CARES
OF NY, INC
ENDING HOMELESSNESS

How To: Edit Household Member Information

INSTRUCTIONS FOR AWARDS HMIS

Step 1: Determine where to complete the process:

★ **IMPORTANT!** The **type of information** being edited and the **admission status** of that household (admitted into an agency program or not admitted) determine **where in AWARDS you complete updates**.

Household member admitted as receiving services within an agency program:
» Service information can be edited within their program records (as usual).
» However, to update household-specific information (like the member's relation to the primary client), this is done within the Household Composition feature (these instructions).

Household members that are not admitted into agency programs:
» All edits are completed within the Household Composition feature, accessed through the primary client of the household (these instructions).

Step 2: To edit household member information within the household composition feature:

1. Access the **Household Composition feature of the client** for which you are editing information, as described here, **or select the primary client** if the household member for whom you are editing information is not admitted into an agency program.

2. By default, the "Global Household Composition" tab is displayed (see right), listing all current household members (as of today's date).

3. If the household member you are editing information for is not a current household member, click the **Complete History** radio button at the top of the page and the contents of the table will be refreshed to reflect the full household history.

4. Locate the household member you are editing information for.

   a. To **edit ONLY the household member's relationship** to other members of the household, skip ahead to **step 9**.

   b. To **edit anything else for that household member**, continue to **step 5**.

5. **Click his or her name** (which is displayed as a link on the table).

6. The **Household Composition page** is displayed (see right).

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

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

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

c. **SSN*** - Update the SSN of the household member, if necessary (*only displayed if the program is set up behind-the-scenes to do so).

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

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

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

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

🖌 ✹ **TIP:** If known, a future Start Date can be entered for a household member, and in that case the household member's status does not change to "Active" until that date is reached.

a. **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.

🖌 ✹ **TIP:** 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.

h. **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 checkbox and the corresponding history is removed when the page is saved.

🖌 **NOTE:** 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.

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

8. 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 "Global Household Composition" tab is shown (as in step 1 and 2, on previous page).

   a. To continue by **updating the household member's relationship to other members of the household, continue with step 10**;

   b. **Otherwise, the editing process is now complete** and the remaining steps can be skipped!

9. Click the **Update Relationships** icon ⚓ for the individual whose relationship information is to be edited.

🖌 **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.

10. The **Relationships for [new household member] pop-up** is displayed (see right).

11. Click each of the **drop-down arrows** on this page and select or make changes to the corresponding **relationship designation** to reflect how the household member is related to the existing household members.

12. Click **Save** to apply your changes. The **Household Composition page** is re-displayed with "Global Household Composition" tab visible.
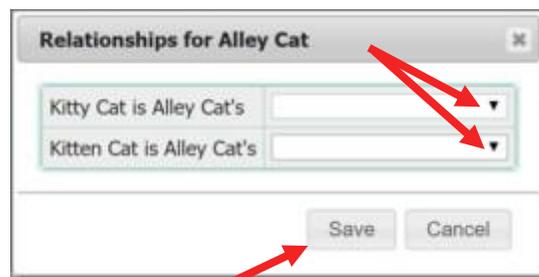
🖌 ✹ **TIP:** The "Global Household Composition" tab only shows relationship information for the individual through whose records you accessed the Household Composition feature (the individual with the green icon). As a result, you may not see all of the relationship information you just updated reflected here.

⭐ **The process of editing household member information is now complete!**