

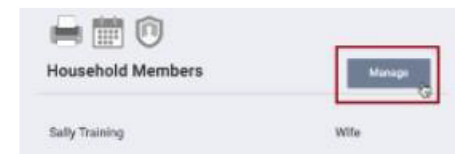
How to Create Households and Manage Household Members

Types of Households

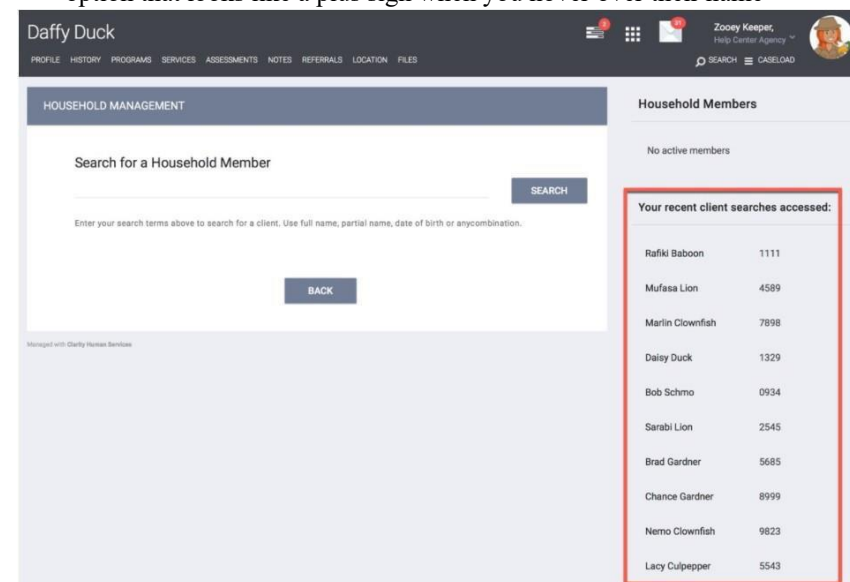
- **Head of Household:** data collection is limited to the head of household. Head of household is the term used in these data standards for consistency with other guidance previously developed and does not necessarily indicate the individual's status in the household. CoCs and HMIS Lead Agencies may elect to further define the head of household for their jurisdiction or they may also substitute the concept of "primary client" for the term.
- **Head of Household and Adults:** data must be collected from the lead of the head of household and each additional adult in the household. If the household is composed of an unaccompanied child then that child is the head of household. If the household is composed of two or more minors, data must be collected about the minor that has been designated as the head of household. Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 may be provided by the head of household who is applying for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the project on the same day as the head of household. Information for these children should only be recorded when the children join the project. Information on any other adults (18 years of age or older) who are enrolled in the project as part of the household should be obtained directly from that adult. As a general rule, one adult should not provide information for another adult. A project should edit the project entry record of a client who turns 18 after entry, but before exit, add a response for data elements only relevant to the head of household and other adults in the household in order to improve the reported overall data quality for the project or if required by a funder.
- **All Clients:** data must be collected about each adult and child in a household.

Creating Households and Managing Household Members

1. Verify that each Household member profile exists in the HMIS. If they do not exist, complete the steps for "**Adding a New Client**" to create a profile for each Household member.
2. Open the profile for the "Head of Household," in this example, Client X. In the upper-right corner, under the header "Household Members," select **Manage**.

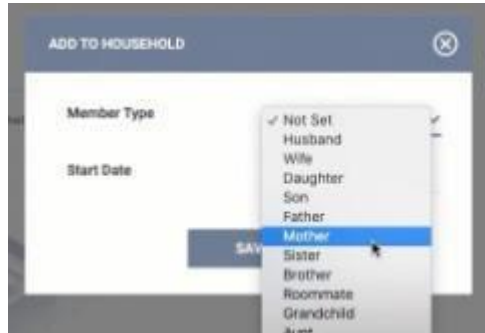


3. Your 10 most recently accessed clients will appear on the right side of the screen. Generally, Household members are added to the system sequentially, therefore, they will likely be listed here. If the Household members are not listed, search for them in the search bar. Clients that are not currently members of any Household will be listed with the Add option that looks like a plus sign when you hover over their name



How to Create Households and Manage Household Members

4. Select the plus icon. This will display a window requesting Member Type and Start Date.



5. Select the Member Type from the dropdown menu, select a start date, and then select Save. This client will be added to the Household.
 - a. You may notice that some clients under your recent searches have a join icon rather than a plus icon. This means that the client is already a member of a different household. A client cannot be a member of two distinct Households at the same time. You will need to choose a Household for the client.
 - b. When you select Join, a pop-up will appear with the options:
 - i. Leave existing Household and join current client's Household
 - ii. Transfer client from their existing Household to this Household
 - c. A popup box will appear. Check the Exited Household box and in the End Date field, enter the date and save. The client will be a household member until that date.
 - i. **This will remove them from the Household and retain a historical record of their time in the group.**

EDIT GLOBAL HOUSEHOLD

Member Type

Son

Head of Household

Walter White

Joined Household

05/02/2024

Exited Household

☒

08/23/2024

SAVE