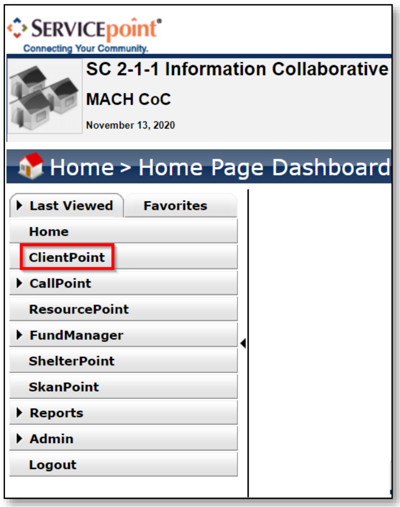
HMIS - How to Remove a Service Transaction

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

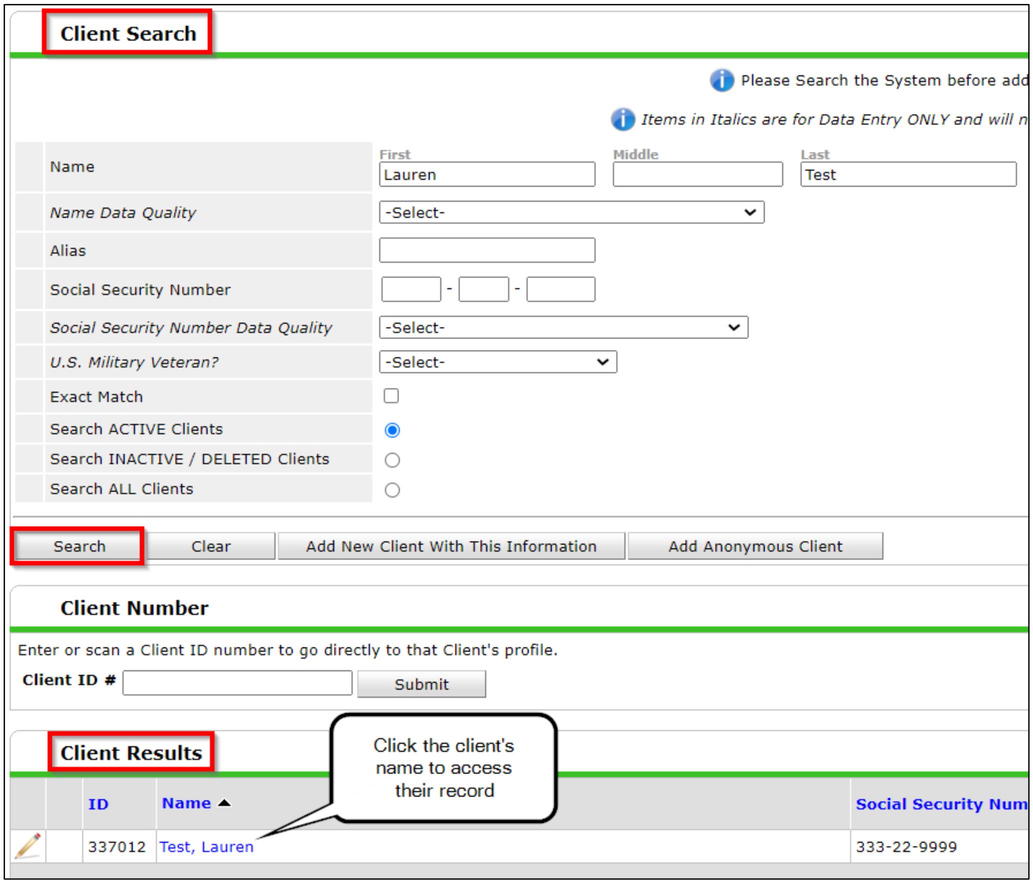
2. Click on the **ClientPoint** module.



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

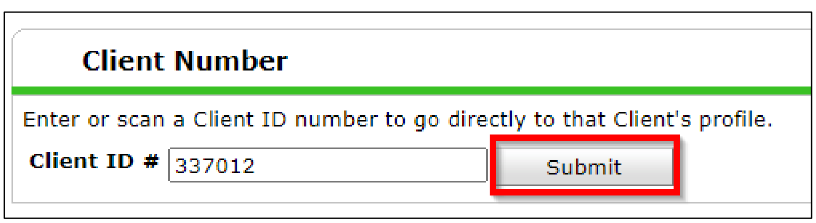
   3a. If you use the **Client Search** tab:

      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.

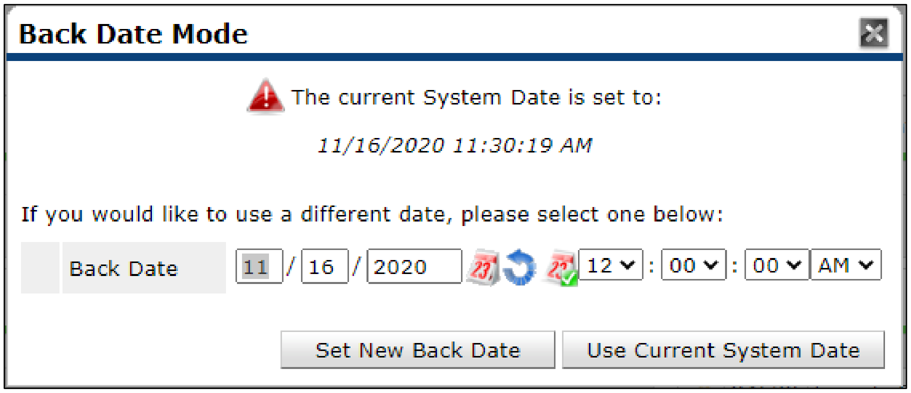


3b. If you enter data under the **Client Number** tab:

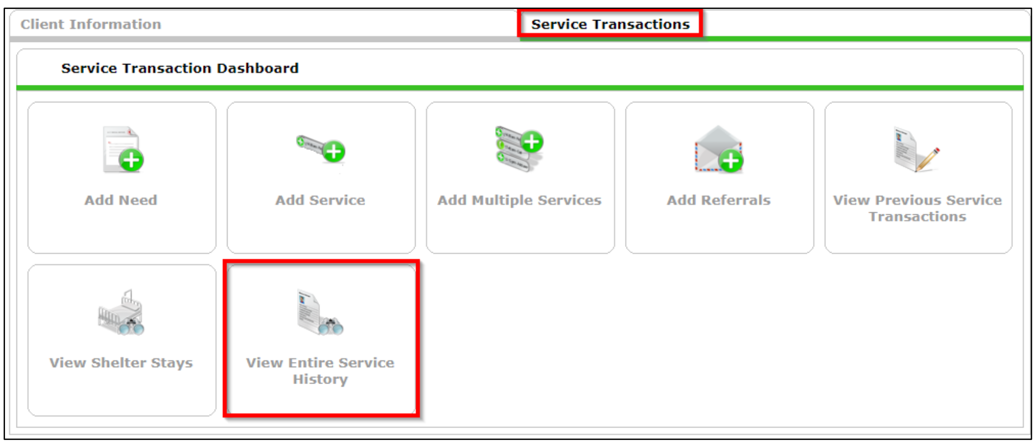
1. Enter the **Client ID**.
2. Click the **Submit** button. The **Back Date Mode** pop-up displays.



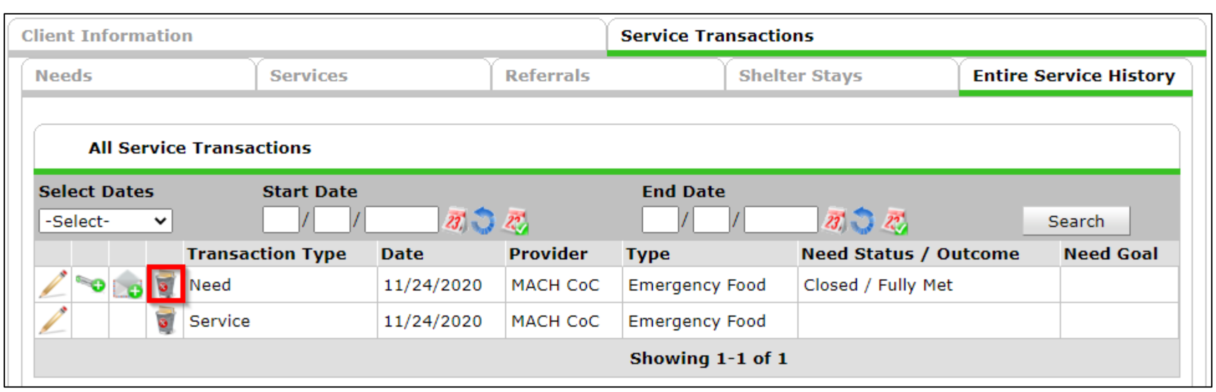
4. When the **Back Date Mode** pop-up displays, make the appropriate selection by clicking the **Set New Back Date** button or the **Current System Date** button. Once a selection is made, the pop-up disappears and the client's record displays.



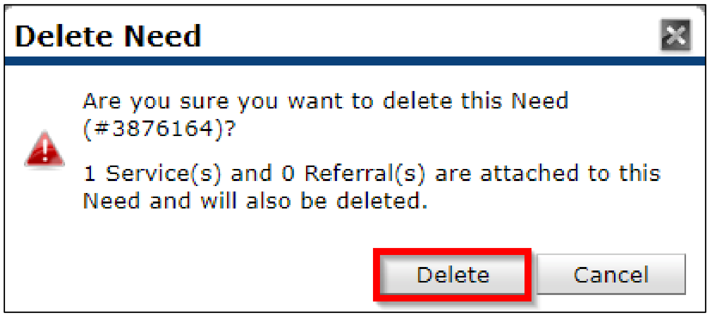
5. Click on the **Service Transactions** tab, then click on the **View Entire Service History** button.



6. The screen automatically displays the **Entire Service History** tab. Click the trash can next to the **Need**.



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



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