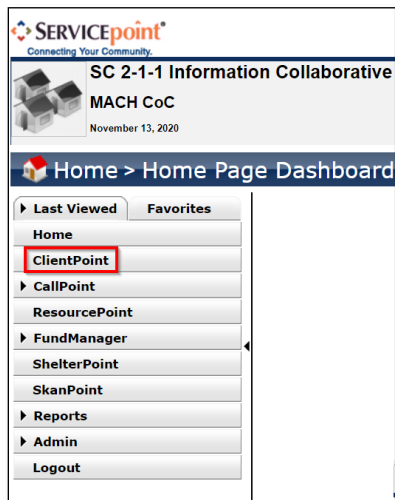


# HMIS - How to View a Service Transaction

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. View a list of the Needs and Services on the client's file.

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	11/17/2020	Goodwill Job Connection - Columbia (Decker Blvd)	Job Finding Assistance		

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