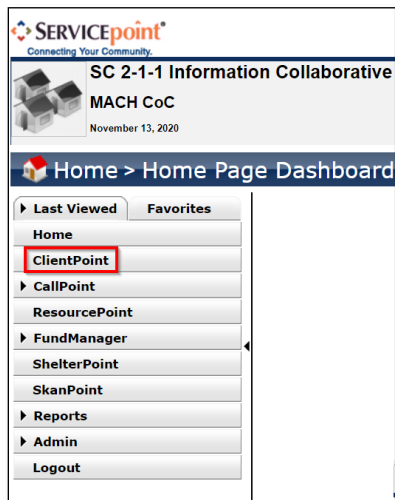


HMIS - How to Remove a Referral

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 trash can next to the **Need**.

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		

Showing 1-1 of 1



7. Read the **Delete Need** pop-up that displays. To proceed with removing the Need, click the **Delete** button.

Delete Need

Are you sure you want to delete this Need (#3876164)?

1 Service(s) and 0 Referral(s) are attached to this Need and will also be deleted.

Delete Cancel

8. The screen displays the **Entire Service History** tab. Both the **Need** and **Referral** records no longer display.

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

No matches.

Back to Dashboard Exit