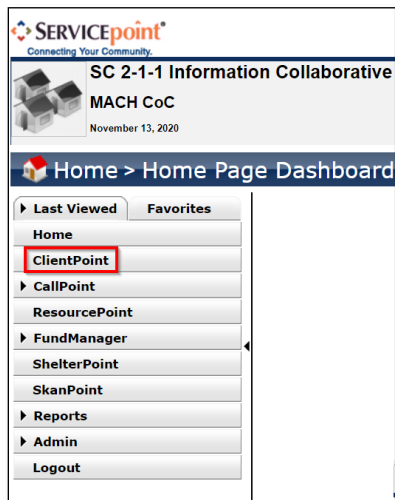


HMIS - How to Edit a Service Transaction

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.



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 # **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 **Services** 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	11/30/2020	MACH CoC	Emergency Food	Closed / Fully Met	
	Need	11/24/2020	MACH CoC	Child Care Expense Assistance	Identified	
	Need	11/23/2020	MACH CoC	Child Care Expense Assistance	Closed / Fully Met	
	Need	11/18/2020	MACH CoC	Job Finding Assistance	Closed / Fully Met	
	Need	11/18/2020	MACH CoC	Job Readiness	Closed / Fully Met	



- 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.

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

Previous Services









Select Dates

Start Date

End Date

/ /

 / /

	Service Start Date	Service End Date	Provider of Service	Service Provided
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/10/2020	11/10/2020	MACH CoC	Yes

Add Service

Add Multiple Services

Showing 1-4 of 4

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

Previous Services				
Select Dates	Start Date		End Date	
-Select-	<input type="text"/>		<input type="text"/>	
<input type="button" value="Search"/>				
	Service Start Date	Service End Date	Provider of Service	Service Provided
	11/16/2020	11/16/2020	MACH CoC	Yes
	11/16/2020	11/16/2020	MACH CoC	Yes
	11/16/2020	11/16/2020	MACH CoC	Yes
	11/10/2020	11/10/2020	MACH CoC	Yes
<input type="button" value="Add Service"/> <input type="button" value="Add Multiple Services"/>				

Showing 1-4 of 4

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

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

Previous Services









Select Dates

Start Date

End Date

-Select-

Search

	Service Start Date	Service End Date	Provider of Service	Service Provided
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/16/2020	11/16/2020	MACH CoC	Yes
 	11/10/2020	11/10/2020	MACH CoC	Yes

Add Service

Add Multiple Services

Showing 1-4 of 4

Back to Dashboard

Exit