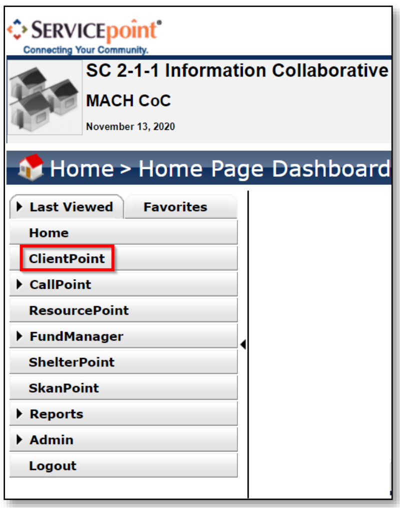
HMIS - How to Edit a Service Transaction

1. Log into **HMIS**. The **Home Page Dashboard** displays.

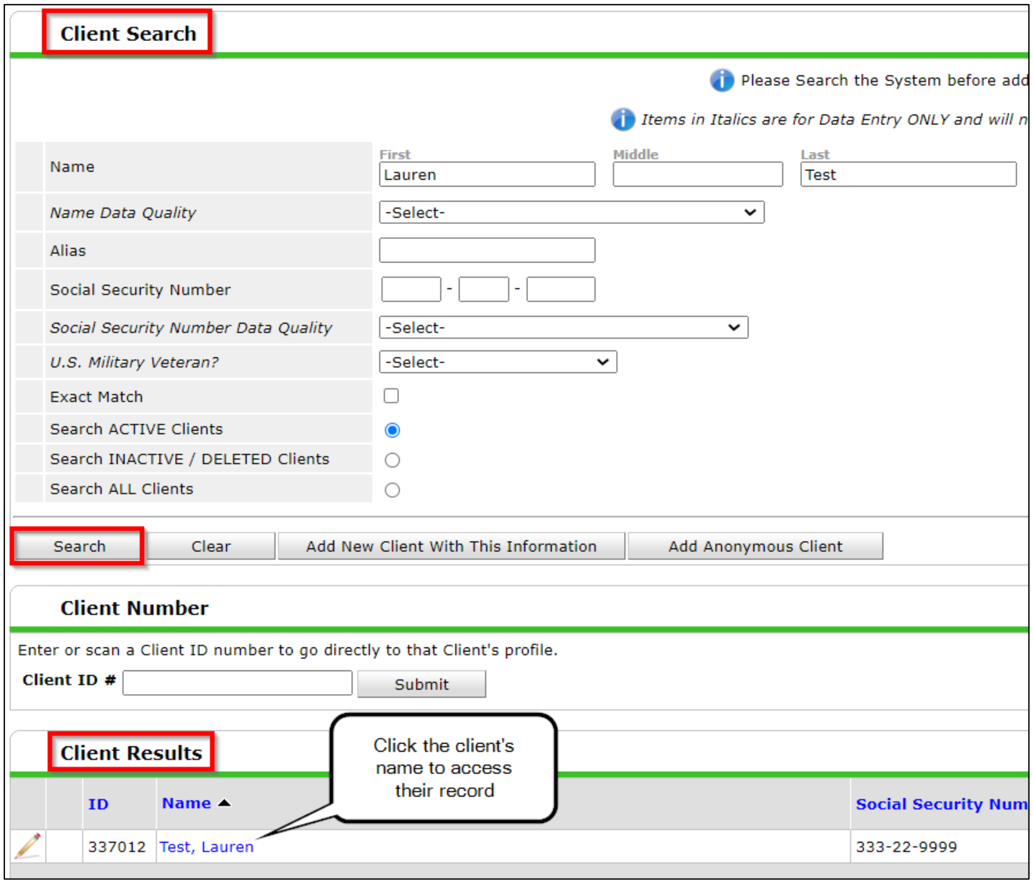
2. Click on the **ClientPoint** module.



3. Search for the client through entering data in the fields under the **Client Search** or **Client Number** tabs.

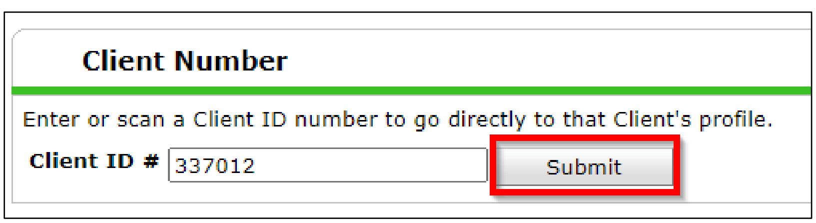
    3a. If you use the **Client Search** tab:

    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.

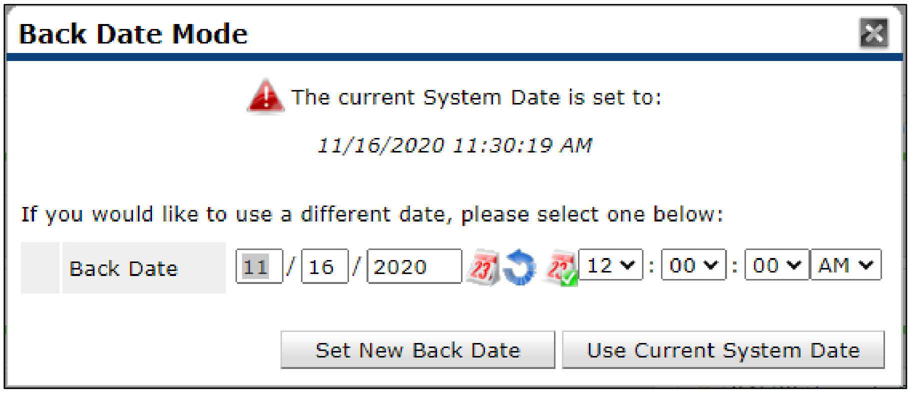


3b. If you enter data under the **Client Number** tab:

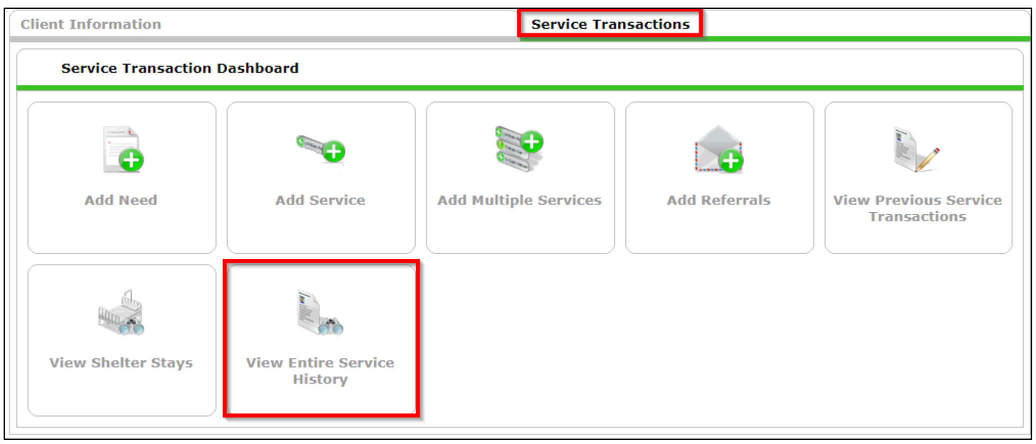
1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.



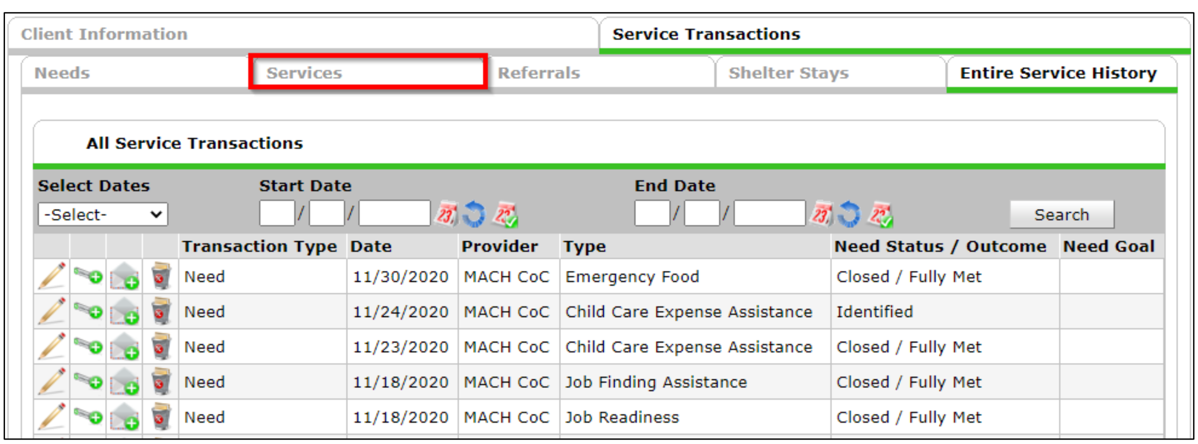
4. When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.



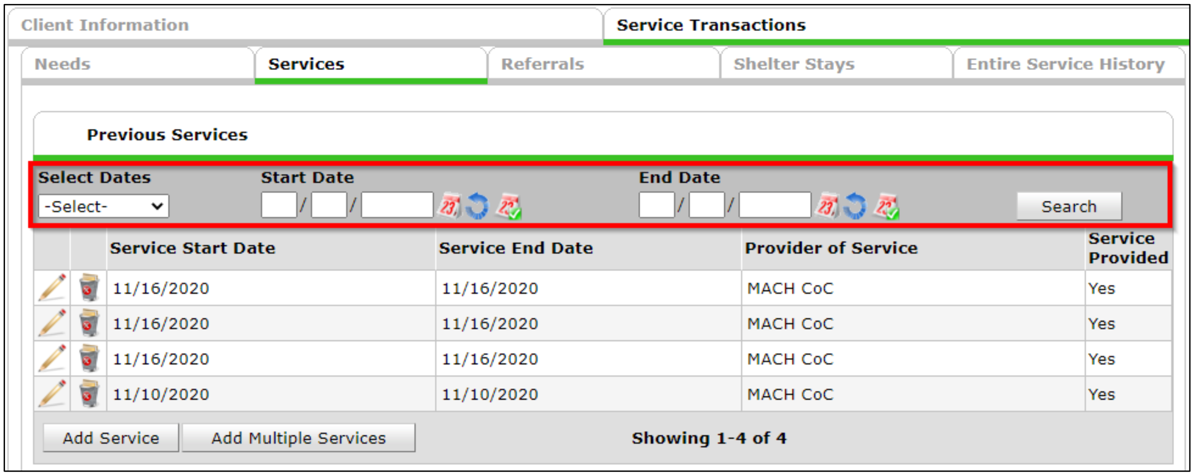
5. Click on the **Service Transactions** tab, then click on the **View Entire Service History** button.



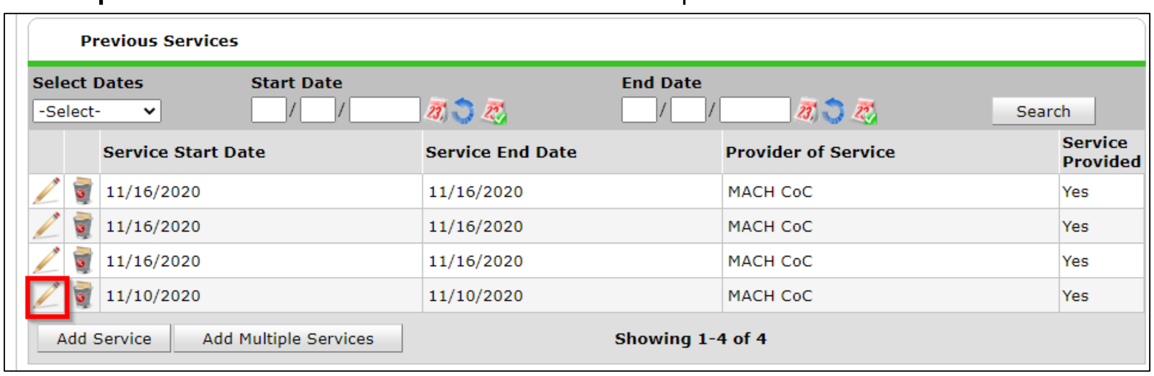
6. The screen automatically displays the **Entire Service History** tab. Click the **Services** tab.



7. To filter the search by the date the referral was made, click on the **Select Dates** drop-down, **Start Date** fields, and **End Date** fields. Click the **Search** button.

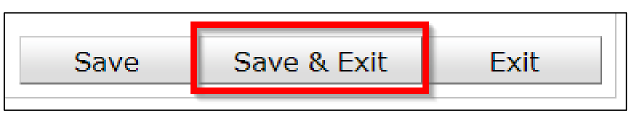


8. Click the **pencil icon** on the row of the service that needs to be updated.



9. The **Edit Referral** screen automatically displays. Make the necessary updates.

10. Click the **Save** and **Exit** button at the bottom of the screen.



11. The screen automatically returns to the **Services** tab and displays the list of services that the client received.