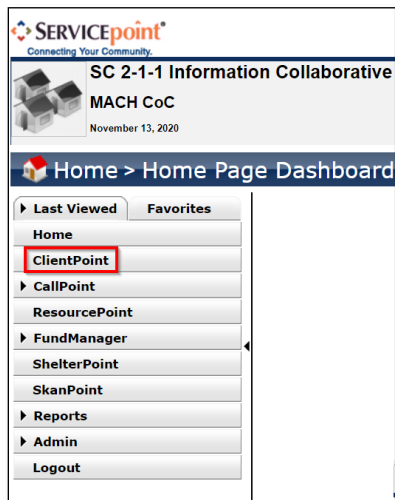


HMIS - How to Add a Service Transaction

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 adding a new client.
Items in Italics are for Data Entry ONLY and will not be used for reporting.

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 Number
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.

The screenshot shows a 'Back Date Mode' dialog box. At the top, it states 'The current System Date is set to: 11/16/2020 11:30:19 AM'. Below this, it asks 'If you would like to use a different date, please select one below:'. There is a date picker showing '11 / 16 / 2020' and a time picker showing '12 : 00 : 00 AM'. At the bottom, there are two buttons: 'Set New Back Date' and 'Use Current System Date'.

- Click on the **Service Transactions** tab, then click on the **Add Service** button. The screen displays the **Add Service** tab.

The screenshot shows the 'Service Transactions' tab in a client information system. The 'Service Transaction Dashboard' contains several buttons: 'Add Need', 'Add Service' (highlighted with a red box), 'Add Multiple Services', 'Add Referrals', 'View Previous Service Transactions', 'View Shelter Stays', and 'View Entire Service History'.

- If the client is a member of a member of a household, you will see the **Household ID** with the members listed below. The head of household automatically has a gray checkmark beside their name. When appropriate, place a checkmark next to the household member(s) who received the referral(s).

The screenshot shows a 'Household Members' section. It has a dropdown arrow and the title 'Household Members'. Below the title, there is a list of household members. The first member is '(84737) Male Single Parent' with an unchecked checkbox. The second member is '(337431) Test, Doug' with a checked checkbox. The third member is '(337838) Test, Sean' with an unchecked checkbox.



7. Click the **Service Provider** drop-down and select the program and funding source of the service.

The screenshot shows a form with the following fields and annotations:

- Service Provider ***: A dropdown menu with "MACH-Fort Lawn COVID-ESG-HP (15921)" selected. A callout box points to it with the text: "NOTE: This selection is an example! Select the program and funding source of the service".
- Creating User**: "MACH-Lauren Hopkins"
- Start Date ***: "11 / 24 / 2020" with time "11 : 28 : 34 AM".
- End Date**: "11 / 24 / 2020" with time "11 : 28 : 34 AM".
- Service Type ***: A dropdown menu with "-Select-" selected. A callout box points to it with the text: "Select the service that provided".
- Provider Specific Service**: A dropdown menu with "-Select-" selected.
- Look Up**: A button.
- Save & Continue**: A button, highlighted with a red box.
- Cancel**: A button.

8. Enter the **Start Date** and **End Date** that the service was provided. If desired, enter times.

NOTE: If the service was provided in day, enter the same date in the date fields.

9. Click the **Service Type** drop-down and select the service that was provided.

10. Click **Save & Continue**. The page displays the **Edit Service** tab.

11. If necessary, click the pencil icon to edit data in the **Service Provider**, **Dates**, and **Service Type** fields.

12. In the **Service Notes** field, enter a description of the services provided.

The screenshot shows the "Edit Service" form with the following fields and annotations:

- Service Provider ***: "MACH CoC (112)" with a pencil icon.
- Creating User**: "MACH-Lauren Hopkins"
- Start Date ***: "11 / 24 / 2020" with time "1 : 36 : 35 PM".
- End Date**: "11 / 24 / 2020" with time "1 : 36 : 35 PM".
- Service Type ***: "Child Care Expense Assistance (NL-3000.1500)" with a pencil icon.
- Provider Specific Service**: A dropdown menu with "-Select-" selected.
- Service Staff**: A dropdown menu with "-Select-" selected.
- Service Notes**: A text area, highlighted with a red box. A callout box points to it with the text: "Describe the services provided".

13. If appropriate, enter data in the **Number of Units** and **Total Cost of Units** fields.

Service Costs

Number of Units	<input type="text"/>
Unit Type	-Select- ▼
Cost per Unit	
Total Cost of Units	\$ <input type="text"/>

14. To upload support documentation, follow these steps:

14a. Scroll to the **Support Documentation** tab.

14b. Click the **Add Support Documentation** button.

Support Documentation

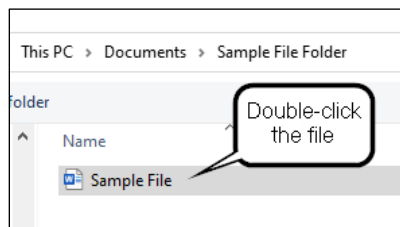
Date Added ▼	Name	Description	Type
Add Support Documentation		No matches.	

14c. Click the **Choose File** button.

Upload Support Documentation

Name *	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Choose File</div> No file chosen
Description	<input style="width: 90%;" type="text"/>
<input type="button" value="Upload"/> <input type="button" value="Cancel"/>	

14d. Select the file and double-click.





14e. Once the file displays on the **Upload Support Documentation** pop-up, click the **Upload** button.

15. If you would like a reminder to follow-up with the client, follow the steps below:

- In the **Projected Follow Up Date** field, enter the date that the follow-up reminder should sent.
- In the **Follow Up User** drop-down, select the name of the staff member who should receive the reminder.

16. Scroll to the **Need Information** section.

- In the **Need Status** drop-down, select “Closed.”
- In the **Outcome** drop-down, select “Fully Met.”

NOTE: These fields are pertaining to the service that you provided, not the total needs that the client has. Therefore, if you have successfully provided a service, then the service need status is closed and has been fully met.

- Click the **Notes** icon to enter a note pertaining to the need, if necessary.

17. Click the **Save & Exit** button.



18. The screen automatically displays the **Services** tab where a list of all of the client services are listed.

Client - (337129) Test, Lisa Mass Visibility Update

(337129) Test, Lisa
Release of Information: **None** -Switch to Another Household Member- Submit

Client Information Service Transactions

Needs **Services** Referrals Shelter Stays Entire Service History

Previous Services

Select Dates Start Date End Date Search

	Service Start Date	Service End Date	Provider of Service	Service Provided	Referred To Provider	Service Type
	11/24/2020	11/24/2020	MACH-Fort Lawn COVID-ESG-HP	Yes		Child Care Expense Assistance
	11/16/2020	11/16/2020	MACH CoC	Yes		Case/Care Management
	11/16/2020	11/16/2020	MACH CoC	Yes		Benefits Screening
	11/16/2020	11/16/2020	MACH CoC	Yes		Benefits Assistance
	11/10/2020	11/10/2020	MACH CoC	Yes		Bus Fare

Add Service Add Multiple Services Showing 1-5 of 5

Back to Dashboard Exit

19. Click on the **Entire Service History** tab. Notice that you see **Need** and **Service** transaction types with the same **Date/Provider/Type**.

NOTE: When you add a service, HMIS also creates a need at the same time.

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	11/24/2020	MACH-Fort Lawn COVID-ESG-HP	Child Care Expense Assistance	Closed / Fully Met	
	Service	11/24/2020	MACH-Fort Lawn COVID-ESG-HP	Child Care Expense Assistance		
	Need	11/16/2020	MACH CoC	Case/Care Management	Closed / Fully Met	
	Service	11/16/2020	MACH CoC	Case/Care Management		