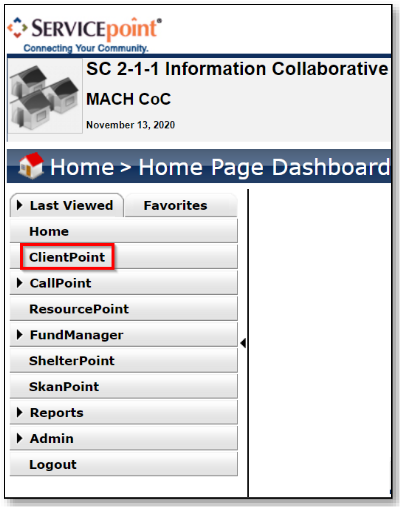
HMIS - How to Add a Service Transaction

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

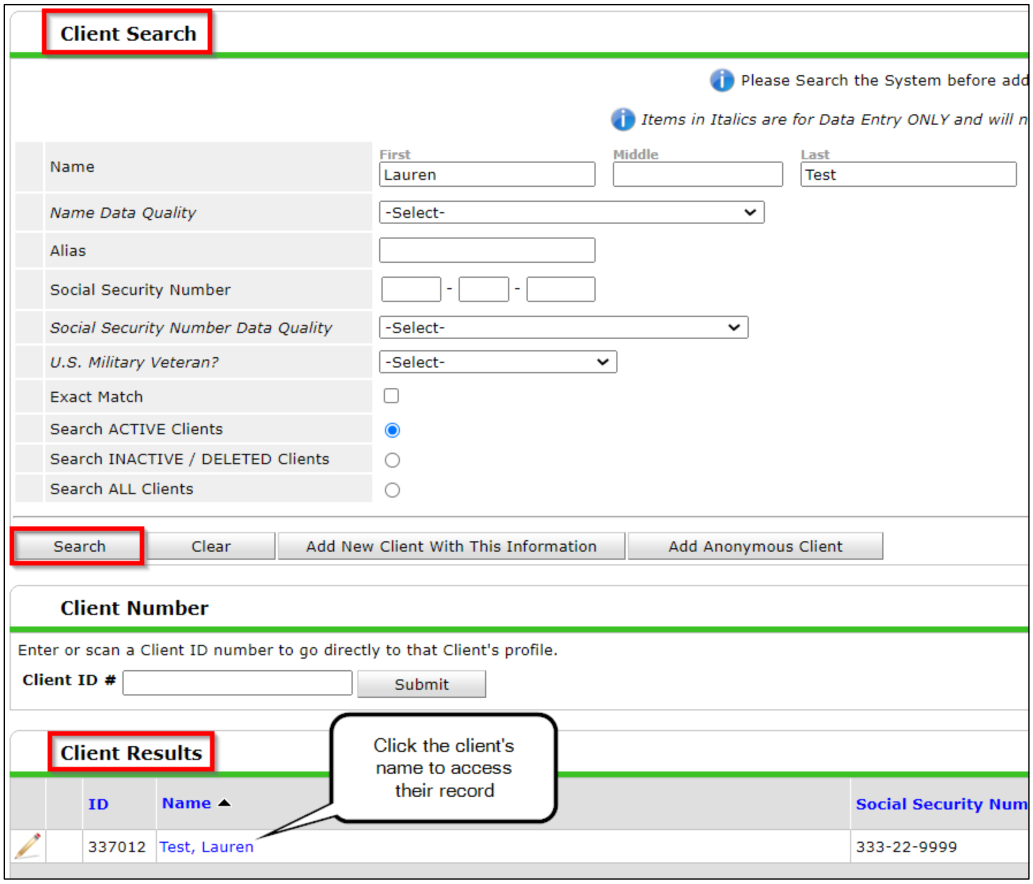
2. Click on the **ClientPoint** module.



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

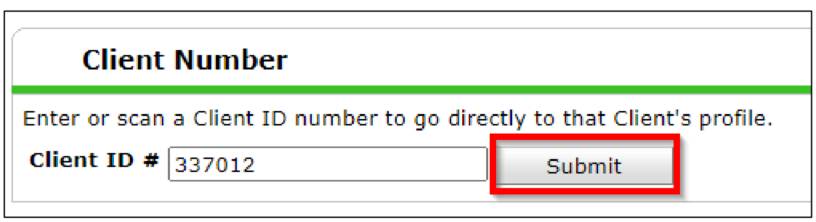
   3a. If you use the **Client Search** tab:

   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.

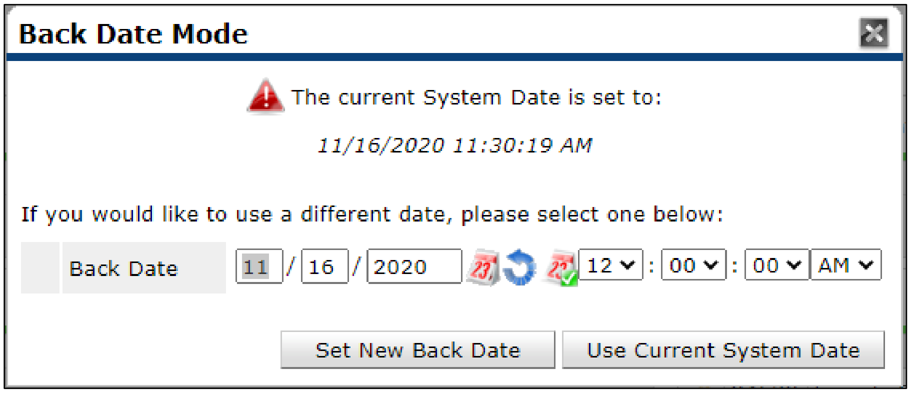


3b. If you enter data under the **Client Number** tab:

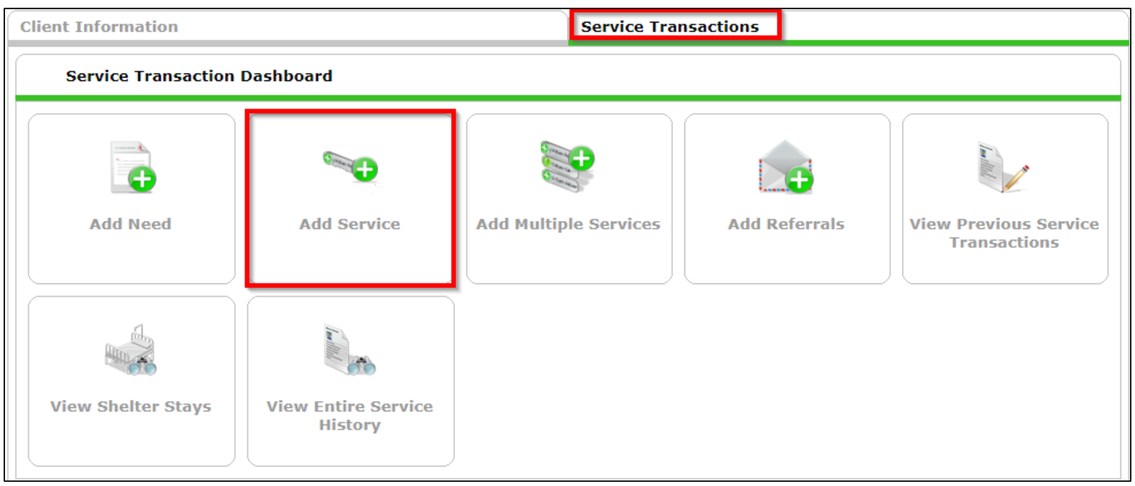
1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.



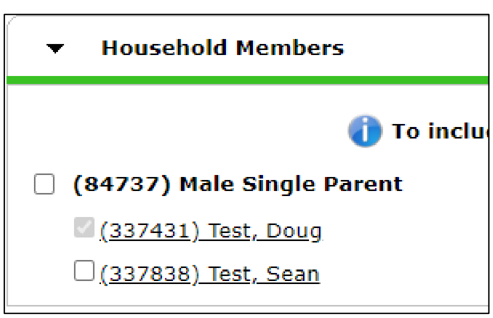
4. When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.



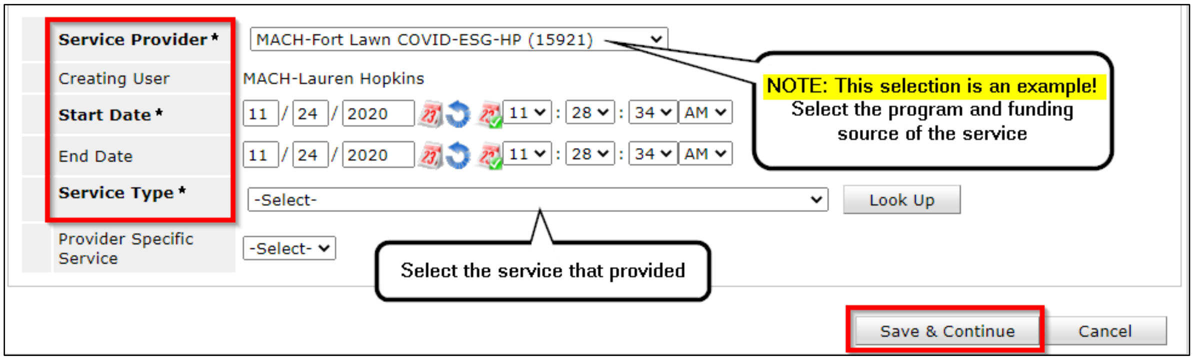
5. Click on the **Service Transactions** tab, then click on the **Add Service** button.
   The screen displays the **Add Service** tab.



6. 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).



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



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

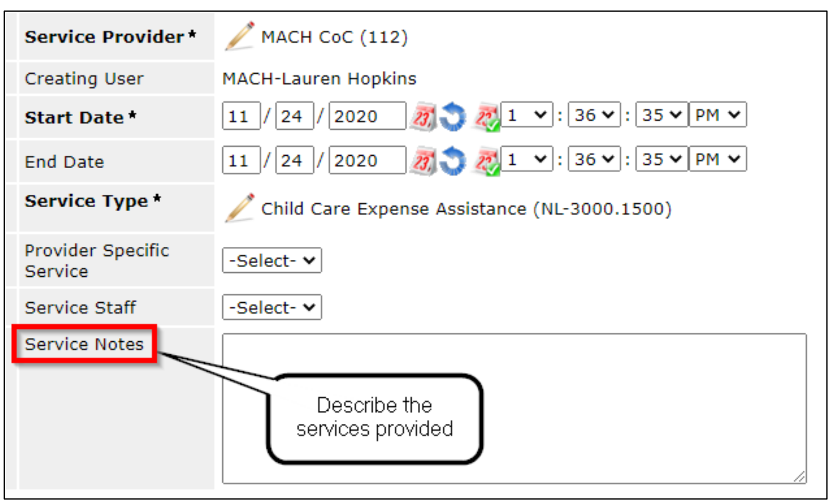
NOTE: If the service was provided in day, enter the same date in the date fields.

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

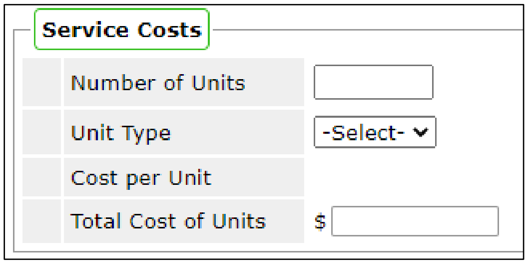
10. Click **Save & Continue**. The page displays the **Edit Service** tab.

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.



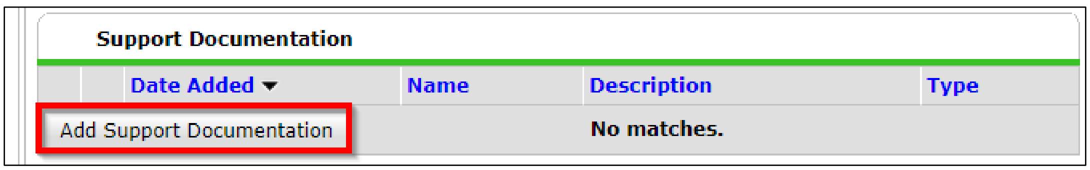
13. If appropriate, enter data in the **Number of Units** and **Total Cost of Units** fields.



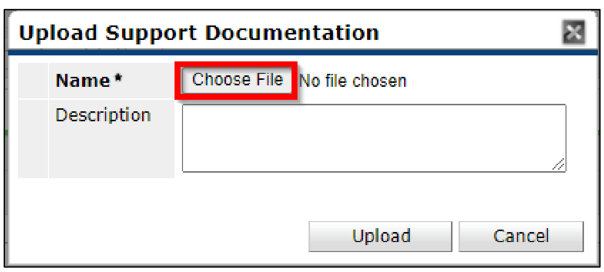
14. To upload support documentation, follow these steps:

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

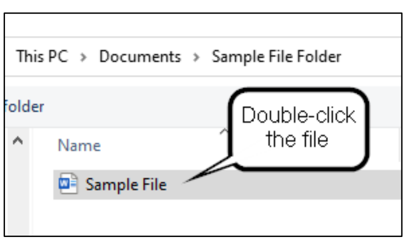
    14b. Click the **Add Support Documentation** button.



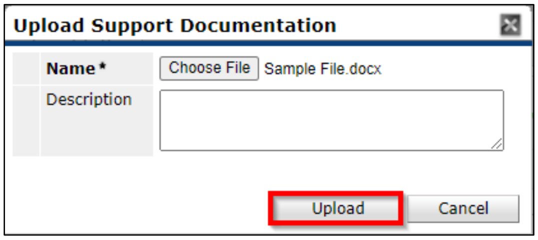
    14c. Click the **Choose File** button.



    14d. Select the file and double-click.

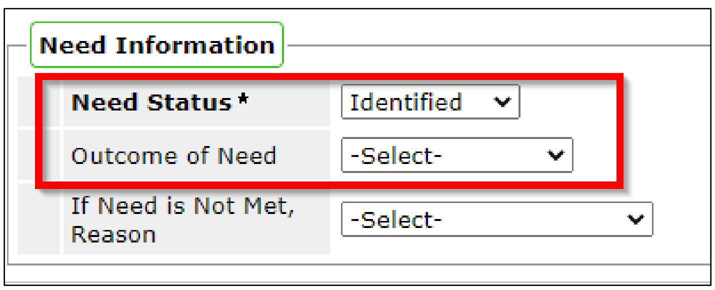


14e. Once the file displays on the **Upload Support Documentation** pop-up, click the **Upload** button.



15. If you would like a reminder to follow-up with the client, follow the steps below:
    a. In the **Projected Follow Up Date** field, enter the date that the follow-up reminder should sent.
    b. 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.



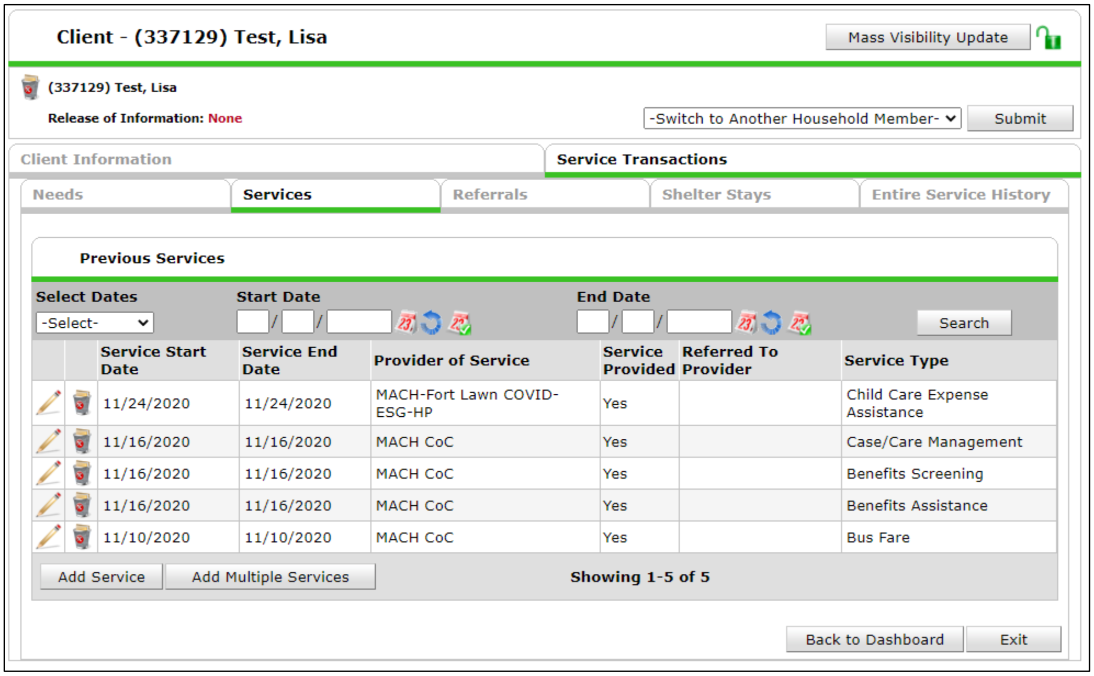
    a. In the **Need Status** drop-down, select "Closed."
    b. In the **Outcome** drop-down, select "Fully Met."

       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.

    c. 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.



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.