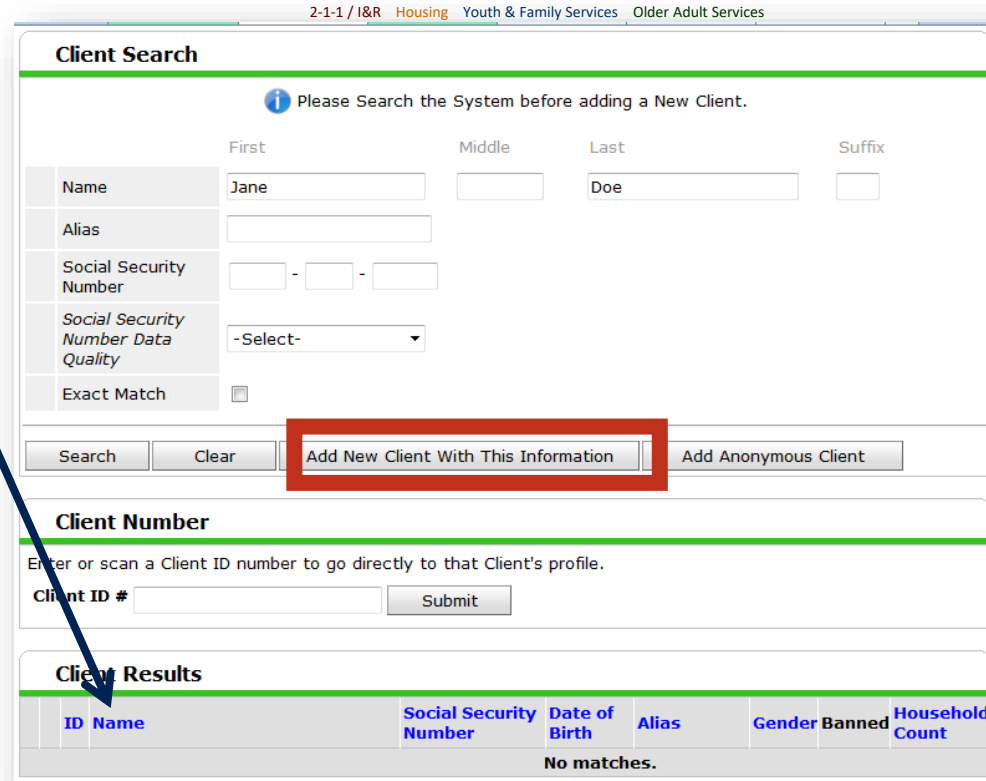# How to Track Those Ever Changing Households

Agenda

- **Creating a New Household**

- **Removing a Client From a Household**

- **Adding a New Client to an Existing Household**

- **Adding a Returning Household Member to an Existing Household**

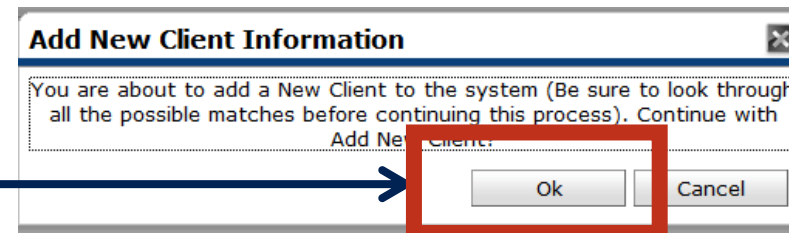- **Deleting a Client From a Household**

Creating a New Household

Client Profile Search / Creation

Matching Client Records will be listed under the "Client Results" section (at the bottom of the page). If a matching record exists, click the pencil/edit icon to the left of the Client's Name, otherwise click the "Add New Client…" button to create a new Client Profile.

If the client does not already exist in the database, add him/her. *You will encounter this warning pop-up window.*

New Household Creation

Select the "Households" Tab

Then select "Start New Household"

New Household Creation

Select the Household Type, then proceed to search for additional household members.

If the additional household member does not already exist in the database, add him/her. *You will encounter this warning pop-up window.*

New Household Creation

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
			No matches.				

Selected Clients

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count	
🚫	74	Dough, Jack						0	🔍
	73	Dough, Jane						0	🔍
🚫	75	Dough, Jill						0	🔍

Showing 1-3 of 3

[Continue] [Cancel]

Clients added to the household will appear under the "Selected Clients" section at the bottom of the "Add New Household" pop-up window. ***Click the "Continue" button once all household members have been added to the group***.

Initial Household Data Capture

Answer the "Head of Household", "Relationship", and "Joined" questions at the top of the Household Info pop-up window, and click the SAVE button.

The magnifying glasses will show previous associations with the household and other households the client is a part of.

Initial Household Data Capture

Complete the assessment for the client. Work from the top of the page down to the bottom & click the SAVE button. Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved. When complete, click the SAVE & EXIT button at the top/bottom of the pop-up window.

Removing a Client From a Household

Removing a Client from Household

Type the client's name or ID # of the client that you are removing and click "Search".

Click on the pencil next to the client's name.

Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	Pet		Ros	
Alias				
Social Security Number	___ - ___ - ___			
Social Security Number Data Quality	-Select-			
Exact Match	☐			

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

	ID	Name ▲		Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	2	Rose, Pete		998-87-7665	04/14/1941	Charlie Hustle	Male		1 🔍
	32	Rose, Pete, III			08/01/1999		Male		1 🔍
	881	Rose, Pete, Jr			04/01/1976		Male		1 🔍

Removing a Client from Household

On the Entry/Exit tab, click on the pencil next to the "Exit Date" with on value for your program.

Removing a Client from Household

Make sure that only the client(s) that is leaving the program is checked.

Make sure that the exit date is the correct date.

Answer the "Reason for Leaving" and "Destination".

Then click "Save & Continue"

Edit Exit Data - (882) Rose, Pete, III

Household Members

ℹ️ To update Household members for this Exit Data, click the box beside each name.

☐ (258) **Male Single Parent**
 ☐ (7...) Rose, Pete
 ☑ (882) Rose, Pete, III
 ☐ (88...) Rose, Pete, Jr

Edit Exit Data - (882) Rose, Pete, III

Exit Date*	11 / 25 / 2013 12 ▼ : 00 ▼ : 00 ▼ AM ▼
Reason for Leaving	-Select- ▼
If "Other", Specify	
Destination*	-Select- ▼
If "Other", Specify	
Notes	
Subsidy	-Select- ▼

[Save & Continue] [Cancel]

Removing a Client from Household

If other household members need to be exited, click on "Include Additional Household Members" then complete the "HUD Exit" Assessment and click "Save and Exit"
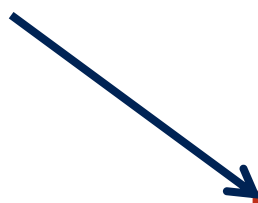
Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

| Provider* | Bob's Men's Shelter (20) |
| Type* | HUD |

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
🔒	(72) Rose, Pete	Yes	10/01/2013						
🔒	(882) Rose, Pete, III	No	10/01/2013	11/25/2013			Other	Staying or living with family, permanent tenure (HUD)	
🔒	(881) Rose, Pete, Jr	No	10/01/2013						

Include Additional Household Members   Showing 1-3 of 3

Removing a Client from Household

It is preferable to remove members from within their own client record or the head of household's client record.

- Select the "Households" Tab
- Then select "Manage Household"

Removing a Client from Household

Click on the red minus sign to the left of the client that is leaving or has left the household.

A pop up window will open. Enter the date that the client left the household. You do not have to be in backdate mode to enter a date.

Household Information - (32) Two Parent Family

(32) Two Parent Family   Save   Save & Exit   Exit

Household Type *	Two Parent Family	
Income	US$0.00	
Client Count	3	

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(112) Kardashian, Kim	32	Yes	Self	07 / 01 / 2013	0	1
(114) West, Kanye	36	No	significant other	07 / 01 / 2013	0	1
(113) West, North	0	No	daughter	07 / 01 / 2013	0	1

Add/Delete Household Members   Household History Report

Client Left Household

By removing this Client from the Household you will no longer be able to associate them with Household information including Goals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date.

Please select the date the Client left the Household.

Date Client Left Household * 11 / 29 / 2013

Save   Cancel

Once the date have been entered click "save".

Removing a Client from Household

By clicking on the right arrow next to Previous Household Members, you can see the former members of the household.

Household Information - (32) Two Parent Family

(32) Two Parent Family

Household Type*	Two Parent Family ▼
Income	US$0.00 🔍
Client Count	2

Save | Save & Exit | Exit

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household*		Previous Associations	Household Count
⊖	(112) Kardashian, Kim	32	Yes ▼	Self ▼	07 / 01 / 2013		0 🔍	1 🔍
⊖	(113) West, North	0	No ▼	daughter ▼	07 / 01 / 2013		0 🔍	1 🔍

Add/Delete Household Members | Household History Report

▼ **Previous Household Members**

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Left Household	Previous Associations	Household Count
↻	(114) West, Kanye	36	No	significant other	07/01/2013	09/30/2013	1 🔍	0 🔍

Adding a New Client to an Existing Household

Adding a new Client to the Household

Add Additional Household Members from the Head of Household!

- Select the "Households" Tab
- Then select "Manage Household"

Add/Delete Household Members - (32) Two Parent Family

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
	(112) Kardashian, Kim	32	Yes	Self	07/01/2013	0	1
	(69) Prufrock, Wilbur J	51	No		07/01/2013	0	2
	(114) West, Kanye	36	No	significant other	09/30/2013	1	1
	(113) West, North	0	No	daughter	07/01/2013	0	1

▼ **Previous Household Members**

ℹ **This Household does not have any previous members.**

▶ **Add Clients to the Household**

Continue   Cancel

Click on the right arrow next to "Add Clients to the Household" to open the Client Search Screen

Adding a new Client to the Household

Matching Client Records will be listed under the "Client Results" section (at the bottom of the page). If a matching record exists, click the green "plus" icon to the left of the Client's Name, otherwise click the "Add New Client…" button to create a new Client Profile.

Once all additional clients have been added, click continue.

Adding a new Client to the Household

If the new member changes the household type, change it here.

Set the "Relationship to Head of Household" for the newly added client(s).

Then complete the Individual Client Assessment for each new client added to household and click "Save".

After completing the assessment of all new household members, click "Save & Exit"

Adding a new Client to the Household

Go to the Entry / Exit Tab then click on the pencil to edit the entry.

Adding a new Client to the Household

Check the box next to the Two Parent Family to include all family members.

Then click "Save & Continue"

Edit Entry Data - (112) Kardashian, Kim

Household Members

ℹ️ To update Household members for this Entry Data, click the box beside each name.

☐ **(32) Two Parent Family**
  ☑ (112) Kardashian, Kim (Entry Date: 07/01/2013 8:00 AM)
  ☐ (116) Kardashian, Kourtney (Entry Date: 08/15/2013 8:00 AM)
  ☐ (114) West, Kanye (Entry Date: 07/01/2013 8:00 AM)
  ☐ (113) West, North (Entry Date: 07/01/2013 8:00 AM)

Include Additional Household Members

Edit Entry Data - (112) Kardashian, Kim

Provider	Family Promise - Bowman Training TH (2223)
Type	HUD
Entry Date *	07 / 01 / 2013 8 ▼ : 00 ▼ : 00 ▼ AM ▼

Save & Continue   Cancel

Click on the "Include Additional Household Members" button.

This will open a pop-up window that will allow you to add household members to the program entry.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider*	Family Promise - Bowman Training TH (2223) ▾
Type*	HUD ▾

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date		Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
🔓	(112) Kardashian, Kim	Yes	✏ 07/01/2013	✏						
🔓	(116) Kardashian, Kourtney	No	✏ 07/01/2013	✏						
🔓	(114) West, Kanye	No	✏ 07/01/2013	✏						
🔓	(113) West, North	No	✏ 07/01/2013	✏						

Include Additional Household Members   Showing 1-4 of 4

Entry Assessment

Adding a new Client to the Household

Make sure that there is a check mark next to the client that is joining the program after the rest of the household. No other members of the household should have a check mark next to their name.

Change the "Entry Date from the day the family entered the program to the date the new family member joined the program. Then click on the "Save & Continue" button.

You will then see the Entry Assessment. Answer the questions for the client as of the date that client joined your program. Then Save and Exit.

Edit Entry Data - (278) Kardashian, Khloe

Household Members

ℹ️ **To update Household members for this Entry Data, click the box beside each name.**

☐ **(32) Two Parent Family**

☐ (1 2) Kardashian, Kim (Entry Date: 07/01/2013 8:00 AM)

☑ (2 8) Kardashian, Khloe (Entry Date: 07/01/2013 8:00 AM)

☐ (1 6) Kardashian, Kourtney (Entry Date: 08/15/2013 8:00 AM)

☐ (1 4) West, Kanye (Entry Date: 07/01/2013 8:00 AM)

☐ (1 3) West, North (Entry Date: 07/01/2013 8:00 AM)

[Include Additional Household Members]

Edit Entry Data - (278) Kardashian, Khloe

Provider	Family Promise - Bowman Training TH (2223)
Type	HUD
Entry Date *	10 / 15 / 2013 8 ▼ : 00 ▼ : 00 ▼ AM ▼

[Save & Continue] [Cancel]

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment Assessment will still be attached to that Assessment record for the Client.

| Provider* | Family Promise - Bowman Training TH (2223) |
| Type* | HUD |

Update

Change the entry date for the client that joined the household to the date that they are joining the program by clicking on the pencil to the left of the Entry Date..

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reas
	(112) Kardashian, Kim	Yes	07/01/2013				
	(278) Kardashian, Khloe	No	07/01/2013				
	(116) Kardashian, Kourtney	No	08/15/2013				
	(114) West, Kanye	No	07/01/2013				
	(113) West, North	No	07/01/2013				

Include Additional Household Members

Showing 1-5 of 5

Entry Assessment

Adding a new Client to the Household

Edit Entry Data – (278) Kardashian, Khloe

Household Members

ℹ️ **To update Household members for this Entry Data, click the box beside each name.**

☐ **(32) Two Parent Family**

☑ (278) Kardashian, Khloe (Entry Date: 07/01/2013 8:00 AM)
☐ (116) Kardashian, Kourtney (Entry Date: 08/15/2013 8:00 AM)
☐ (114) West, Kanye (Entry Date: 07/01/2013 8:00 AM)
☐ (113) West, North (Entry Date: 07/01/2013 8:00 AM)

[Include Additional Household Members]

Edit Entry Data – (278) Kardashian, Khloe

Provider	Family Promise - Bowman Training TH (2223)
Type	HUD
Entry Date *	10 / 15 / 2013 8 ▼ : 00 ▼ : 00 ▼ AM ▼

[Save & Continue] [Cancel]

Make sure that only the client that is joining the program is checked. Then change the entry date for that client. that joined the household to the date that they are joining the program. Then click "Save and Continue".

How to Track Those Ever Changing Households

Click on the client that is being added to the program on the left side of the screen.

Complete all of the HUD Data for the client as of their date of entry.

Once all data is entered for the client, go to the bottom of the screen and click "Save & Exit"

		Name	Head of Household		Entry Date		Ex Da
🔓	👤	(112) Kardashian, Kim	Yes	✏️	07/01/2013	✏️	
🔓	👤	(278) Kardashian, Khloe	No	✏️	10/15/2013	✏️	
🔓	👤	(116) Kardashian, Kourtney	No	✏️	08/15/2013	✏️	
🔓	👤	(114) West, Kanye	No	✏️	07/01/2013	✏️	
🔓	👤	(113) West, North	No	✏️	07/01/2013	✏️	

Include Additional Household Members   Sh

Entry Assessment

Household Members

(112) Kardashian, Kim
Age: 32

(278) Kardashian, Khloe
Age: 29

Age: 34

(114) West, Kanye

Household Data Sharing

Client: (278) Kardashian, Khloe

APR DATA

Date of Birth   06 / 27 / 1984

Save   Save & Exit   Exit

Adding a Returning Household Member to an Existing Household

Previous Method for Adding a Returning Member

The method previously trained to add returning household members required exiting all current members of the household the day the member returned.

Then adding the returning member back to the household.

Then creating a new entry that includes all existing and the returning household member using the same date as the exit.

New Method for Adding a Returning Member

The new way to add a returning member of the household is to create a duplicate client record for the returning client.

Add the duplicate record to the household.

Add the duplicate record to the Entry/Exit of the household.

Merge the new client record to the old client record.

Adding a Returning Client to the Household

Re-add Returning Household Members from the Head of Household!

- Select the "Households: Tab

- Then select "Manage Household"

Client - (400) Osbourne, Sharon | Mass Visibility Update

(400) Osbourne, Sharon
Release of Information: None | -Switch to Another Household Member- ▼ | Submit

Client Information | **Service Transactions**

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Activities | Assessments

▼ (206) Two Parent Family

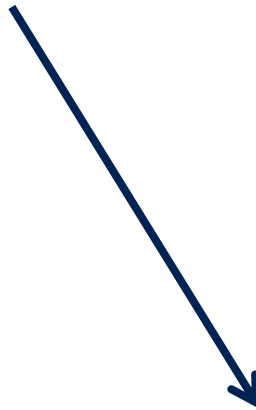| Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(400) Osbourne, Sharon	66	Yes	Self	10/26/2013	0	1
(745) Osbourne, Kelly	34	No	Daughter	11/01/2018	1	1

Manage Household

▶ **Previous Households**

Search Existing Households | Start New Household | Exit

Adding a Returning Client to the Household

Click on Add/Delete Household Members

Household Information - (206) Two Parent Family

(206) Two Parent Family

| | Save | Save & Exit | Exit |

Household Type *	Two Parent Family ▼
Income	US$0.00 🔍
Client Count	2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
⊖ (400) Osbourne, Sharon	66	Yes ▼	Self ▼	10 / 26 / 2013	0 🔍	1 🔍
⊖ (745) Osbourne, Kelly	34	No ▼	Daughter ▼	11 / 01 / 2018	1 🔍	1 🔍

| Add/Delete Household Members | | Household History Report |

▶ **Previous Household Members**

Adding a Returning Client to the Household

Click on the right arrow next to "Add Clients to the Household" to open the Client Search Screen

Add/Delete Household Members - (206) Two Parent Family

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
	(400) Osbourne, Sharon	66	Yes	Self	10/26/2013	0	1
	(745) Osbourne, Kelly	34	No	Daughter	11/01/2018	1	1

▼ Previous Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Left Household	Previous Associations	Household Count
	(758) Osborne, Jack	33	No	Son	03/01/2014	12/07/2016	1	0
	(399) Osbourne, Ozzy	70	No	Husband	10/26/2013	01/07/2019	1	0
	(884) Timberlake, Justin	43	No	Other non-relative	04/16/2014	06/01/2014	1	0

▶ Add Clients to the Household

Continue   Cancel

Adding a Returning Client to the Household

Enter the Client First and Last Name then click the Search which will make the "Add New Client With This Information" available.

Click on this button to create a duplicate client record for the returning client.

Client Search

Please Search the System before adding a New Client.   Hide Advanced Search

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	**First** Ozzy **Middle** **Last** Osbourne **Suffix**		
Name Data Quality	-Select-	Date of Birth	/ /
Alias		DOB Data Quality	-Select-
Social Security Number	- -	Gender	-Select-
Social Security Number Data Quality	-Select-	Primary Race	-Select-
U.S. Military Veteran?	-Select-	Secondary Race	-Select-
Exact Match	☐	Ethnicity	-Select-

Search   Clear   Add New Client With This Information   Add Anonymous Client

Adding a Returning Client to the Household

Click on the Green Plus Sign to move the client to the Selected Clients.

This will move the client to the Selected Clients section.

Then click "Continue"

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # [   ] Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1862	Osbourne, Ozzy						0

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count

No matches.

Continue   Cancel

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # [   ] Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count

No matches.

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1862	Osbourne, Ozzy						0

Showing 1-1 of 1

Continue   Cancel

Adding a Returning Client to the Household

Household Members						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(400) Osbourne, Sharon	66	Yes	Self	10 / 26 / 2013	0	1
(745) Osbourne, Kelly	34	No	Daughter	11 / 01 / 2018	1	1
(1862) Osbourne, Ozzy		No	Husband	03 / 18 / 2019		1

Add/Delete Household Members   Household History Report

Set the "Relationship to Head of Household" for the newly added duplicate client. Then change or verify that the "Joined Household" date is the same as the day they re-joined the household.

Adding a Returning Client to the Household

- From the head of household's client record, go to the Entry/Exit Tab.

- Click on the pencil next to the program the client is returning to.

Edit Project Start Data - (400) Osbourne, Sharon

Household Members

ℹ️ To update Household members for this Entry Data, click the box beside each name.

☐ **(206) Two Parent Family**
    ☑ (400) Osbourne, Sharon (Entry Date: 08/27/2018 2:35 PM)
    ☑ (745) Osbourne, Kelly (Entry Date: 08/27/2018 2:35 PM)

[Include Additional Household Members]

Edit Project Start Data - (400) Osbourne, Sharon

Provider	Agency 1 (144)
Type	HUD
Project Start Date *	08 / 27 / 2018 2 ▼ : 35 ▼ : 27 ▼ PM ▼

[Save & Continue] [Cancel]

- Click on "Include Additional Household Members".

- Then check all members including the new duplicate client.

- Then click Save and Continue.

Household Members

ℹ️ To update Household members for this Entry Data, click the box beside each name.

☐ **(206) Two Parent Family**

☐ (400) Osbourne, Sharon (Entry Date: 08/27/2018 2:35 PM)

☐ (745) Osbourne, Kelly (Entry Date: 08/27/2018 2:35 PM)

☑ (1862) Osbourne, Ozzy (Entry Date: 08/27/2018 2:35 PM)

[Include Additional Household Members]

- Click on the pencil next to the newly created duplicate client who is returning.

| Provider * | Agency 1 (144) | Search | My Provider | Clear |
| Type * | HUD | Update | | |

Household Members Associated with this Entry / Exit

|		Name	Head of Household		Project Start Date		Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
🔒	📎	(400) Osbourne, Sharon	Yes	✏	08/27/2018	✏		📋	📋			
🔒	📎	(758) Osborne, Jack	No	✏	08/27/2018	✏		📋	📋			
🔒	📎	(745) Osbourne, Kelly	No	✏	08/27/2018	✏		📋	📋			
🔒	📎	(399) Osbourne, Ozzy	No	✏	08/27/2018	✏	01/07/2019	📋	📋	Disagreement with rules/persons	Hospital or other residential non-psychiatric medical facility (HUD)	
🔓	📎	(1862) Osbourne, Ozzy	No	✏	08/27/2018	✏		📋	📋			
🔒	📎	(884) Timberlake, Justin	No	✏	08/27/2018	✏		📋	📋			

| Include Additional Household Members | Showing 1-6 of 6 |
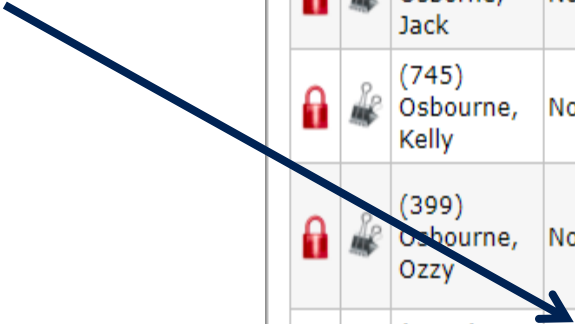
Adding a Returning Client to the Household

- Make sure that only the selected client is checked.
- Change the project start date to the date the client re-entered the project.
- Then click save and continue to fill out the HUD Assessment.
- Then click "Save &Exit"

Edit Project Start Data - (1862) Osbourne, Ozzy

Household Members

ⓘ To update Household members for this Entry Data, click the box beside each name.

☐ **(206) Two Parent Family**

   ☐ (400) Osbourne, Sharon (Entry Date: 08/27/2018 2:35 PM)

   ☐ (745) Osbourne, Kelly (Entry Date: 08/27/2018 2:35 PM)

   ☑ (1862) Osbourne, Ozzy (Entry Date: 08/27/2018 2:35 PM)

[Include Additional Household Members]

Edit Project Start Data - (1862) Osbourne, Ozzy

Provider	Agency 1 (144)
Type	HUD
Project Start Date *	03 / 18 / 2019 2 : 35 : 27 PM

[Save & Continue]   [Cancel]

Adding a Returning Client to the Household

- Go to the Households Tab and click on "Manage Household".
- Click on the right arrow and expand the "Previous Household Members".
- Click the blue undo button next to the original client record.
- Set the date Client re-joined Household to the date of project re-entry.
- Then click "Save".

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *
(400) Osbourne, Sharon	66	Yes	Self	10 / 26 / 2013
(745) Osbourne, Kelly	34	No	Daughter	11 / 01 / 2018

Add/Delete Household Members

Previous Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Left Household
(758) Osborne, Jack	33	No	Son	03/01/2014	12/07/2016
(399) Osbourne, Ozzy	70	No	Husband	03/18/2019	03/18/2019
(884) Timberlake, Justin	43	No	Other non-relative	04/16/2014	06/01/2014

Client Re-Joined Household

Please select the date the Client re-joined the Household.

Date Client re-joined Household *	03 / 18 / 2019
Head of Household	No
Relationship to Head of Household	Father

Save   Cancel

Once all of the previous steps have been completed contact your HMIS System Administrator with the First and Last Names of the duplicate client and the original Client ID and the duplicate Client ID and ask them to merge the client records.

- In Client Merge, the Sys Admin will enter the two Client IDs

- The new duplicate client should be set to the Source ID.

- The original Client ID should be set as the Destination

Create Client Comparison

Client ID for Client 1	1862
Client ID for Client 2	399
Client ID for Client 3		Client Search

Compare Clients

Duplicate Client Search

Matching Filter	○ Unique ID ○ Social Security Number ○ Both
Social Security Number	___ - ___ - ___

Search for Duplicates

Client Comparison

Selected Clients

	Unique ID	Client ID	Client Name	Social Security Number	Date of Birth	Creating Provider	Profile
⊖	oobm12031948o200o216	399	Osbourne, Ozzy	666-66-6666	12/03/1948	WellSky (0)	🔓
⊖	oob 00000000o200o216	1862	Osbourne, Ozzy			WellSky (0)	🔓

Showing 1-2 of 2

First	Middle	Last	Suffix

Adding a Returning Client to the Household

After the client merge both Entry/Exits are associated with the original client without affecting the other household members.

Deleting a Client From a Household

Deleting a Client from Household

Clients should only be deleted from households when they were added to the household in error. If the client was part of the household and left use "remove client" workflow.

To delete a client:

- Select the "Households" Tab

- Then select "Manage Household"

Deleting a Client from Household

To delete a client:

- Click on "Add/Delete Household Members"

Deleting a Client from Household

To delete a client:

Click on the trash can to the left of the client's name.

Deleting a Client from Household

Delete Household Relationship

You are about to delete the Household Relationship for:

(69) Prufrock, Wilbur J (Joined Household: 07/01/2013)

This will delete this Client's association with the Household Completely. Do you want to delete this association?

Delete   Cancel

Once the "Delete" button is clicked, the client's entire association with the household is removed.

Deleting an Entire Household

Do not ever delete an entire household. If you think that the household was created incorrectly, contact you System Administrator.

Q & A

WellSky

Thank you

Contact us: MCHSCoC HMIS Admin
Email address: hometeam@mendocinocounty.org