How-To Guide:
Managing Households in HMIS

Contents

Households 101

What is the Function of Households in HMIS?

- The Households function in HMIS allows the user to create a household when a group of persons (2 or more) present together as a household or family unit, and are being provided services together
- This will give the user the ability to create an Entry/Exit record that includes all the members of a household, and to assign Service Transactions to all members of a household as well
- Households are created with one person designated as the Head of Household, and when other members are added, they are identified by their relationship to the Head of Household

The Households Tab

- Is where the user will connect client records together so that they can be connected in provider entries on the Entry/Exit tab, or within Service Transactions
- **NOTE:** Clients connected together on the Households Tab will not automatically populate as connected on your funder reports. A household must have either an Entry/Exit record, a Service Transaction, or a Shelter Stay together in order to pull as a household on your report

Single Clients

- Households are not created for single clients. If a single client is entering your program, you do **not** need to create a household!
- If a client who was previously part of household returns to the system as a single client, do nothing on the Household tab. You would simply **not** include the other household members in the Entry/Exit record or Services for that single client

Should I Delete or Remove a Client From a Household?

- **No!** NEVER delete or remove a client from a household on the Households Tab
- Deleting a household member deletes previous associations and will likely cause errors on your reports and is very difficult to correct after the fact
- The only acceptable reason to delete household members is when a data entry mistake was made, and the client(s) should not be included in the household at all. Be sure to correct the mistake as quickly as possible. When in doubt, contact the HMIS Helpdesk for guidance!

About Heads-of-Households

- The term "Head of Household" does not necessarily mean "leader" of the house. It is simply a way to organize family units more easily in ServicePoint. The Head of Household is essentially the primary client of the household, or the eligible individual who is most likely to remain enrolled in program and be your main point of contact
- **NOTE:** There **cannot** be more than one Head of Household per Entry/Exit enrollment

Creating and Enrolling a New Household

When You Should (and Should Not) Create a New Household

- There are potentially many scenarios that will arise as you create and edit households in your program. Listed below are some of the most common scenarios that come up, however be sure to email the HMIS Helpdesk if you are unsure or in need of support

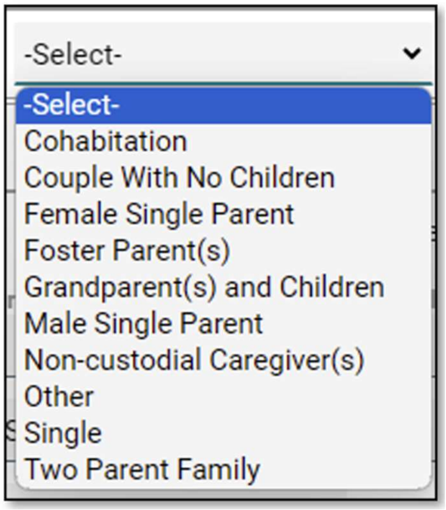
YES	Yes – Create a New Household: ○ If you receive a Coordinated Entry referral for a family vacancy at your program, and are only referred the Head of Household from the Priority List, you may need to create the rest of the household at intake. (Depends on your CoC's procedures.) ○ Create a new household if the Head of Household or Household Type changes in-between project enrollments. ○ If the Head of Household changes during enrollment, you will want email the Helpdesk for guidance, as this is a complex process which will likely involve creating a new household.
NO	No – Do Not Create a New Household: ○ If there is a household that matches the current configuration of the household presenting for services already created in HMIS, use that existing household. ○ If the Household Type changes but the Head of Household stays the same, add the new client(s) to the current household and change the type in the Household tab accordingly. ○ If the Household Type changes in a household that is **currently being served** by your project, do not create a new household.

Multiple Households

- Some clients will inevitably end up in multiple households. Just be certain that you are enrolling the **correct** household for your client(s), to ensure that your funder reports are not adversely affected
- To confirm you have the correct household:
  - Locate the previous household that has the same Head of Household
    - Of those, is there a household setup that matches the current clients and/or Household Type presenting for services? If not, which household most closely aligns with the current household?

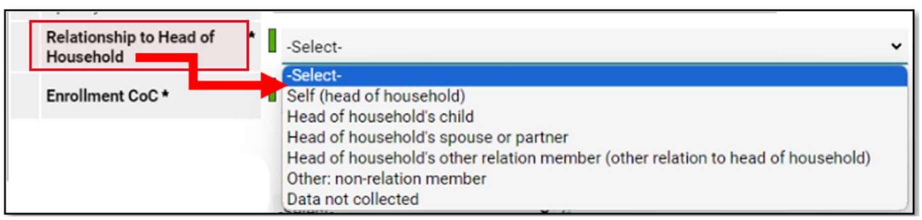
Household Type & Relationship to Head of Household

HMIS designates the following categories as Household Types that you can select for a household:



Each member who is part of a household is also identified by their **Relationship to the Head of Household**. This relationship is designated in two different places in a client record:

- On the Households tab, in the Manage Households pop-up. This is a system designation for Relationship to Head of Household
- On the assessments completed for a client at entry. This is a HUD required data element for Relationship to Head of Household:



Creating a New Household

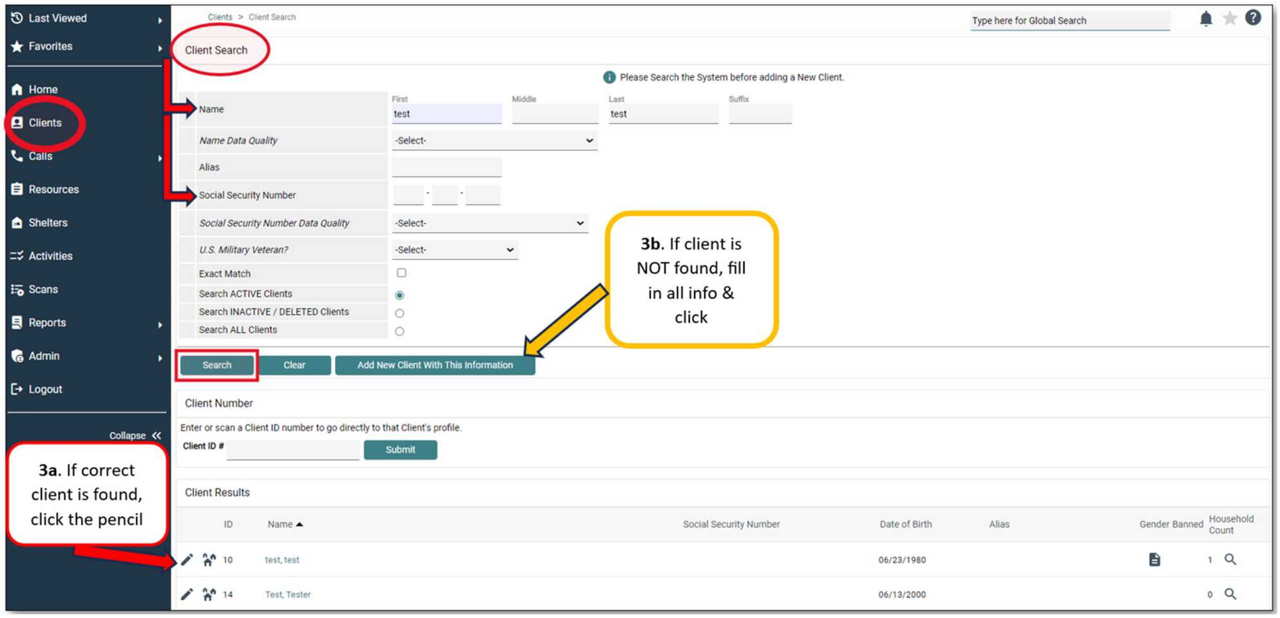
A. Home Dashboard

1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the project for which you are entering data
3. If needed - Set **Back Date Mode** for the date that the update was completed

B. Client Search

1. Click on **Clients**
2. Enter **Head of Household** Name &/or partial SSN
3. Click **Search**
   a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **pencil** to the left of the client's name
   b. If no matches are found, try at least two other ways to search for the client (partial name, alias, or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and

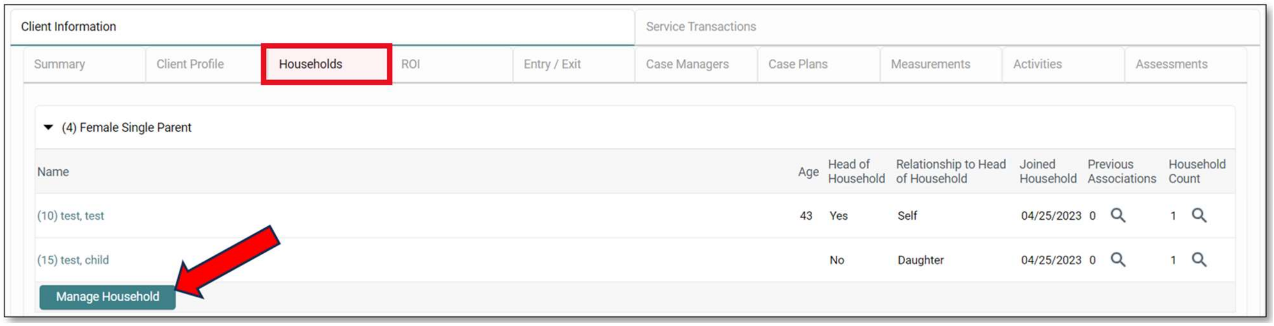
veteran status, and click **Add New Client with This Information**



C. *Households*

NOTE! <u>If the client is presenting as a single client, skip this section</u>

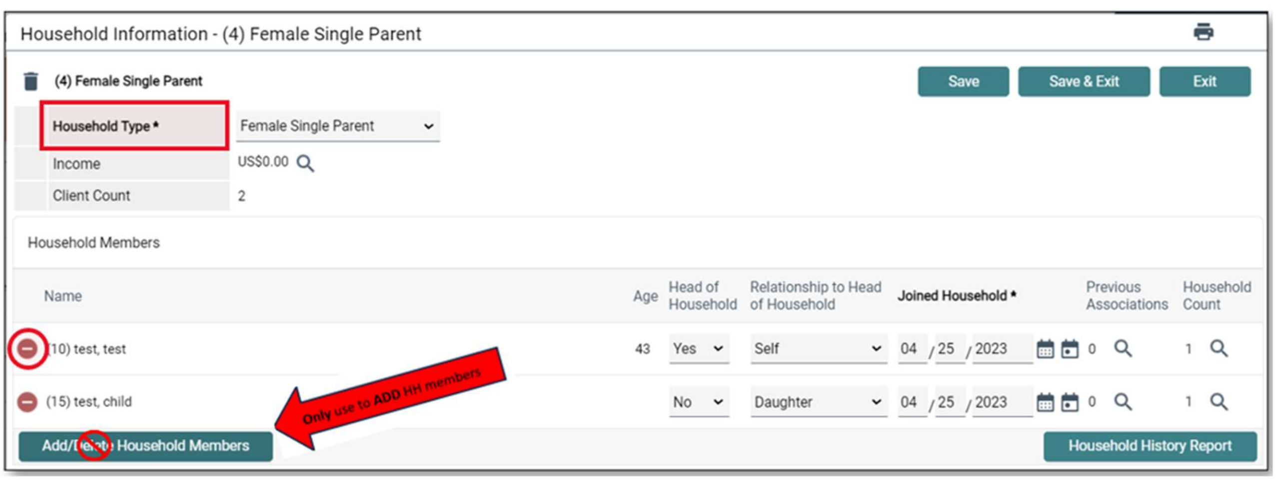
1. Click on **Households** tab
2. If no household appears, click **Start New Household**
   a. Select appropriate **Household Type**
   b. Search for additional household member(s)
      - Enter another household member's Name
      - Click **Search**
         - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus** to the left of that client's name
         - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**
   c. Repeat the search until all household members are listed in the "Selected Clients" section
   d. Click **Continue**
   e. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top
   f. Click Save & Exit
3. If a household is showing on this tab, verify/update household details by clicking **Manage Household**



a. Verify **Household Type**
   - **NOTE!** Do this for **every** HH member

b. Remove household member(s) by clicking the red circle next to their name
   - **NOTE!** ***<u>Do NOT</u>*** remove clients by clicking **Add/Delete Household Members**

c. Add household member(s) by clicking **Add/Delete Household Members**
   - Click the arrow to expand **Add Clients to the Household** section
   - Search for additional household member(s)
     - Enter another household member's Name
       - Click **Search** (**NOTE!** Same steps as done above in Step B)
         - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus** to the left of that client's name
         - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**



   - Repeat until all household members are listed in the "Select Clients" section
   - Click **Continue**

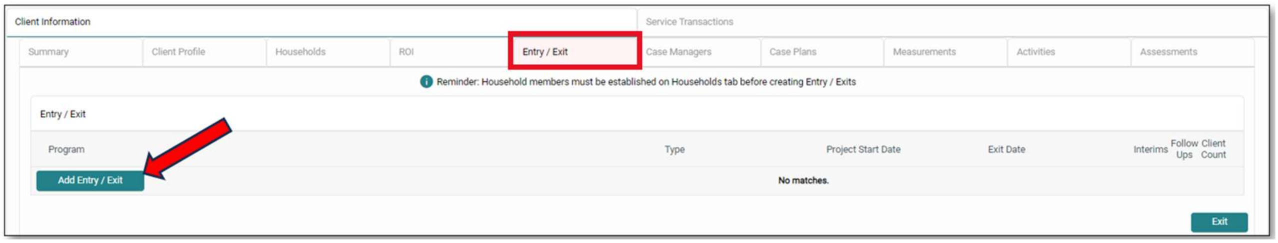
d. Select **Head of Household** and **Relationship to Head of Household** for each

Household member from the table at the top.

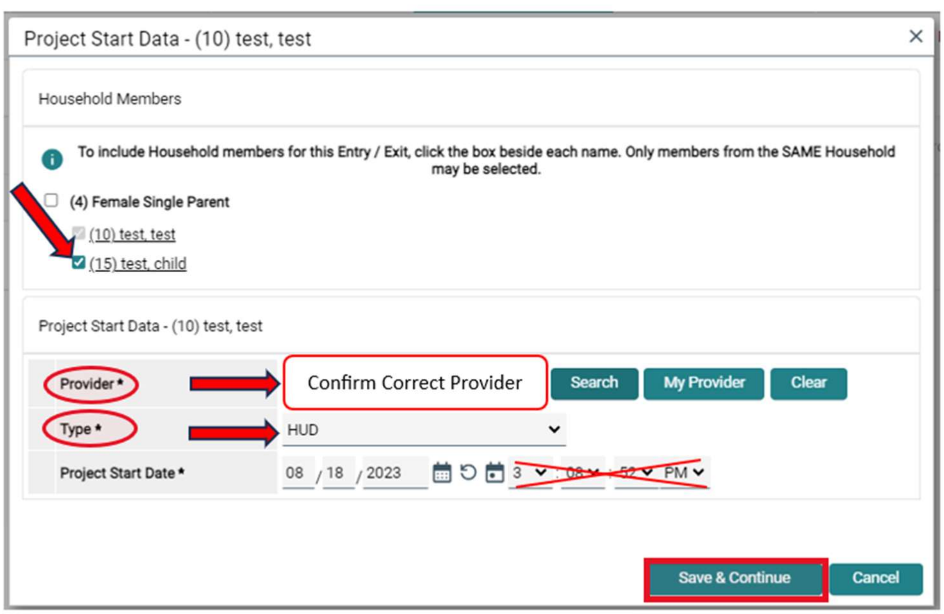
e. Click **Save & Exit** once complete

Enrolling the New Household Into Your Project

1. While on the Head of Household client record - Click **Entry/Exit** tab
2. Click **Add Entry/Exit**



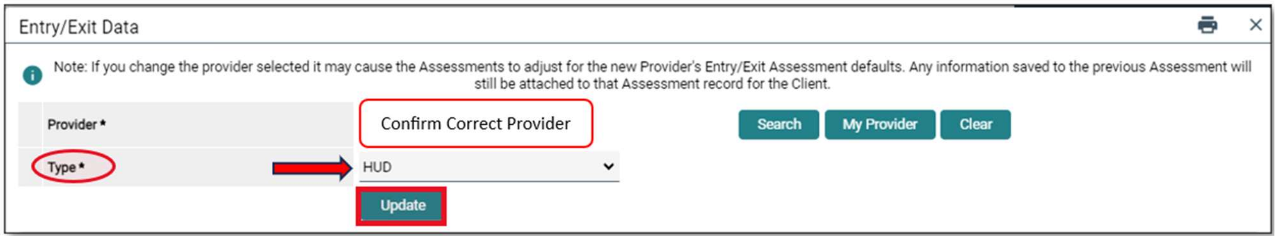
3. Confirm Project Start Data
   a. If there is more than one client entering, check the box next to each additional household member that is entering the project.
      - *Anyone not checked will be excluded from the project*
   b. Confirm the Provider listed is correct
      - The *default provider appearing will be whatever was selected under Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and re-search for the head of household*
   c. Select HUD as the Type
   d. Confirm the **Project Start Date**
      - Do NOT change the time fields
   e. Click **Save & Continue**



4. Complete the assessment

a. *If the screen reads "<u>No Entry Assessment had been specified for this Provider</u>", the wrong project type was selected*

- *Scroll to the top of the screen*
- *Select the correct **Type** from the drop menu*
- *Click **Update***



b. Complete/update assessment for the Head of Household

- Click Save at the bottom of the screen

c. If entering for multiple household members, after saving, go to the top of assessment and click 'Add Household Data' to copy common data for household members

d. Complete assessment for any additional household members:

- Scroll to the top of the assessment
- Click on the name of the next additional household member from the "Household Members" menu on the left

- Complete assessment & repeat until all household member data has been entered
- Click Save & Exit

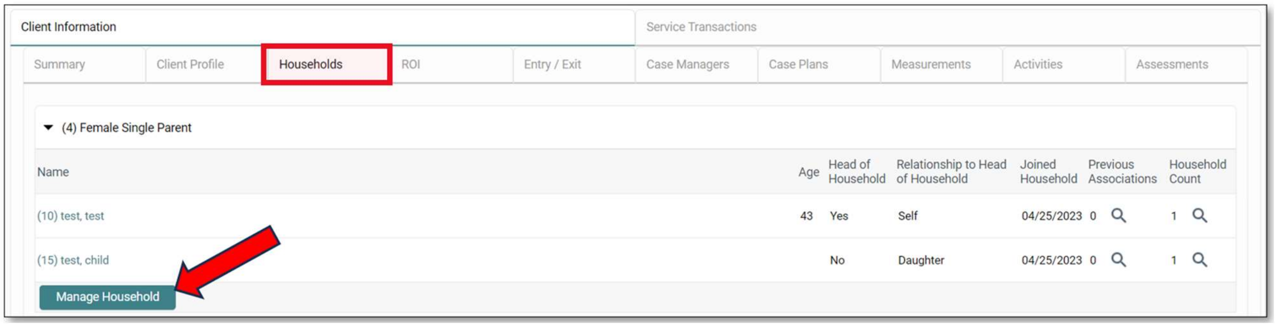
<u>If the Head of Household Changes During an Enrollment</u>

When a Head of Household leaves and is officially exiting your program, but the rest of the household members will be continuing their enrollment in the program:

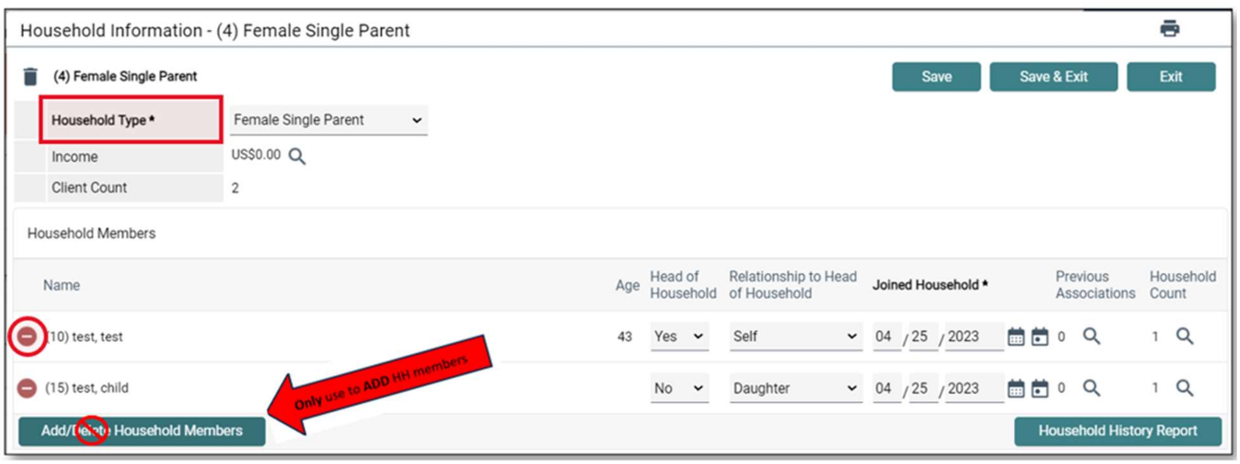
- We recommend that you **contact the Helpdesk** in this situation, as a Head of Household change generally warrants creating a new Household, and the process can be complex
- Helpdesk will likely recommend that the user exit ALL household members on the date that the Head of Household left, and then create a new Entry/Exit with the new Head of Household and members who will be staying

Adding New Members to a Household During a Project Stay

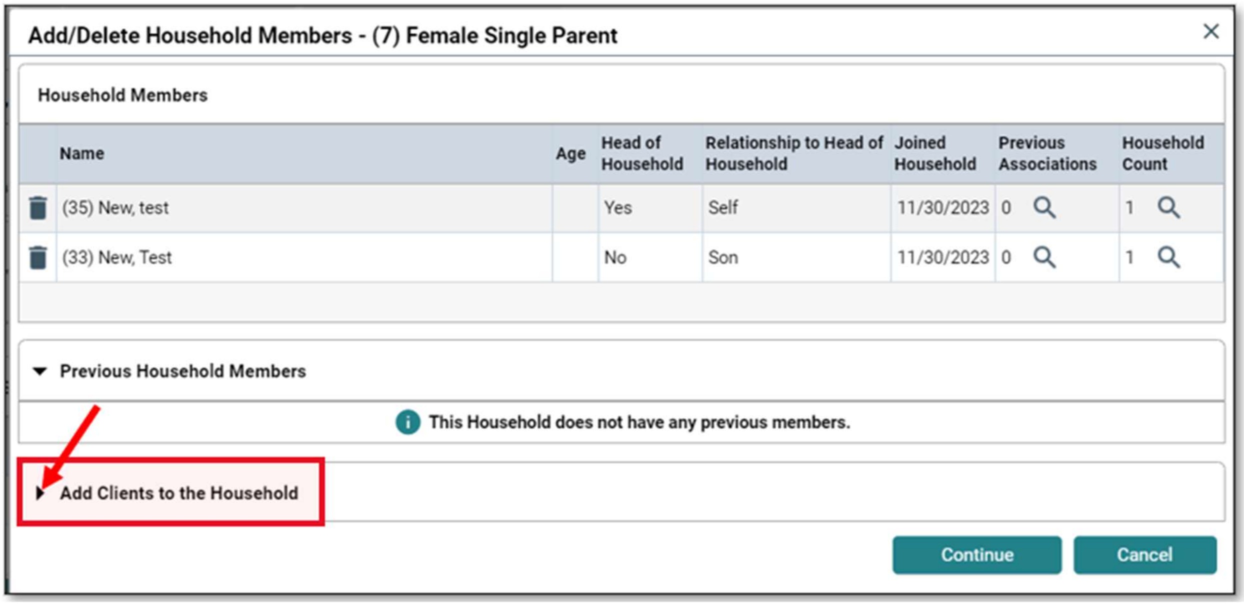
- Enter **EDA** mode to the provider into which the new household member is entering
- Search for and open the **Head of Household**'s record
- **Back Date** to the date the NEW household member is joining
- In the Head of Household's record, navigate to the **Households Tab**
- Click on the **Manage Household** button to edit the existing household



- Update the **Household Type**, if appropriate
- Click on the **Add/Delete Household Members** button



- Click the arrow next to the **Add Clients to the Household section**

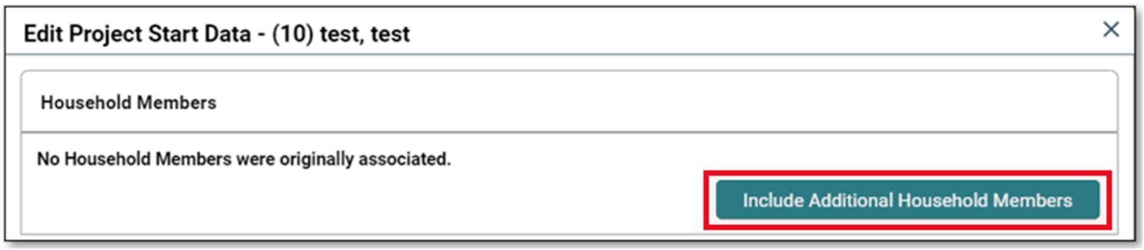


- Once the section expands, fill out the new household member's name, name data quality, SSN, SSN data quality, veteran status, then click **Search**
- If the client appears in the search results, click the plus sign to add them to the household. If the client does not appear in the search results, click **Add New Client with This Information**
- The new member's name will then appear in the **Selected Clients** section
  - Click **Continue** once all new household members have been added
- Select the **Relationship to Head of Household** for the new member of the household
- Be sure that the new member's **Joined Household** date is <u>the date that client started living in your program</u>. (If you are in Back Date mode, this will automatically be set to the Back Date)

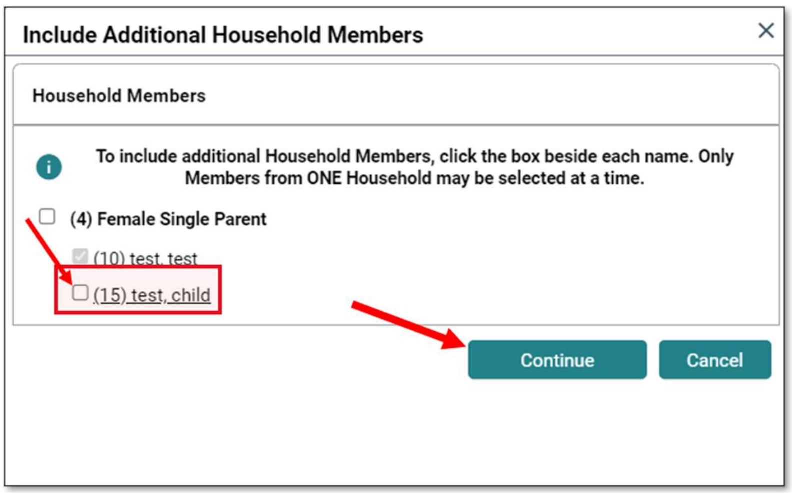
NOTE - You are not done yet! You must also complete the section below to ADD the new household member(s) to the existing Project Entry, or they will not be enrolled together in your program with the rest of the household. Please continue to the next section to complete the necessary steps.

Adding New Member to the Household’s Existing Project Entry

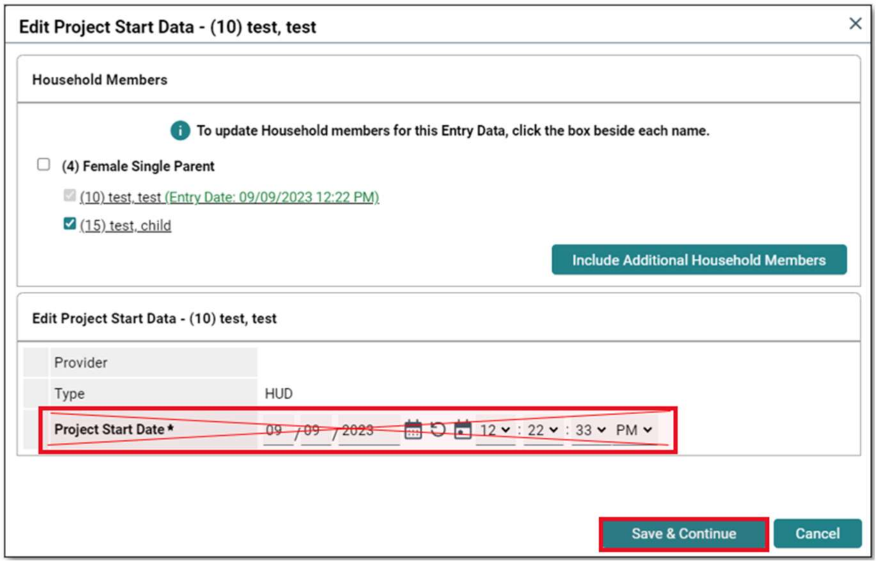
- Enter the **Head of Household's** record, and navigate to the **Entry/Exit Tab**
- Click on the **edit pencil** next to the **Project Entry record** into which you will be adding the new household member
- In the ‘Edit Project Start Data’ window, click **Include Additional Household Members**



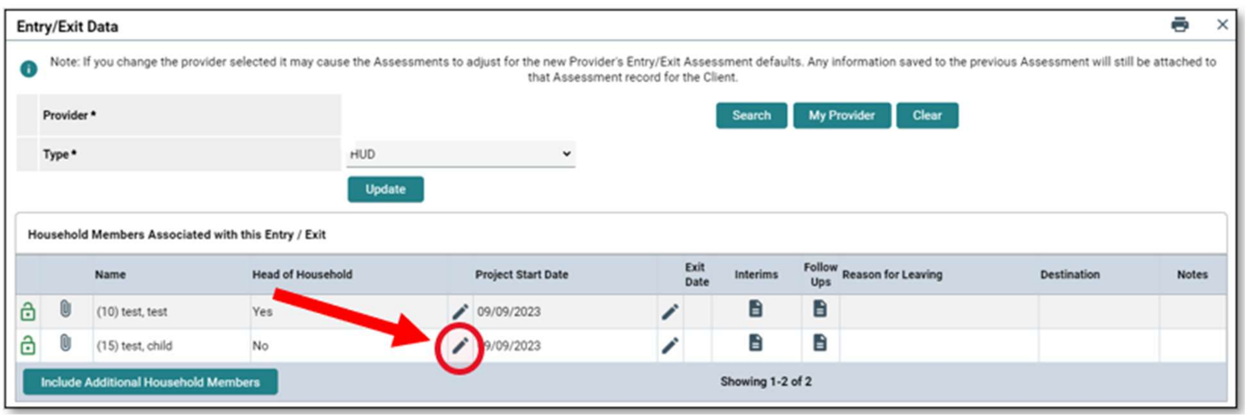
- **Check the box** next to the new household member(s) you want to include, and then click **Continue**



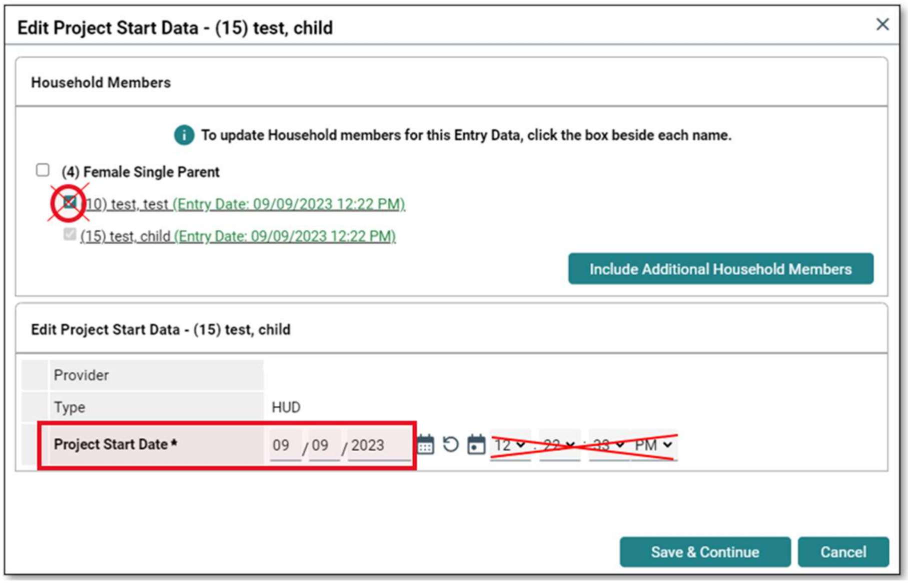
- You will now be brought back to the **Edit Project Start Data** window.
  - The Project Start Date field will remain populated with the household’s Project Start Date. **Do not** change this now, as you will be adjusting the Project Start Date for the new member in the next steps
  - Click **Save & Continue**



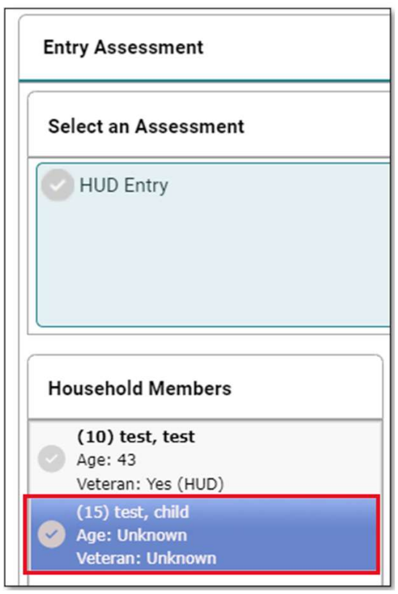
- At the top of the Entry/Exit Data window, click the **edit pencil** next to the Project Start Date of **the client who just joined the household**



- Now in the Edit Project Start Data pop-up, **un-check** all members **except** the newly joining client
- This is where you'll want to make sure the new member's **Project Start Date** matches the date they joined the program. When updated, click **Save & Continue**



- Select the new household member's name on the left-hand side of the screen, and then **complete all Entry assessment questions** for that client



- Once all assessment questions have been answered for the newly joining client, click **Save & Exit**

When a Household Member Leaves the Household During a Project Stay

NOTE – NEVER delete or remove a client from a household!

Deleting a household member deletes previous associations and will likely cause errors on your reports and is very difficult to correct after the fact. When exiting a client who is part of a household, you only need to record an Exit Date for that one client from the program enrollment on the Entry/Exit tab, and on any corresponding Service Transactions on the Service Transactions tab.

When a Non-Head of Household Member Leaves

- EDA to the provider that the client is exiting from
- Search for and open the record of **the client who is exiting your program**
- **Back Date** to the **date the client left** the household
- In the exiting client's record, navigate to the **Entry/Exit Tab**
- Locate the Entry/Exit row of the provider the client is exiting, and click on the **edit pencil** to the left of the blank **Exit Date**
- At the top of the next **Edit Exit Data** pop-up, be sure that there is a **check-mark** next to **only the client who is leaving** the program
- Since you are in Back Date mode, the **Exit Date** field should already be correctly set to the date the client left the program. Complete the **Exit Destination** for the client who is leaving, and then click **Save & Continue**
- Next, **complete all** the Exit Assessment fields, and click **Save & Exit** when you are finished
- Back on the exiting client's Entry/Exit Tab, you should now see their **Exit Date** show up

When a Head of Household Member Leaves

- We recommend that you **contact the Helpdesk** in this situation, as a Head of Household change generally warrants creating a new Household, and the process can be complex
- Helpdesk will likely recommend that the user exit ALL household members on the date that the Head of Household left, and then create a new Entry/Exit with the new Head of Household and members who will be staying

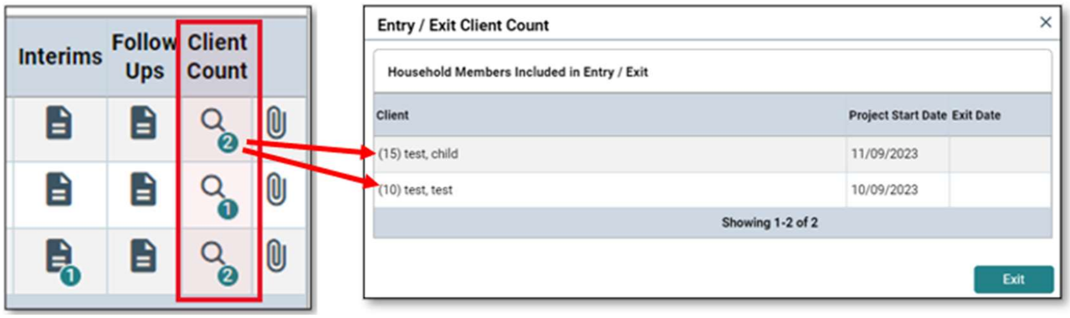
Connecting an Unattached Household Member

If a step is missed in the Households workflow, sometimes a household member or two can fail to become properly connected to their household's Entry into your program. This will often show up as a child reporting as their own Head of Household, or as a single client on a data quality report.

Client Count Per Entry/Exit

- When you navigate to the **Entry/Exit Tab** on a client's record, you will notice a column titled **Client Count**, in which the little blue numbers indicate how many clients or household members are attached to that specific Entry/Exit

- Click on the numbers for a pop-up that will show you specifically which household members are included


Interims
Follow Ups
Client Count
Entry / Exit Client Count
Household Members Included in Entry / Exit
Client
Project Start Date
Exit Date
(15) test, child
11/09/2023
(10) test, test
10/09/2023
Showing 1-2 of 2
Exit