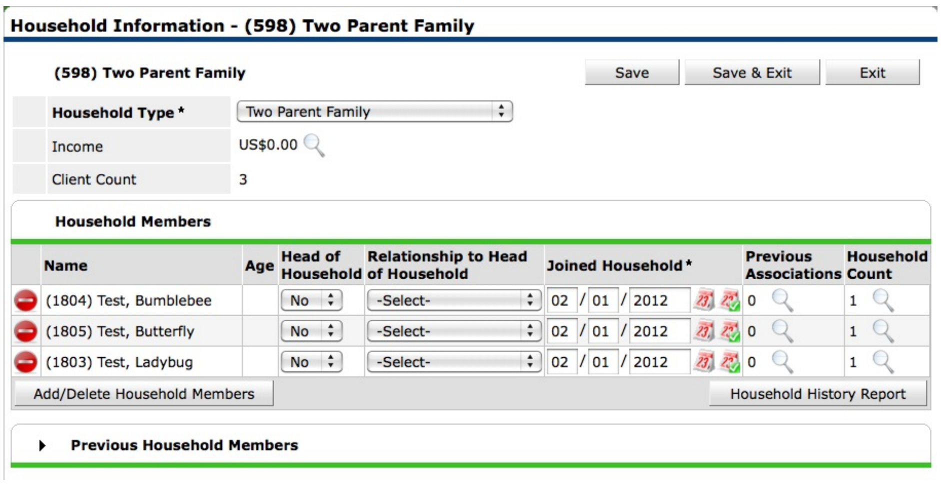
Managing Household in Service Point 5

Note: The initial step for client data entry must be done prior to adding Household Members.

Note: Click "**Back Date**" function (upper right hand corner) if entering data from a previous date, then:

- Change the date to the information date.



Getting to the Household Information Screen

1. From Client Profile click on "Households" under the Client Information Tab.
    a. Click "Manage Household" under the names of the members. (The "Household Information" screen will pop-up.

Add Existing Client to Existing Household

2. In the "Household Information" screen
    a. Click "Add/Delete Household Members"
    b. Click the ▶ icon next to the "Add Clients to the Household" Section to search for clients.
    c. **Existing Clients**
        i. Enter the client's First and/or Last Name and SS#
            1. Click the icon.

               or
            2. Enter the **Client's ID#** if known.
                a. Click "Submit"
                    i. Repeat if needed.
    d. **New Client**
        i. Enter the client's First Name, Last Name and SS# and SS Quality
            1. Click "Add New Client"
                a. Repeat if needed.
    e. Once all NEW Household Members are entered/selected, Click "Continue"

Note: Clients selected (or added) will appear at bottom of screen in the "Selected Clients" Section

i. Make sure the "HoH", "Relationship to HoH", and "Joined Household" is correct. **<u>There should only be 1 Head of Household!</u>**

            1. Click "Save"
        ii. Complete the "Individual Client Assessment" for all individuals.
            1. Click "Save and Exit" This will close the "Household Information" screen

Removing a Client from Household

3. Enter the "Household Information" screen.
    a. Click the "Red Minus" icon next to the client who is leaving.
        i. Enter the "Date Client Left Household"
            1. Click "Save"

Note: This client will now be located under the "Previous Household Members" section, and can be reactivated if need be. (See Re-joining a Household)

a. Click "Save and Exit" to leave the Household Information screen.

Deleting a Household Relationship

4. Enter the "Household Information" screen.
    a. Click "Add/Delete Household Members"
    b. Click the "Trash Can" icon next to the HH member who is to be deleted.
    c. This will delete this Client's association with the Household Completely. (This client will **NOT** be located under the "Previous Household Members" section.)
        i. Click "Continue"
            1. Click "Save and Exit" to leave the Household Information screen.

Previous Associations will increase by 1 each time a client leaves a Household. Click the "Magnifying Glass" icon to display activity

Household Count represents the number of households in which the client is currently associated. Click the "Magnifying Glass" icon to display activity.

The **Household History Report** button will display activity for adding/ editing/ deleting Household members.