HIPSK

HT9: HOW TO ADD OR EDIT A STORAGE ITEM

The Storage module can be used to record items that are being stored at the service provider for the client.

Add Storage Item

1. From the Front Desk menu, select Storage.

2. On the Storage List page, click the Add Storage Item button.

3. From the Add Storage Item page, type to search for an existing client in the Client Name field, then select the client from the search results.

4. Enter the item name and, if applicable, the location of where it is being stored.

5. Confirm the start date. If needed, change the date.

6. If applicable, enter the end date.

7. If applicable, add any additional information concerning the storage item in the Comments field.

8. Click the Save button.

Edit Storage Item

1. From the Front Desk menu, click Storage.

2. On the Storage List page, locate the storage item you want to modify and click the Edit button.

3. On the Edit Storage Item page, you can edit the existing information or add any missing or additional information. This may involve end-dating the item to indicate that it was either collected by the client or disposed of or adding a comment to the same effect.

4. Click the Save button.