Report Updates](#) link on the **Membership** page, located just below where you downloaded the report.

