

# Household Addendum SP5.12

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- ! The initial steps for client data entry must be done prior to adding Household Members. Please refer to your **workflow**.
- ! Utilize **Enter Data As** function if not already in the correct program
- ! **EVERYONE** in HMIS has a household, even a single person.

## Creating a new Household

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1. Click the **Household Tab**
2. If there is no household, click **Start New Household**

**IF THERE IS ALREADY A HOUSEHOLD THERE – USE IT!**

There are **VERY FEW** situations you would ever create more than one household.

If there is more than one household – contact the HMIS Help Desk for guidance.

[www.dupageco.org/HMISHelp](http://www.dupageco.org/HMISHelp)

3. Select the **Household Type**
4. Locate existing or Add new HH member
  - a. Enter the client’s partial First and/or partial Last Name
    - Existing Client: Click the **Green Plus** sign from the results list.
    - Existing Client: Enter the **Client’s ID** if it has been established and is known
  - b. Add a new client if not located through search. Warning message will appear
    - Clients selected (or added) will appear at bottom of screen
  - c. Continue Step 4a until all HH members have been added (or selected).
  - d. Click **Continue**
5. Answer: **Head of Household** (Yes or No), **Relationship to HoH** (if HoH, *Self* will auto-fill), **Joined Household** (if different than data entry date)
  - a. **There should only be 1 Head of Household!**
6. Forget to add information regarding the Social Security number from Step 4? (This information can be entered in real time or backdate mode.)
  - a. Click on the **Edit** pencil next to the **Client Record** section and enter data. Click **Save**.
    - On the left hand side, select another HH members name to switch. The active client is highlighted in blue. See step 6a.
    - When finished, click on the HoH record, as a regrouping aspect. Click **Save & Exit** (this will close the HH window). Warning message will appear
7. Forgot something? Made a mistake? Click **Manage Household** button to edit/revise.

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## Adding new Clients to an existing HH

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1. Click **Manage Household**
2. Click **Add/Delete Household Members**
3. Click arrow ► **Add Clients to the Household** section. Screen expands.
  - a. See Step 4 and 5 for instructions.
    - If **Joined HH** is different than original HH members, update these fields.

## If a Client Leaves the Household

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1. Click **Manage Household**
2. Click the **Red Minus** sign next to the client who is leaving.
3. Enter the **Date Client Left Household**. Click **Save**.
  - a. This client will now be located under the ► **Previous Household Members** section and can return (or be reactivated) to the HH if need be.
    - If reactivated, complete questions from the pop-up window. Click **Save**.
4. Click **Save & Exit** to close HH window. Warning message will appear

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

**Previous Associations** will increase by 1 each time a client leaves a HH. Click the **View** icon to display activity

**Household Count** represents the number of households in which the client is currently associated. Click the **View** icon to display activity.