

# CREATING A HOUSEHOLD (HH)

## 1. SEARCH FOR HEAD OF HOUSEHOLD

**Client Search**

Please Search the System before adding a New Client.

*Items in Italics are for Data Entry ONLY and will not be used for Search Res*

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number	- - -			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

Date of Birth	/ /
DOB Data Quality	-Select-
Gender	-Select-
Primary Race	-Select-
Secondary Race	-Select-
Ethnicity	-Select-

Search   Clear   Add New Client With This Information   Add Anonymous Client

Click on ClientPoint. Enter first and last name, name data quality, social security number, social security number data quality, and veteran status. Middle initial, suffix and alias are optional. Click search. If no client shows up, click “Add New Client with this Information.”

The Client Results will populate after the user clicks search. If you find your client in the results, verify that the name is spelled correctly and that both the Social Security Number and Date of Birth match.

## 2. HOUSEHOLD TAB

### A) NEW HOUSEHOLD

Once the client has been located or has been added as a new client, the User will move to the Household Tab. Click “Start New Household.” A new window will open. Select “Household Type.” Enter first and last name, name data quality, social security number, social security number data quality, and veteran status of the client’s household member. Click “Search.” If the client already exists select the client otherwise click “Add New Client with This Information”. Repeat this step until all household members have been added. Click “Continue.”

Enter the relationship to the Head of Household. The Head of Household should be labelled as “Self”

### B) EXISTING HOUSEHOLD

A household may already exist, if you need to add a client to the household. To do this click “Start New Household”. Search for the clients that you are serving in your program.

▼ (2957) Couple without children

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(15459) Doe, John	53	Yes	Self	08/10/2009	0	1
(42022) Doe, Alice	7	No	daughter	08/19/2015	0	1
(15462) Doe, Jane	57	No	wife	08/11/2009	0	1
(69765) Doe, Johnny C C		No		07/12/2016	0	1

Manage Household

► Previous Households

Search Existing Households   Start New Household   Exit

# ADDING CLIENT FROM HOUSEHOLD TO EXISTING ENTRY/EXIT

## HOUSEHOLD EXAMPLE

(26935) Female with children						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(66591) Doe, Jan Test	26	Yes	Self	01/13/2016	0	1
(15459) Doe, John	50	No	significant other	01/13/2016	0	4
(15463) Doe, Johnny	16	No	son	01/13/2016	0	1

Manage Household

## JOHNNY DOE ACCIDENTALLY LEFT OUT OF ENTRY/EXIT

**Edit Entry Data - (15459) Doe, John**

**Household Members**

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

(26935) Female with children

(66591) Doe, Jan Test (Entry Date: 02/01/2016 10:09 PM)

(15459) Doe, John (Entry Date: 02/01/2016 10:09 PM)

Include Additional Household Members

**Edit Entry Data - (15459) Doe, John**

Provider: PADS - Program (627)

Type: HUD

Entry Date\*: 02 / 01 / 2016 10 : 09 : 33 PM

1. SEARCH FOR CLIENT IN EXISTING HH WITH AN ENTRY/EXIT  
(FOR EXAMPLE: SEARCH FOR JAN TEST DOE OR JOHN DOE)

**Client Search**

Please Search the System before adding a New

Items in *Italics* are for Data Entry ONLY and will not be used

Name:  First:  Middle:  Last:

2. LOCATE CORRECT ENTRY/EXIT THAT YOU WANT TO ADD CLIENT TO CLICK PENCIL NEXT TO ENTRY DATE.

**Client - (15459) Doe, John**

(15459) Doe, John  
Release of Information: None

Client Information | Service Transactions

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

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

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
PADS - Program (627)	HUD	02/01/2016				

3. THE FOLLOWING WINDOW WILL APPEAR. NOTICE THAT THE HOUSEHOLD IS MISSING JOHNNY DOE.

TO ADD JOHNNY DOE, SELECT THE “INCLUDE ADDITIONAL HOUSEHOLD MEMBERS” BUTTON.

**Edit Entry Data - (15459) Doe, John**

**Household Members**

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

- (26935) Female with children
- (66591) Doe, Jan Test (Entry Date: 02/01/2016 10:09 PM)
- (15459) Doe, John (Entry Date: 02/01/2016 10:09 PM)

**Include Additional Household Members**

**Edit Entry Data - (15459) Doe, John**

Provider	PADS - Program (627)
Type	HUD
Entry Date*	02 / 01 / 2016 10 : 09 : 33 PM

Save & Continue Cancel

4. TO ADD ADDITIONAL HOUSEHOLD MEMBERS, SELECT THE BOX BY HOUSEHOLD ID, THIS WILL SELECT EVERYONE IN THE HOUSEHOLD, OR CHECK THE BOX NEXT TO THE FORGOTTEN CLIENT’S NAME. SELECT CONTINUE.

**Include Additional Household Members**

**Household Members**

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

- (26935) Female with children
- (66591) Doe, Jan Test
- (15459) Doe, John
- (15463) Doe, Johnny

Continue Cancel

**Option 1:**  
Household ID to select entire household.

**Option 2:**  
Select the box by the individual Client’s Name to include specific clients.

5. AFTER YOU SELECT "CONTINUE" THE FOLLOWING WINDOW WILL APPEAR, AND IT WILL SHOW THE CORRECT HOUSEHOLD, ENTRY DATE, AND CLIENT NAMES.

(FOR EXAMPLE: JOHNNY DOE HAS BEEN ADDED TO THE LIST OF HOUSEHOLD MEMBERS FOR THE PADS-PROGRAM (627) ENTRY DATE OF 2/01/2016)

**Edit Entry Data - (15459) Doe, John**

Household Members

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

- (26935) Female with children
- (66591) Doe, Jan Test (Entry Date: 02/01/2016 10:09 PM)
- (15459) Doe, John (Entry Date: 02/01/2016 10:09 PM)
- (15463) Doe, Johnny

Include Additional Household Members

**Edit Entry Data - (15459) Doe, John**

Provider	PADS - Program (627)
Type	HUD
Entry Date *	02 / 01 / 2016 10 : 09 : 33 PM

Save & Continue Cancel

6. SELECT "SAVE & CONTINUE" AND THE ENTRY/EXIT SHOULD NOW SHOW THE CORRECT HOUSEHOLD MEMBERS.

**Household Members**

- (66591) Doe, Jan Test  
Age: 26  
Veteran: No (HUD)
- (15459) Doe, John  
Age: 50  
Veteran: No (HUD)
- (15463) Doe, Johnny  
Age: 16  
Veteran: Unknown

# HOUSEHOLD DATA SHARING ON ENTRY/EXIT

## HOUSEHOLD EXAMPLE

Summary	Client Profile	<b>Households</b>	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments
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▼ (35) Couple with children							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count	
(97) Green, Lisa	18	Yes	Self	02/01/2016	0	1	1
(98) Green, Frankie	4	No	son	02/01/2016	0	1	1
(96) Green, Sam	17	No	father	02/01/2016	0	1	1

Manage Household

1. SELECT A CLIENT’S PROFILE FROM THE CHOSEN HOUSEHOLD AND GO TO THE ENTRY/EXIT TAB.

(FOR EXAMPLE: LISA GREEN’S PROFILE PAGE CLIENT ID 97)

**Client - (97) Green, Lisa**

(97) Green, Lisa  
Release of Information: None

Client Information | Service Transactions

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

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

Program	Type	Entry Date	Exit Date	Interims	Follow Ups
PADS - Program (627)	HUD	02/01/2016			

Add Entry / Exit

Showing 1-1 of 1

2. SELECT THE “ADD ENTRY/EXIT” BUTTON TO ADD A NEW ENTRY/EXIT FOR THIS CLIENT AND THEIR FAMILY.

Program	Type	Entry Date	Exit Date	Interims	Follow Ups
PADS - Program (627)	HUD	02/01/2016			

**Add Entry / Exit**

Showing 1-1 of 1

- THE FOLLOWING WINDOW WILL APPEAR. SELECT THE BOX BY HOUSEHOLD ID, THIS WILL SELECT EVERYONE IN THE HOUSEHOLD, OR CHECK THE BOX NEXT TO THE FORGOTTEN CLIENT'S NAME. THEN SELECT CONTINUE.

**Entry Data - (97) Green, Lisa**

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(35) Couple with children

- (97) Green, Lisa
- (98) Green, Frankie
- (96) Green, Sam

**Entry Data - (97) Green, Lisa**

- SELECT THE CORRECT PROVIDER NAME, ENTRY TYPE, AND ENTRY DATE. THEN SELECT "SAVE & CONTINUE".

**Entry Data - (97) Green, Lisa**

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(35) Couple with children

- (97) Green, Lisa
- (98) Green, Frankie
- (96) Green, Sam

**Entry Data - (97) Green, Lisa**

**Provider\*** Lake County Haven - Housing Stage 1 (682)

**Type\*** HUD

**Entry Date\*** 02 / 01 / 2016 11 : 38 : 34 PM

- THE FOLLOWING WINDOW WILL APPEAR. BEFORE ENTERING ANY INFORMATION FOR THIS HOUSEHOLD, SELECT THE "ADD HOUSEHOLD DATA" BUTTON ON THE TOP RIGHT CORNER OF THE ASSESSMENT.

**Household Members**

- (97) Green, Lisa  
Age: 18  
Veteran: No (HUD)
- (98) Green, Frankie  
Age: 4  
Veteran: No (HUD)
- (96) Green, Sam  
Age: 17

**Household Data Sharing**

**Client:** (97) Green, Lisa

**Entry #1** Entry Date: 02/01/2016 11:38:34 PM

**Required of All Clients**

Date of Birth: 02 / 01 / 1998

6. MAKE SURE TO CHECK OFF ALL THE NAMES OF THE CLIENTS THAT WILL BE SHARING THIS SAME DATA AT THE TOP OF THE PAGE.

**Household Data Sharing**

**Household Members**

To include Household members for this Household Assessment, click the box beside each name. Only members from the SAME Household may be selected.

(35) Couple with children

(97) Green, Lisa

(98) Green, Frankie

(96) Green, Sam

**Household Data Sharing** Date: 02/01/2016 11:38:34 PM

**Required by HUD on Entry**

In Permanent Housing  Yes  G

If yes, Date of Move-In  /  /

**Required by HUD on Exit**

Housing Assessment at Exit

7. THEN FILL OUT ALL APPLICABLE QUESTIONS FOR THE HOUSEHOLD UNDER THE “HOUSEHOLD DATA SHARING” SECTION AND SELECT “SAVE & EXIT.”

ALL QUESTIONS THAT ARE NOT SUB-ASSESSMENTS WILL NOW SHOW FOR ALL SELECTED CLIENTS.

**Contacts / Emergency Contacts**

Contact's Name	Email Address	Phone Number	Second Phone Number	Relationship to Client
Santa Claus	kriskringle@gmail.com			Friend

Add

Showing 1-1 of 1

Save **Save & Exit** Exit

**Note: Household Data Sharing does not work with Sub-Assessments, such as the “Contact/Emergency Contacts” or “Client’s Residence” section as of right now. This will have to be manually entered for each client or at least the head of household.**

Sub-Assessments can be identified as sections within an Assessment that include an “Add” button and can collect changing information at different times such as income, addresses, and contact information.