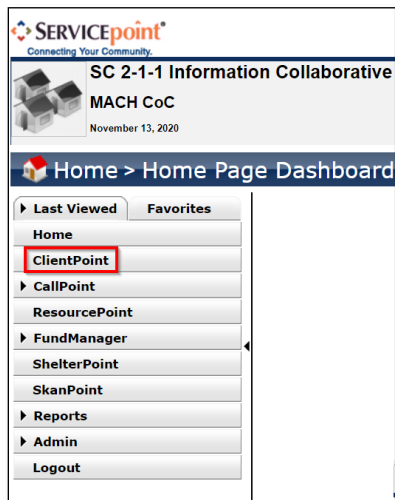


HMIS - How to View Referrals

1. Log into **HMIS**. The **Home Page Dashboard** displays.
2. Click on the **ClientPoint** module.



3. Search for the client through entering data in the fields under the **Client Search** or **Client Number** tabs.
 - 3a. If you use the **Client Search** tab:
 1. Enter the client's data (primarily use the SSN and full name fields).
 2. Click the **Search** button.
 3. Locate the client's data in the **Client Results** grid.
 4. Click the client's name to access their record. The **Back Date Mode** pop-up displays.



Client Search

Please Search the System before add
Items in Italics are for Data Entry ONLY and will n

Name	First Lauren	Middle	Last Test
Name Data Quality	-Select-		
Alias			
Social Security Number			
Social Security Number Data Quality	-Select-		
U.S. Military Veteran?	-Select-		
Exact Match	<input type="checkbox"/>		
Search ACTIVE Clients	<input checked="" type="radio"/>		
Search INACTIVE / DELETED Clients	<input type="radio"/>		
Search ALL Clients	<input type="radio"/>		

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

Client Results

Click the client's name to access their record

ID	Name ▲	Social Security Num
337012	Test, Lauren	333-22-9999

3b. If you enter data under the **Client Number** tab:

1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # 337012 **Submit**



- When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.

Back Date Mode

The current System Date is set to:
11/16/2020 11:30:19 AM

If you would like to use a different date, please select one below:

Back Date

11 / 16 / 2020

12 : 00 : 00 AM

Set New Back Date

Use Current System Date

- Click on the **Service Transactions** tab, then click on the **View Entire Service History** button.

Client Information

Service Transactions

Service Transaction Dashboard

Add Need

Add Service

Add Multiple Services

Add Referrals

View Previous Service Transactions

View Shelter Stays

View Entire Service History

- The screen automatically displays the **Entire Service History** tab. Click the **Referrals** tab.

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

All Service Transactions

Select Dates

Start Date

End Date

Search

	Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
	Need	11/17/2020	MACH CoC	Job Finding Assistance	Closed / Fully Met	
	Referral	11/18/2020	Goodwill Job Connection - Columbia (Decker Blvd)	Job Finding Assistance		
	Need	11/17/2020	MACH CoC	Emergency Food	Closed / Fully Met	
	Referral	11/18/2020	Harvest Hope Food Bank	Emergency Food		
	Need	11/16/2020	MACH CoC	Case/Care Management	Closed / Fully Met	
	Service	11/16/2020	MACH CoC	Case/Care Management		



7. To filter the search referrals list (optional): Click the **Select Dates** drop-down OR enter data in the **Start Date/End Date** fields. Click the **Search** button.

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
11/17/2020	11/18/2020	Goodwill Job Connection - Columbia (Decker Blvd)		Job Finding Assistance	Closed	Fully Met
11/17/2020	11/18/2020	Harvest Hope Food Bank		Emergency Food	Closed	Fully Met

8. To narrow down the search results: Click the **More** button to display the **Referral Status** drop-down and/or the **Referred-To Provider** drop-down. Click the **Search** button.

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
11/17/2020	11/18/2020	Goodwill Job Connection - Columbia (Decker Blvd)		Job Finding Assistance	Closed	Fully Met
11/17/2020	11/18/2020	Harvest Hope Food Bank		Emergency Food	Closed	Fully Met

9. To view additional details, click on the **pencil icon** on the row beside the referral.

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
11/17/2020	11/18/2020	Goodwill Job Connection - Columbia (Decker Blvd)		Job Finding Assistance	Closed	Fully Met
11/17/2020	11/18/2020	Harvest Hope Food Bank		Emergency Food	Closed	Fully Met

10. The **Edit Referral** screen automatically displays.