Adding a Family Members to a Household

As a best practice, family members should be added to a client's household when the Head of Household's (HoH) initial HMIS record is created. This occurs simultaneously with the HoH's first intake assessment.

However, there are scenarios where a family member may need to be added to household after the initial record creation of the HoH:

- If the family member is a newborn or new addition to the household
- If the HMIS user accidentally forgot the family member and needs to add them post-intake

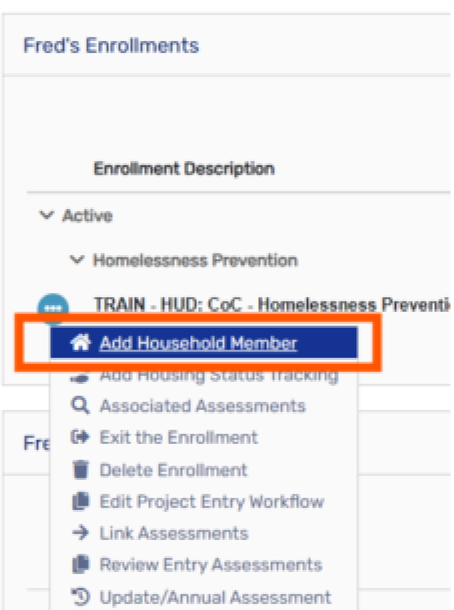
Note that if the family member will be participating in your program and receiving any services, they should be added to the project enrollment with their own project start date.

- If this is a new child or other new addition to the family, their project start date should not necessarily match the HoH's project start date.
- If this family member is being added to correct an error and did start receiving services at the same time as the HoH, their project start dates should be the same.

Add a Family Member

1. Log into ClientTrack and navigate to your Clients Workspace. Find your Head of Household (HoH) in the system.

2. From the HoH's Dashboard, select the Action Buttons (three dots) next to the enrollment, and select Add Household Member.



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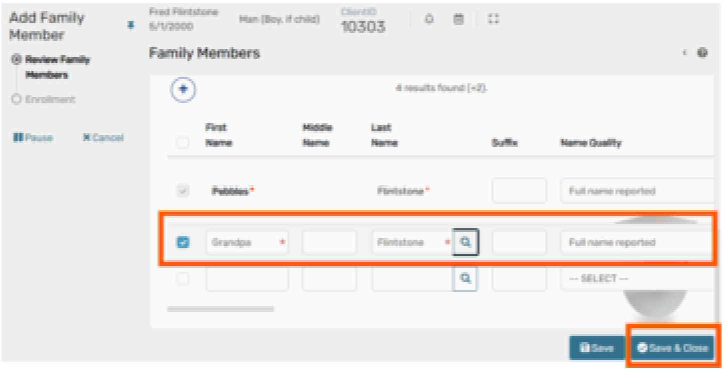
3. Select an open slot and input the name of the new family member.



4. Search for the family member to ensure you are not creating a duplicate client, using the first 3 letters of the client's first and last name.

5. Enter the client's basic information, then click Finish. Be sure to complete all required fields per the HMIS Data Standards.

6. Select the new family member by checking the box next to their name. Proceed through the enrollment screens and save the new family member's selections.