

How-To Guide: Managing Households in HMIS

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Households 101

What is the Function of creating Households on the 'Households Tab' in HMIS?

- The Households function in HMIS allows end users to create a household (HH) unit when 2 or more persons **present together** as a single household or family unit; *and*
 - Are being provided services together (individuals are **NOT** required to be related, married, in a relationship, etc.)
- This will give the end users the ability to create a **single** project enrollment record that includes all members of a household, and to assign service transactions to all members of a household
- Each Household created can **ONLY** have a 1 person designated as the **Head of Household** (HoH)
 - When other members are added to a HH, they must be *identified by their relationship* to the HoH
- **NOTE:** Clients connected together on the Households Tab **will NOT automatically** populate as connected on reports
 - All HH members **MUST** be included on a single project enrollment, or service transaction, in order to be recorded as a HH on reports

Which person do I Designate as the Heads-of-Household?

- The term 'Head of Household' (HoH) does **not** necessarily mean 'leader' of the house. It is simply a way to organize family units more easily in HMIS
 - The HoH is essentially the **primary** client of the household and most likely to be your main point of contact
- **NOTE:**
 - For projects that require *specific criteria* be met for eligibility (chronicity, veterans, etc.), when answering the data element 'Relationship to Head of Household' on the project entry assessment – the client that meets the criteria **must** be the person you ID as the Head of Household; and
 - There **cannot** be more than one Head of Household per Entry/Exit enrollment

Single Clients

- Households are **not** created for single clients
 - If a client is entering your project on their own (i.e. no other person is enrolling in the project with them), 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 NOT edit the Household tab**
 - You would simply **not click** the names of the other household members when creating the project enrollment &/or services for that single client

Should I Delete a Client From a Household?

- **No! NEVER** delete a client from a household on the Households Tab
- **Deleting** a household member deletes previous associations, causing errors on reports & is very difficult to correct after the fact
 - Follow the steps outlined in the section 'Removing Household Members: Households Tab – vs – Project Enrollment'
 - The only acceptable reason to delete household members is when a data entry mistake was made, and the client(s) should never have been included in the household at all. Be sure to correct the mistake as quickly as possible. If in doubt, contact the HMIS Helpdesk for guidance!

Multiple Households & Creating / Enrolling 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?

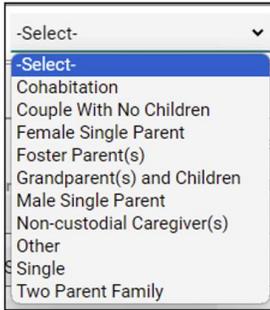
When You Should (and Should **NOT**) Create a New Household

- There are potentially many scenarios that will arise as you create and edit households in your project. 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	<p><u>Yes – Create a New Household:</u></p> <ul style="list-style-type: none">○ If you receive a Coordinated Entry referral for a family vacancy at your project, 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	<p><u>No – Do Not Create a New Household:</u></p> <ul style="list-style-type: none">○ 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.

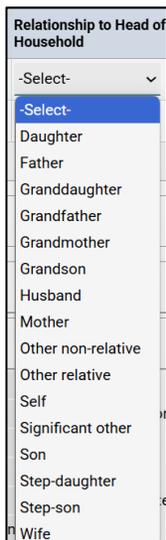
Household Type & Relationship to Head of Household

HMIS designates the following categories as *Household Types* that can be selected when creating a household:

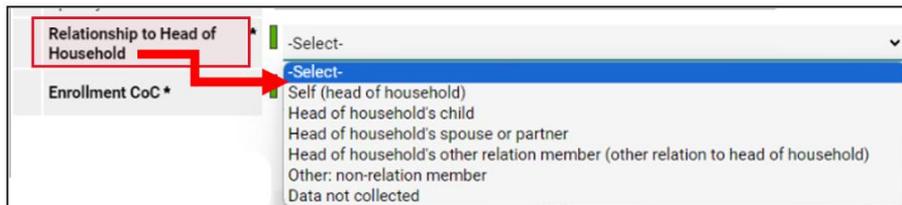


When other members are added to a HH, they must be *identified by their relationship* to the HoH **both on the:**

- **Households tab** when an individual is added as a household member



- **AND** - Every time a **project enrollment** is completed, the data element 'Relationship to Head of Household' must be answered (**NOTE**: depending on the situation – this may or **may not** be the same as indicated on the *Households tab*)



Creating a New Household

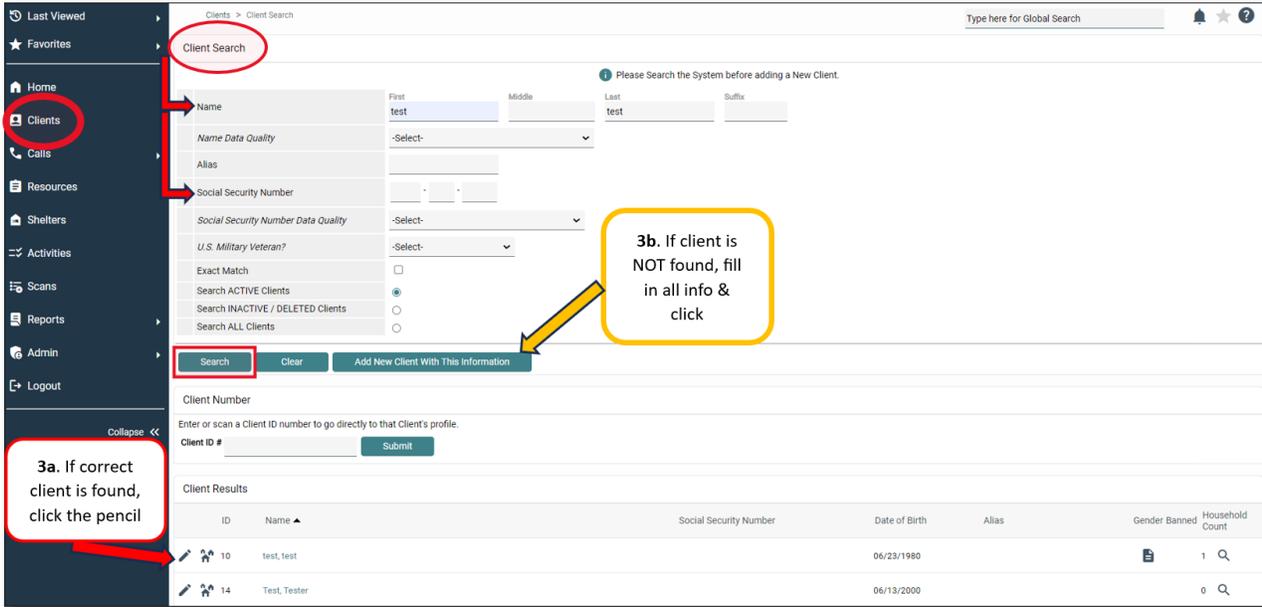
A. Home Dashboard

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

Managing Households in HMIS

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: If the client is presenting as a single client, skip this section

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**

Client Information				Service Transactions						
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments	
▼ (4) Female Single Parent										
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count				
(10) test, test	43	Yes	Self	04/25/2023	0	1	Q			
(15) test, child		No	Daughter	04/25/2023	0	1	Q			
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: Do NOT** 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**

Household Information - (4) Female Single Parent

(4) Female Single Parent

Household Type * Female Single Parent

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(10) test, test	43	Yes	Self	04 / 25 / 2023	0	1
(15) test, child		No	Daughter	04 / 25 / 2023	0	1

[Add/Delete Household Members](#) [Household History Report](#)

- 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**

The screenshot shows the 'Client Information' section of the HMIS interface. The 'Entry / Exit' tab is highlighted with a red box. Below the tabs, a reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. The main content area is titled 'Entry / Exit' and contains a table with columns: Program, Type, Project Start Date, Exit Date, Interims, and Follow Client Ups Count. A red arrow points to the 'Add Entry / Exit' button in the bottom left corner of the table area. The text 'No matches.' is displayed in the center of the table. An 'Exit' button is located in the bottom right corner.

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. Type:
 - PATH Projects: Select 'PATH' for the Type
 - RHY Projects: Select 'RHY' for the Type
 - Veteran Projects: Select 'VA' for the Type
 - ALL Other Projects: Select 'HUD' for 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 "Wrong Entry Type", 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** (NOT **Save & Exit**) at the bottom of the screen

c. 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**

If the Head of Household Changes During an Enrollment

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

- 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 record for the **Head of Household**
- **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

Client Information

Summary Client Profile **Households** ROI Entry / Exit Case Managers Case Plans Measurements Activities Assessments

▼ (4) Female Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(10) test, test	43	Yes	Self	04/25/2023	0	1
(15) test, child		No	Daughter	04/25/2023	0	1

Manage Household

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

Household Information - (4) Female Single Parent

(4) Female Single Parent

Household Type * Female Single Parent

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(10) test, test	43	Yes	Self	04 / 25 / 2023	0	1
(15) test, child		No	Daughter	04 / 25 / 2023	0	1

Add/Delete Household Members

Household History Report

Only use to ADD HH members

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

Add/Delete Household Members - (7) Female Single Parent

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(35) New, test		Yes	Self	11/30/2023	0	1
(33) New, Test		No	Son	11/30/2023	0	1

▼ Previous Household Members

This Household does not have any previous members.

Add Clients to the Household

Continue Cancel

- 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 the date that client started living in your project. (If you are in Back Date mode, this will automatically be set to the Back Date)

Household Information - (7) Female Single Parent

(7) Female Single Parent

Household Type * Female Single Parent

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(35) New, test		Yes	Self	11 / 30 / 2023	0	1
(33) New, Test		No	Son	11 / 30 / 2023	0	1

Add/Delete Household Members Household History Report



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 project 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 record for the **Head of Household**, 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
- Managing Households in HMIS*

- 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**

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * Search My Provider Clear

Type * HUD Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(10) test, test	Yes	09/09/2023						
(15) test, child	No	09/09/2023						

Include Additional Household Members Showing 1-2 of 2

- 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 project. When updated, click **Save & Continue**

Edit Project Start Data - (15) test, child

Household Members

To update Household members for this Entry Data, click the box beside each name.

(4) Female Single Parent

(10) test, test (Entry Date: 09/09/2023 12:22 PM)

(15) test, child (Entry Date: 09/09/2023 12:22 PM)

Include Additional Household Members

Edit Project Start Data - (15) test, child

Provider

Type HUD

Project Start Date * 09 / 09 / 2023 12 : 22 PM

Save & Continue Cancel

- 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

Entry Assessment

Select an Assessment

HUD Entry

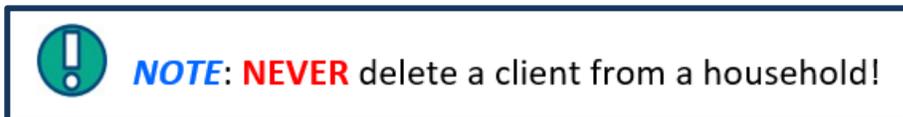
Household Members

(10) test, test
Age: 43
Veteran: Yes (HUD)

(15) test, child
Age: Unknown
Veteran: Unknown

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

Removing Household Members: Households Tab – vs – Project Enrollment



Removing Household Members from the Households Tab:

There may be situations where the end user is informed that an individual client has permanently left a household. In these situations follow the below steps to remove them via the Households tab:

1. Click on the **Manage Household** button to edit the existing household
2. Click the **red circle** next to the name of the individual to be removed from the household

A dialog box titled "Client Left Household" with a close button (X) in the top right corner. It contains an information icon (i) and a message: "By removing this Client from the Household you will no longer be able to associate them with Household information including Goals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date." Below the message is the instruction "Please select the date the Client left the Household." and a date selection field labeled "Date Client Left Household *" with a calendar icon. At the bottom are "Save" and "Cancel" buttons.

3. Enter the date the client left the household
 - a. If needed, complete/update assessment information for remaining HH members & click Save after each
4. When done, click Save & Exit

When a Household Member Leaves the Household During a Project Stay:

Deleting a household member deletes previous associations, causing errors on reports & 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 the client that is exiting from the project enrollment, and on any corresponding services on the Service Transactions tab.

When a Non-Head of Household Member Leaves

- EDA to the project that the client is exiting from
- **Back Date** to the **date the client left** the household
- Search for and open the record of **the client who is exiting the project**
- 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 project
- Since you are in Back Date mode, the **Exit Date** field should already be correctly set to the date the client left the project. 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

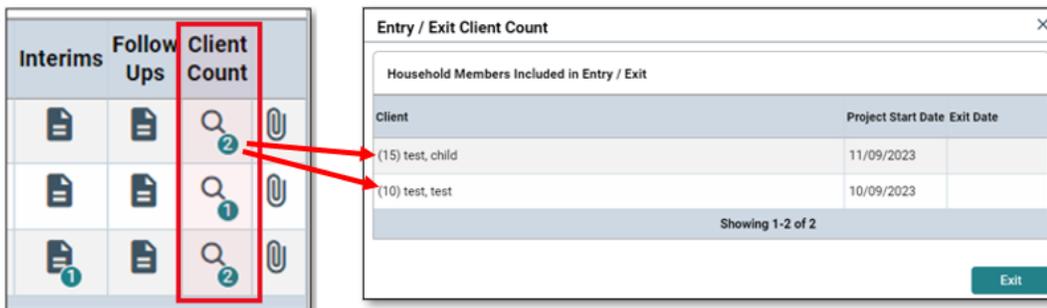
If a step is missed in the Households workflow, sometimes a household member can fail to become properly connected to their household's project enrollment. This will often show up as a child reporting as their own Head of Household, or as a single client on a data quality report.

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 enrollment



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



- If a household member is missing from the enrollment follow the steps in this guide to add them to the project enrollment &/or household