



How to: Add a New Household Member to an Existing Household

INSTRUCTIONS FOR AWARDS HMIS

Step 1: Select the correct process:

Household member that will also be admitted as receiving services at an agency program:

- » May be added through **existing primary household member's face sheet** (these instructions) **OR** using the intake/admission process (not these instructions).

Household members that will **not** be admitted into an agency program:

- » **Must** be added through the Household Info form of the **existing primary household member's face sheet** (these instructions).

- ★ **IMPORTANT!** The new household member must be added using the correct process, as incorrectly adding a household member that is not receiving services may cause more data to be captured for them than necessary. Use the process detailed here.

Step 2: Add a household member via a face sheet:

1. Access the **Household Composition** feature of the primary client of the household, as described [here](#).
2. By default, the "Global Household Composition" tab is displayed (see right), listing all current household members (as of today's date).
3. Click **Add New Household Member**.

4. The **Household Search** page is displayed (see right).

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.)

5. In the **First Name**, **Last Name**, and **SSN*** fields, type identifying information for the household member being added to the household. Full name is not necessary; you may enter the first two letters of the household member's first and last names.

***NOTE:** The SSN field is only displayed if the program is set up behind-the-scenes to do so.

6. Click the **Limit Search Results** to drop-down arrow and select the number of matches to be displayed in the Search results.
7. Click **CONTINUE**.

8. The **Household Search Results page** is 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.
9. Review the search results and determine if the household member to be added to the household appears on the list of matches.
 - a. If he or she **is listed**, click the radio button to the left of the name, and continue with step 11.
 - b. If the household member to be added **does not appear** on the list of matches, continue with step 10.

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

NOTE: As a rule, AWARDS will only allow a client to be active in one household at a time. To see the details of the household to which the client currently belongs, click that red icon - 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 that household (e.g. to remove the client to be able to place them in the first household) or **Close**.

10. Click the **New Record** radio button. The row refreshes and data entry fields appear for completion (see below).

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

- a. **First Name** - Type the first name of the new household member as it should appear throughout the system.
- b. **Last Name** - Type the last name of the new household member as it should appear throughout the system.
- c. **SSN*** - Type the SSN of the new household member.

NOTE: The SSN field is only displayed if the program is set up behind-the-scenes to do so.

- d. **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.
- e. **Gender** - Click this drop-down arrow and select the gender of the new household member.

11. Beneath the table of search results, in the **Living With Household** portion of the page (below), 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.

12. 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.

TIP: 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.

13. Click **CONTINUE**.

- a. If a child was added, you may be taken to another household info form to collect additional data on the newly created household member;
- b. Otherwise, the Global Household Composition page is displayed, and the "Global Household Composition" tab is shown containing the newly added household member.

14. A **pop-up window** appears asking "Would you like to admit [name of new household member] into this program?"

- a. 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.

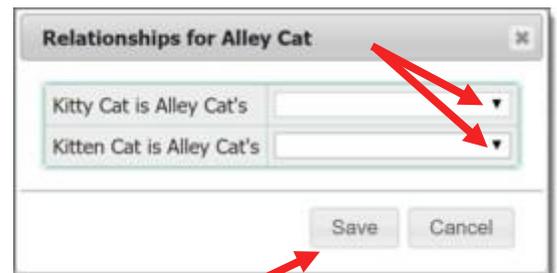
 * **TIP:** For more information on completing admissions, see [Multi-Step Intake/Admission](#) or [Single-Step Intake/Admission](#).

 * **TIP:** If the newly added household member begins receiving services within the selected program at a later time, you can process that admission using the **Create Admission** icon for that individual on  the right side of the "Global Household Composition" tab on this page.

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

15. Click the **Update Relationships** icon  for the individual you just added to the household.

 **NOTE:** The **Update Relationships** icon will be green  for the individual through whose records the household was accessed (which should be the primary client). For all others, the icon will be black.

16. The **Relationships for [new household member] pop-up** is displayed (see right).17. Click each of the drop-down arrows on this page and select the **appropriate relationship designation** to reflect how the new household member is related to the existing household members.18. Click **Save** to apply your changes.19. The **Household Composition page** is re-displayed with "Global Household Composition" tab visible.


 * **TIP:** The "Global Household Composition" tab only shows relationship information for the individual through whose records you accessed the Household Composition feature (the individual with the green icon from Step 15) As a result, you may not see all of the relationship information you just updated reflected here.

 **The process of adding a new household member is now complete!**
