WORKING WITH HOUSEHOLD COMPOSITION

The AWARDS **Household Composition** feature enables users to fully manage household changes, including adding, editing, or removing household member information in client records.

Accessing the Household Composition Feature:

The Household Composition feature can be accessed in two ways within AWARDS:

- By clicking the Household Info button on a client's face sheet in the Profile module

- By completing a new admission in a program set to display the Household Info button on client face sheets

To view the Household Composition feature:

If you are NOT completing a new client admission and will be accessing the Household Composition feature from a client's face sheet, click **Profile** from the *AWARDS Home* screen. The *Client/Program Profile* page is displayed. Proceed to step 1.

If you ARE completing a new client admission, you will be redirected to the Household Composition form for the client upon saving the admission record. You will be asked to create a new household for the client being admitted, or to join them into an existing household. Once the household is created, skip to the next page.

1. Click the **Program** drop-down arrow and select the program associated with the client whose household information form is to be viewed.

2. Click the **Database** mode drop-down arrow and select "Data Entry."

3. To limit face sheet selection by client name, click the **A-Z** drop-down arrow and select the client's last name initial. An asterisk (*) in this field will include all clients in the face sheet selection process.

4. If the household information form to be viewed is for a former (discharged) client, click the **Roster Archives** radio button.

5. Click **Face Sheet**. The *Client Profile / Face Sheet Update Selection* page is displayed.

6. Click the **Client** drop-down arrow and select the client whose household information form is to be viewed.

7. Click **CONTINUE**. The *Client Face Sheet* page is displayed.

8. Click Household Info. The Household Composition page is displayed.

By default, the *Household Composition* page opens with the "Household Program History" tab displayed, and lists the current household members (as of today's date).

Adding a New Household Member

This procedure adds a new household member to an existing household; for example, if a child joins the household of a mother.

If the new household member will also be admitted as receiving services at an agency program, adding him or her to the household should be done through the Household Info form of the existing household member's face sheet. Household members that will not be admitted into an agency program must be added through the Household Info form of the existing household member's face sheet.

1. Access the Household Composition feature of the client for which you are adding a household member.

2. Click the **Household Composition** tab. The page is refreshed to display all current household members.

3. Click **Add New Household Member**. The *Household Search* page is displayed.

When adding a new household member to an existing household, AWARDS first prompts users to search for a client record that matches that of the household member. If they have been a client of the agency in the past, less data entry is required.

4. In the First Name, Last Name, and SSN fields, type identifying information for the household member being added to the household. For example, you may enter the first two letters of the household member's first and last names.

5. Click CONTINUE. The Household Search Results page is displayed. This page contains a list of clients with records in the system for whom the identifying information entered on the previous page is a match.

6. Review the search results and determine if the household member to be added to the household appears on the list of matches. If he or she is listed, click the radio button to the left of the name, and continue with step 9. If the household member to be added does not appear on the list of matches, continue with step 8.

   Clients that appear with the following red icon next to their name already belong to a household within the agency. As a rule, AWARDS only allows a client to be active in one household at a time.

   To see the details of the household to which the client belongs, click the red icon next to his or her name, and the Household Composition *page for that household is displayed in a pop-up window over the search results page. From there, you can choose to* **Edit Household Composition** *of that household or* **Close***.*

First Name	Last Name	Program History(s)	SSN	Date of Birth	Gender
⚠ Joe	Black	Transitional Housing One - 04/15/2011	314-90-4284	08/07/1980	Male
Bob	Black	PROS Full Service - 12/01/2005	999-99-9999	01/01/1980	Male
⚠ Joe	Black	Transitional Housing One - 06/15/2010 to 06/15/2010 Emergency Shelter Program - 06/15/2010 to 06/15/2010	314-90-4248	08/07/1980	Male
Ebony	Black		123-04-5067	08/08/1950	Female
John	Black	Emergency Shelter Program - 07/28/2006 to 10/16/2008	999-99-9999	04/04/1959	Male
*	* black		*	* 📅	Male

   * Indicates Required Fields

7. Click the **New Record** radio button. The row refreshes and the following data entry field appear for completion:

   The First Name, Last Name, and SSN fields are pre-populated with any search criteria entered on the previous page.

   • **First Name -** Type the first name of the new household member as it should appear throughout the system.

   • **Last Name -** Type the last name of the new household member as it should appear throughout the system.

   • **SSN -** Type the SSN of the new household member.

   • **Date of Birth -** Type the date of birth of the new household member (using mm/dd/yyyy format), or use the date picker that appears to the right of the field.

8. **Gender -** Click this drop-down arrow and select the gender of the new household member.Beneath the table of search results, in the **Living With Household** portion of the page, if the household member being added does not actually reside with the primary client and you wish to capture that detail, click the "No" radio button. The "Yes" radio button is selected by default.

9. Click the **Relation to Primary Client** drop-down arrow and select the relationship that describes the new household member in regard to the household's primary client.

10. In the **Start Date** field, type the date that the new household member became a member of the household, or use the date picker to the right.

Determining when a member "joins a household" is defined by each individual program. Residential programs may define this as the date the household member moved in with the primary client. Non-residential programs may define this as the date the household member became a member of the household, regardless of when agency services began. Due to this flexibility, this date is not tied to a program admission date or residential move in date.

11. Click **CONTINUE**. If a child was added, you may be taken to another household info form to collect additional data on the newly created household member; otherwise, the *Household Composition* page is displayed, and the "Household Composition" tab is shown containing the newly added household member. A pop-up window appears asking **Would you like to admit [name of new household member] into this program?**

- If the newly added household member is receiving services within the selected program, click **Yes** in the pop-up window. A pre-populated admission form (for single-step programs) or referral form (for multi-step programs) is displayed for the selected program. Use this form to admit the household member into the program and complete the process.

- If the newly added household member is not receiving services within the selected program, click **No** in the pop-up window. The *Household Composition* page is displayed, and the "Household Composition" tab is shown containing the newly added household member.

Editing Household Member Information

The type of information being edited and the admission status of the household member it is being edited for (admitted into an agency program or not admitted) determines where in AWARDS you complete updates.

- **If a household member is admitted** as receiving services within an agency program, his or her service information can be edited within their program records as usual. This may include the client's face sheet, admission form, service records, or housing records. However, to update household-specific information (like the member's relation to the primary client), this is done within the Household Composition feature.

- **For household members that are not admitted** into agency programs, all edits are completed within the Household Composition feature.

To edit household member information within the Household Composition feature, complete the following steps:

1. Access the Household Composition feature of the client for which you are editing information or select the primary client if the household member for whom you are editing information is not admitted into an agency program.
2. Click the **Household Composition** tab. The page is refreshed to display all current household members.
3. If the household member you are editing information for is not a current household member, update the **From** and **To** dates, or select the **Complete History** radio button and click **Apply** to refresh the content of the table.
4. Locate the household member you are editing information for and click his or her name, which appears as a link on the table. The *Household Composition* page is displayed.

5. Edit the details of the following fields and options as needed:

- **First Name -** Update the first name of the household member, if necessary.

- **Last Name -** Update the last name of the household member, if necessary.

- **SSN -** Update the SSN of the household member, if necessary.

- **Relation to Primary Client -** Click this drop-down arrow and select a new relation to the primary client, if necessary.

  "Self" is not an option in this drop-down list, as changing the primary client cannot be done on this form. If the primary client is being discharged from the program via the Discharge module, an option is displayed allowing the user to select a new primary client of the household at that time. Alternatively, the entire household can be discharged with the primary client.

- **Date of Birth -** Update the date of birth of the household member, if necessary.

- **Gender -** Click this drop-down arrow and select a new gender for the household member, if necessary.

- **Living With Household -** Select "Yes" or "No" as necessary. Selecting "No" indicates that the household member is not physically residing with the primary client.

- **Start Date -** Update the date that the household member became a member of the household, if necessary.

- **End Date -** Enter or update the date on which the household member leaves, or is no longer a member of, the household. Once an End Date is entered, an "Inactive" status displays for the household member on the Household Composition tab.

Future dates can be entered for End Dates, and in that case the household member's status does not change to "Inactive" until the specified date is reached.

- **Delete -** If it is necessary to remove a household member record (because, for example, he or she was added to the wrong household) click this check box and the corresponding history is removed when the page is saved.

  IMPORTANT! Historical household information is maintained in the Household Composition feature, so that if a household member joins and leaves a household repeatedly, each household history will be listed on its own line. If only one history is to be removed, check the Delete option for only that stay.

  If the household member only has a single household history, deleting that stay/record will remove the household member completely from the household.

6. Click **CONTINUE**. When a household member's record is edited, you may be taken to another household info form to collect additional data on the newly created household member; otherwise, the *Household Composition* page is displayed, and the Household Composition tab is shown.

Changing the Primary Client in a Household

The process of changing the primary client within a household involves removing the current primary client, designating a new one, and then adding the former primary client back into the household. To do so, complete the following steps:

1. Access the Household Composition feature of the client for which you are editing information.

2. From the *Household Composition* page, click the **Household Composition** tab.

3. Click the name of the primary client. The *Household Composition* page is displayed for the client in data entry mode.

4. Within the "Household History" portion of the page, click the **Delete** check box(es) that correspond to all history records.

5. Click **CONTINUE**. The *Primary Client Removal* page is displayed.

6. Select the **Retain the household members...** radio button, which contains a drop-down for selecting a new primary client from other members of the household.

7. Click this drop-down and select the household member to be the new primary client.

8. Within the table at the top of the page, select **New Relation to Primary Client** values from the corresponding drop-downs for any remaining household members.

9. Click **CONTINUE**. The updated *Household Composition* page is displayed.

10. Click **Add New Household Member** and follow the steps to add the former primary client back into the household, as described above in Adding a New Household Member.

Once the former primary client has been added back into the household, the process of changing the primary client in a household is complete.