CARES
OF NY, INC
ENDING HOMELESSNESS

How to: Add Additional Household Members at Admission/Intake

INSTRUCTIONS FOR AWARDS HMIS

Complete the following steps if you are adding to the household <u>immediately</u> after having placed the primary client in the household:

1. From the **Household Composition page**, select **Yes** to add another member to the household and click **CONTINUE.**

2. AWARDS will automatically refresh and prompt users to **search for the client record of the household member being added** (see below).

    Training - Family Emergency Shelter
    Household Search
    Global Household ID: 282734
    Min Emumm

    Enter the first name or last name of the household member you would like to add.
    If the member is an existing client you will be given the option to select them to be added to the household.

First Name	Last Name

    Limit Search Results to [25 ▼] Matches

    [CONTINUE]

3. In the **First Name** and **Last Name**, fields, type identifying information for the household member being added.

    NOTE: If the client you are searching for has been a client of the agency in the past, less data is required (e.g., Only the first two letters of the household member's first and last names).

4. Click **CONTINUE**.

5. The **Household Search Results page** will be displayed (see below right). 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. Review the search results:

    - If the household member being added **appears** on the list of matches, it means they have an existing record in AWARDS; click the radio button to the left of their name and skip to **Step 8**.

    - If the household member being added **does not appear** on the list of matches, continue to the next step.

    Training - Family Emergency Shelter
    Household Search Results
    Global Household ID: 282734
    Min Emumm

Search Criteria	
First Name:	Max
Last Name:	Emumm

    The following results were found.
    Please select one of the following matches to add to the household.

	First Name	Last Name	Program History(s)	Date of Birth	Gender (HMIS)
○	New Record				

    Indicates Required Fields

Living With Household	*Start Date	End Date
◉ Yes ○ No		

    * Indicates Required Fields

    [CONTINUE]

    TIP: Clients that appear with the following red icon next to their name already belong to a household within the agency.

    NOTE: AWARDS will only allow a client to be active in one household at a time within a project. To see the details of the household to which the client belongs, click that red icon next to his or her name; the Household Composition page for that household will be displayed in a pop-up window over the search results page. From there, you can **Edit Household Composition** of <u>that</u> household (e.g. to remove the client to be able to place them in the first household) or **Close**.

6. Click the **New Record** radio button in the last row of the search results.

7. AWARDS will automatically refresh (see below), and **the following data entry fields will appear** for completion:

Training - Family Emergency Shelter
Household Search Results
Global Household ID: 282734
Min Emumm

Search Criteria	
First Name:	Max
Last Name:	Emumm

The following results were found.
Please select one of the following matches to add to the household.

	First Name	Last Name	Program History(s)	Date of Birth	Gender (HMIS)
◉	* Max	* Emumm		* ▦	▼

* Indicates Required Fields

Living With Household	*Start Date	End Date
◉ Yes ◯ No	▦	▦

* Indicates Required Fields

CONTINUE

🖊 **NOTE:** The First Name and Last Name, fields will be 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.
- **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 on the right of the field.
- **Gender -** Click this drop-down arrow and select the gender of the new household member.

8. In the **Living With Household** section of the page, the "**Yes**" radio button is selected by default (see below).

Living With Household	*Relation to Primary Client	*Start Date	End Date
◉ Yes ◯ No	▼	▦	▦

* Indicates Required Fields

- 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**.

9. In the **Start Date** field, type the date that the new household member became a member of the household. Click **CONTINUE.**

10. A **pop-up message** will be displayed. The pop-up asks if the household member **should** be admitted:
    - Click **Yes,** and a *pre-populated admission form is displayed for the selected program*.
        - **Use this form** to admit the household member into the program and complete the process.
    - Click **No, and you will be returned to the starting page**.

11. On the starting page:
    - To add another household member to the household, select **Add New Household Member** and complete the above steps again.
    - If no further household members should be added to the household, select **No** and click **CONTINUE**.

12. When the page refreshes, click **FACESHEET** to designate the household member's relationship to the Primary Client .

13. The **Relationships for [new household member] pop-up** is displayed (see right). Make updates and click **SAVE.**

14. The page refreshes to the primary client's FaceSheet; click the HOME button to return to other activities.

Training - Family Emergency Shelter
Household Composition - Admissions
Global Household ID: 282734
Min Emumm

First Name	Last Name	Date of Birth	Relation to Primary Client
✔ Max	Emumm	12/01/2001	
✔ Min	Emumm	03/21/1980	Self

FACE SHEET

Relationships for Min Emumm	✕
* Max Emumm is Min Emumm's	Son ▼

Save   Cancel

★ **The process of adding additional household members is now complete!**