





How to Track Those Ever Changing Households

Agenda

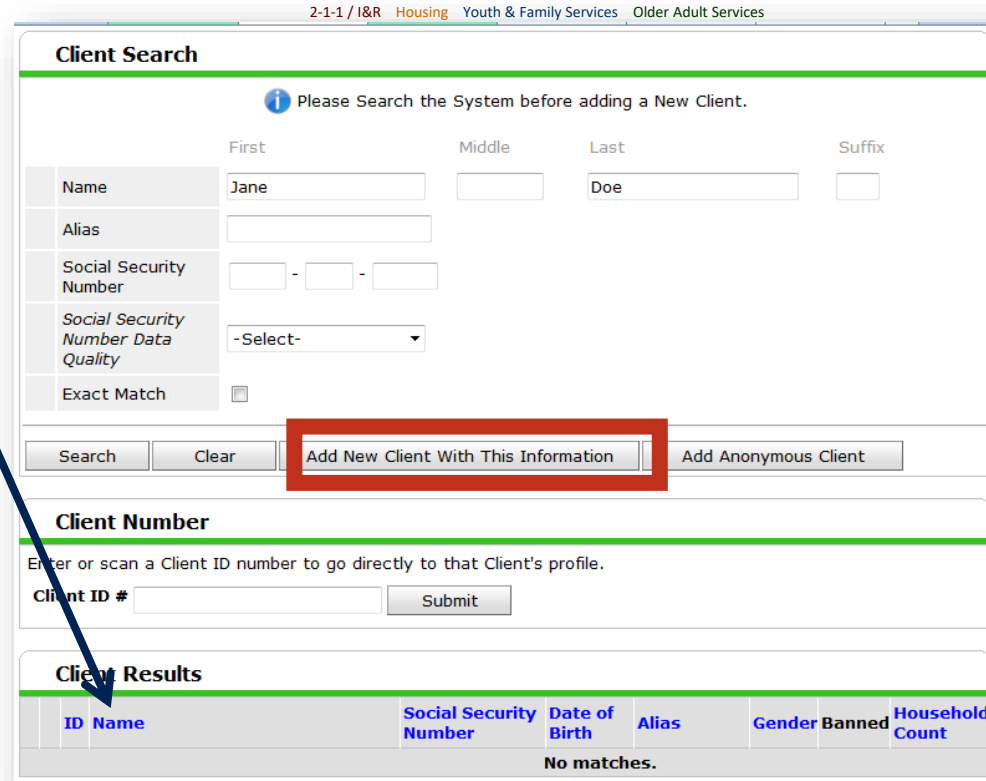
- **Creating a New Household**
- **Removing a Client From a Household**
- **Adding a New Client to an Existing Household**
- **Adding a Returning Household Member to an Existing Household**
- **Deleting a Client From a Household**

Creating a New Household

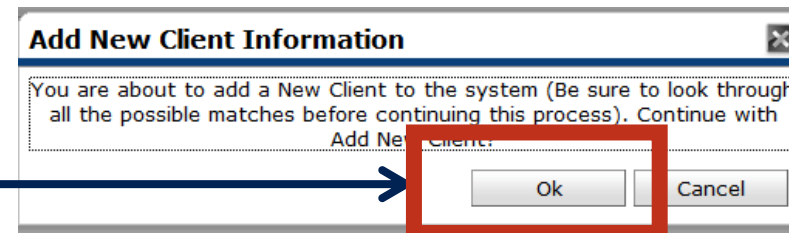
Client Profile Search / Creation

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.*



The screenshot shows the 'Client Search' interface. At the top, there is a navigation bar with '2-1-1 / I&R Housing Youth & Family Services Older Adult Services'. Below it, the 'Client Search' section has a message: 'Please Search the System before adding a New Client.' The search form includes fields for 'First' (Jane), 'Middle', 'Last' (Doe), and 'Suffix'. There are also fields for 'Social Security Number', 'Social Security Number Data Quality' (a dropdown menu), and an 'Exact Match' checkbox. At the bottom of the search form, there are four buttons: 'Search', 'Clear', 'Add New Client With This Information' (highlighted with a red box), and 'Add Anonymous Client'. Below the search form is the 'Client Number' section with a 'Client ID #' field and a 'Submit' button. At the bottom is the 'Client Results' section, which is currently empty and displays 'No matches.' with a table header containing columns: ID, Name, Social Security Number, Date of Birth, Alias, Gender, Banned, and Household Count.



The screenshot shows a warning pop-up window titled 'Add New Client Information'. The message inside reads: 'You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client:'. At the bottom of the window, there are two buttons: 'Ok' and 'Cancel', both of which are highlighted with a red box.



Select the
“Households”
Tab

Then select
“Start New
Household”

Client - (159) Bonds, Barry

(159) Bonds, Barry
Release of Information: None

Client Information | Service Transactions

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

i This Client is not currently a member of any Households.

Previous Households

Search Existing Households | **Start New Household** | Exit

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.*

Add New Household

Household Type

Household Type * -Select-

Client Search

Hide Advanced Search

Name: First, Middle, Last, Suffix

Alias

Social Security Number

Social Security Number Data Quality: -Select-

Exact Match

Search Clear Add New Client With This Information Add Anonymous Client

Client ID # Submit

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
73	Dough, Jane					0

Showing 1-1 of 1

Continue Cancel

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with

Add New Client:

Ok Cancel

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							
						<input type="button" value="Continue"/>	<input type="button" value="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

Household Information - (19) Female Single Parent

(19) Female Single Parent

Save Cancel & Exit Exit

Household Type * Female Single Parent

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
(74) Dough, Jack		No	-Select-	03 / 12 / 2012	0	1
(73) Dough, Jane		No	-Select-	03 / 12 / 2012	0	1
(75) Dough, Jill		No	-Select-	03 / 12 / 2012	0	1

Add/Delete Household Members

Previous Household Members

This Household does not have any previous members.

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

Individual Client Assessment

Household Members

- (74) Dough, Jack
Age: 3
- (73) Dough, Jane
Age: Unknown
- (75) Dough, Jill
Age: Unknown

Client Record

Name: Dough, Jack

Alias:

Social Security:

SSN Data Quality:

Age:

HUD Universal Data Elements

Required of All Clients.
Name and SSN recorded elsewhere.

Date of Birth: 02 / 12 / 2009

Date of Birth Type: Full DOB Reported (HUD)

Gender: -Select-

Primary Race: -Select-

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.

Name	First	Middle	Last	Suffix
	Pet		Ros	
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
Exact Match	<input type="checkbox"/>			

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
82	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.

The screenshot shows a client record for Pete Rose, III. The interface includes a header with the client name and a lock icon, a yellow banner with client details and a date, and a navigation bar with tabs for Client Information and Service Transactions. The Entry/Exit tab is selected and highlighted with a red box. Below the navigation bar is a reminder message. The main content area features a table with columns for Program, Type, Entry Date, Exit Date, Interims, and Follow Up Count. The Exit Date column for the first row contains a pencil icon, which is also highlighted with a red box. A blue arrow points from the text on the left to this pencil icon. At the bottom of the table, there is an 'Add Entry / Exit' button and a 'Showing 1-1 of 1' indicator.

Program	Type	Entry Date	Exit Date	Interims	Follow Up Count
Bob's Men's Shelter (20)	HUD	10/01/2013			

Removing a Client from Household

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

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

Household Members

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

(258) Male Single Parent

- (7) Rose, Pete
- (8) Rose, Pete, III
- (8) Rose, Pete, Jr

Make sure that the exit date is the correct date.

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-

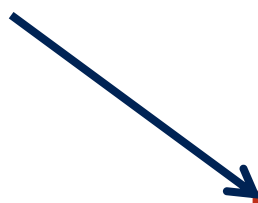
Answer the "Reason for Leaving" and "Destination".

Then click "Save & Continue"

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.

Client - (112) Kardashian, Kim

(112) Kardashian, Kim Date: 10/01/2013 8:00:00 AM
Release of Information: Ends 07/01/2014 -Switch to Another Household Member- Submit

Client Information Service Transactions

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

▼ (32) Two Parent Family

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(112) Kardashian, Kim	32	No		07/01/2013	0	1
(114) West, Kanye	36	No		07/01/2013	0	1
(118) West, Kim	0	No		07/01/2013	0	1

Manage Household

- 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
(115) 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

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
(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!

Client - (112) Kardashian, Kim

(112) Kardashian, Kim Date: 10/01/2013 8:00:00 AM
Release of Information: Ends 07/01/2014 -Switch to Another Household Member- Submit

Client Information Service Transactions

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

▼ (32) Two Parent Family

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(112) Kardashian, Kim	32	No		07/01/2013	0	1
(114) West, Kanye	36	No		07/01/2013	0	1
(118) West, Kim	0	No		07/01/2013	0	1

Manage Household

- Select the “Households” Tab
- Then select “Manage Household”

Adding a new Client to the 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

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.

Add Clients to the Household

Client Search

Please Search the System before adding a New Client. [Hide Advanced Search](#)

Name	First	Middle	Last	Suffix
	<input type="text" value="Kourtney"/>	<input type="text"/>	<input type="text" value="Kardashian"/>	<input type="text"/>
Alias	<input type="text"/>			
Social Security Number	<input type="text" value="444 - 44 - 4444"/>			
Social Security Number Data Quality	<input type="text" value="Full SSN Reported (HUD)"/>			
Exact Match	<input type="checkbox"/>			

Client Number

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

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
<input type="checkbox" value=""/>	76	Aulick, Candace	***-**-4444	1964		Female	1

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
<input type="checkbox" value=""/>	116	Kardashian, Kourtney	***-**-4444				0

Showing 1-1 of 1

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"

The screenshot shows a software interface for managing household information. The title bar reads "Household Information - (32) Two Parent Family". The interface is divided into several sections:

- Household Information:** Shows "Household Type" as "Two Parent Family" and "Income" as "US\$800.00".
- Household Members:** A table listing household members with columns for Name, Age, Head of Household, Relationship to Head, Joined Household, Previous Associations, and Household Count.

Name	Age	Head of Household	Relationship to Head	Joined Household	Previous Associations	Household Count
(112) Kardashian, Kim	32	Yes	Self	07 / 01 / 2013	0	1
(116) Kardashian, Kourtney		No	-Select-	08 / 01 / 2013	0	1
(69) Prufrock, Wilbur J		No	-Select-	07 / 01 / 2013	0	2
(114) West, Kanye	36	No	son	07 / 01 / 2013	1	1
(113) West, North	0	No	daughter	07 / 01 / 2013	0	1
- Individual Client Assessment:** A section for assessing each household member. It lists the members with checkboxes:
 - (112) Kardashian, Kim (Self, Age: 32)
 - (116) Kardashian, Kourtney (Age: Unknown)
 - (69) Prufrock, Wilbur J (Age: 51)
 - significant other, Age: 36
 - (113) West, North (daughter, Age: 0)
- Client Record:** Shows details for Kourtney Kardashian, including Social Security (444-44-4444) and SSN Data Quality (Full SSN Reported (HUD)).
- Client Household Basic Assessment:** A form for assessing the client's household, including fields for Date of Birth, Gender, Race, Ethnicity, and Disabilities.
- MONTHLY INCOME:** A table for recording monthly income with columns for Start Date, End Date, Source of Income, and Amt of Last 30 Day Income.
- Non-Cash Benefits:** A table for recording non-cash benefits with columns for Source of Non-Cash Benefit, Start Date, and End Date.

Annotations in the image include:

- A red box around the "Household Type" dropdown menu.
- A red box around the "Relationship to Head" dropdown menu in the Household Members table.
- A red box around the checkboxes for the newly added clients in the Individual Client Assessment section.
- A red box around the "Save & Exit" button at the bottom right.

Adding a new Client to the Household

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

Client - (112) Kardashian, Kim

(112) Kardashian, Kim Date: 08/15/2013 8:00:00 AM
Release of Information: Ends 07/01/2014 -Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile Household Information **Entry / Exit** Case Managers Case Plans SSOM Activities Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Family Promise - Bowman Training TH (2223)	HUD	07/01/2013				

Add Entry / Exit Showing 1-1 of 1

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

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

Adding a new Client to the Household

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 ▼
<input type="button" value="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						

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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

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

- (32) Two Parent Family
 - (12) Kardashian, Kim (Entry Date: 07/01/2013 8:00 AM)
 - (278) Kardashian, Khloe (Entry Date: 07/01/2013 8:00 AM)
 - (156) Kardashian, Kourtney (Entry Date: 08/15/2013 8:00 AM)
 - (14) West, Kanye (Entry Date: 07/01/2013 8:00 AM)
 - (13) 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

Adding a new Client to the Household

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..

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

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

i 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, Courtney (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".

Adding a new Client to the Household

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
	(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

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




Adding a
Returning Client
to the
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.



Adding a
Returning Client
to the
Household

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

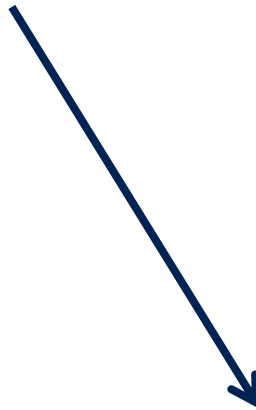
Manage Household

► 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 *

Income

Client Count

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**

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	<input type="checkbox"/>			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 #

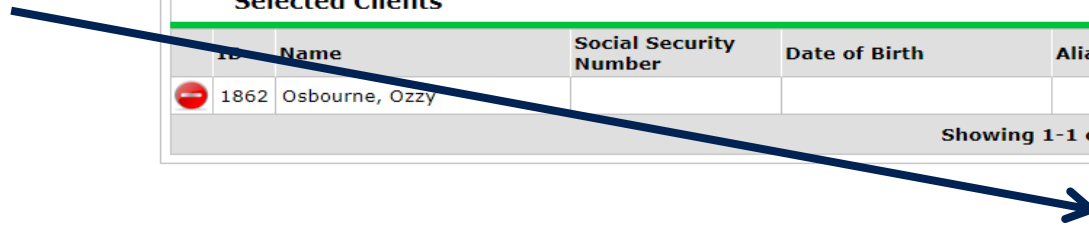
Client Results

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.							



Client Number



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

Client ID #

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

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			0	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.

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

Client Information Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Bob's Single Adult Shelter (SN) (399)	HUD	08/31/2018	09/01/2018			3
Agency 1 (144)	HUD	08/27/2018				5
Bob's Men's Shelter (20)	HUD	08/08/2018	09/01/2018			3
Bob's Single Adult Shelter (SN) (399)	HUD	01/12/2018	02/01/2018			2
Bob's Call Center (22)	HUD	12/08/2016	04/16/2019			3
Rookie Bootcamp Shelter - Men's Shelter - ES - BC2016JMO (405)	HUD	05/04/2016	06/03/2016			3
WellSky (0)	HUD	04/20/2016	08/16/2017	1		4

Add Entry / Exit Showing 1-7 of 7

Adding a
Returning Client
to the
Household

- Click on “Include Additional Household Members”.
- Then check all members including the new duplicate client.
- Then click Save and Continue.

Edit Project Start Data - (400) Osbourne, Sharon

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)

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**

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

Adding a Returning Client to the Household

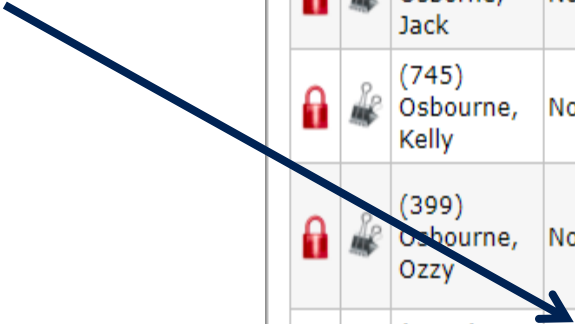
- Click on the pencil next to the newly created duplicate client who is returning.

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

i 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

Adding a Returning Client to the Household

- 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

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.

Create Client Comparison

Client ID for Client 1	<input type="text" value="1862"/>	
Client ID for Client 2	<input type="text" value="399"/>	
Client ID for Client 3	<input type="text"/>	<input type="button" value="Client Search"/>
<input type="button" value="Compare Clients"/>		

Duplicate Client Search

Matching Filter	<input checked="" type="radio"/> Unique ID <input type="radio"/> Social Security Number <input type="radio"/> Both
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>
<input type="button" value="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.

(399) Osbourne, Ozzy
Release of Information: **Expired** -Switch to Another Household Member- Sub

Client Information Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency 1 (144)	HUD	03/18/2019				6
Bob's Single Adult Shelter (SN) (399)	HUD	08/31/2018	09/01/2018			3
Agency 1 (144)	HUD	08/27/2018	01/07/2019			6
Bob's Men's Shelter (20)	HUD	08/08/2018	08/09/2018			3
Bob's Single Adult Shelter (SN) (399)	HUD	01/12/2018	02/01/2018			

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”

Client - (112) Kardashian, Kim

(112) Kardashian, Kim Date: 07/01/2013 8:00:00 AM
Release of Information: Ends 07/01/2014 -Switch to Another Household Member- Submit

Client Information Service Transactions

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

▼ (32) Two Parent Family

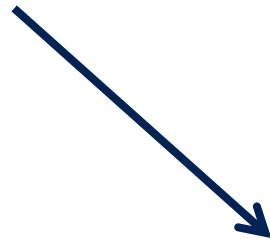
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(112) Kardashian, Kim	32	Yes	Self	07/01/2013	0	1
(69) Prufrock, Wilbur J	51	No		07/01/2013	0	2
(114) West, Kanye	36	No	significant other	09/30/2013	1	1
(118) West, N. N.	0	No	daughter	07/01/2013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

Manage Household

Deleting a Client from Household

To delete a client:

- Click on “Add/Delete Household Members”



Household Information - (32) Two Parent Family

(32) Two Parent Family

Save

Save & Exit

Exit

Household Type *

Two Parent Family

Income

US\$800.00

Client Count

4

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	-Select-	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

Add/Delete Household Members

Household History Report





▶ Previous Household Members

Deleting a Client from Household

To delete a client:

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

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	
(6) Prufrock, Wilbur J	51	No		07/01/2013	0	2	
(14) 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

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 a Client
from Household

Deleting an Entire Household

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

Q & A



Thank you

Contact us: MCHSCoC HMIS Admin

Email address: hometeam@mendocinocounty.org