Client Households

Creating a household is an easy way to assign services to a group of people. Households are typically configured in family units with one person as the head of the household. When other members are added to the household, they are identified by their relationship to the Head of Household.

Creating a household makes it faster and easier to record data in *ServicePoint*. By grouping client records together the user may update or provide services, enter a Release of Information (ROI), or create an entry for all household members in one action, thereby eliminating the need to individually create entries for each member receiving services.

Note: *Create household members before creating an Entry/Exit. This allows the Household information to be included in the Entry/Exit which facilitates reporting on households/families.*

Create a New Household

1. Navigate to the **Client Information** tab. (See Figure 2-14)

Figure 2-14

2. Click the **Households** tab in to display the **Households Overview** screen. **(1)** (See Figure 2-15)

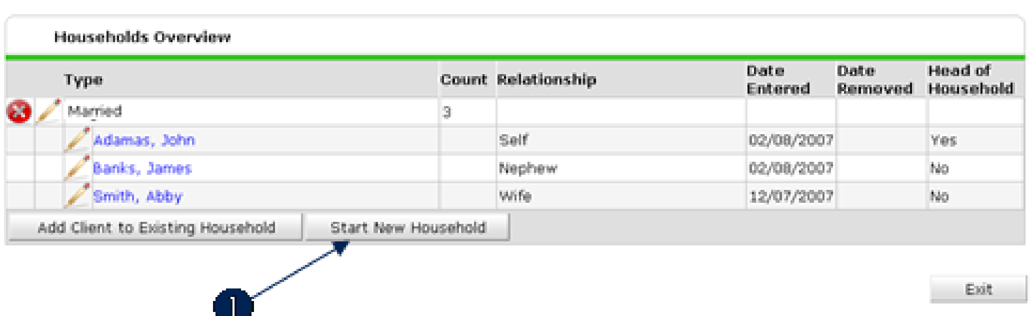

Figure 2-15

3. Click **Start New Household** to create a new household. **(1)** The **Add a New Household** screen will display. (See Figure 2-16)

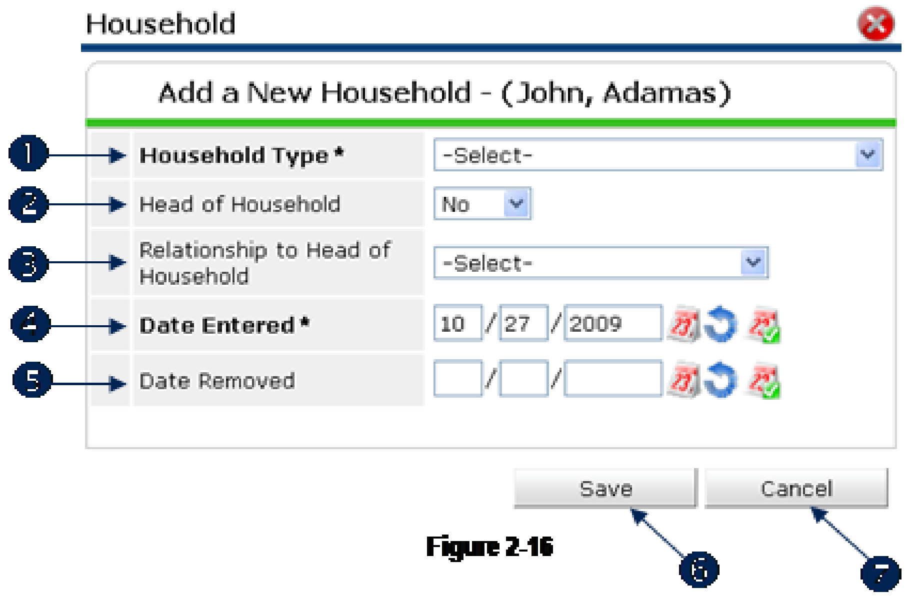

Figure 2-16

4. Select a **Household Type** from the pick list. **(1)**

5. Set the **Head of Household** indicator. **(2)** If this client is Head of Household, select **Yes,** otherwise select **No**.

Note: *The Head of Household field defaults to "No." The field need only be altered for the Head of Household.*

6. Select **Relationship to Head of Household** from the pick list. **(3)** If the client is the **Head of Household**, select **Self**.

7. The **Date Entered** defaults to the current date. **(4)** This is the date the client will be entered into the household. It is a required field.

8. **Date Removed** should remain blank until the client exits the household. **(5)**

9. Click **Save** to add the household. **(6)** The user will be returned to the **Household Overview** screen. The newly added household will display. (See Figure 2-17) Click **Cancel** to return to the previous screen without adding the household. **(7)**

Figure 2-17

10. Click the **Edit** icon to add household members. **(1)**

Edit a Household

1. Navigate to the **Client Information** tab. (See Figure 2-18)

Figure 2-18

2. Click the **Households** tab to display the **Household Overview** screen. **(1)** (See Figure 2-19)

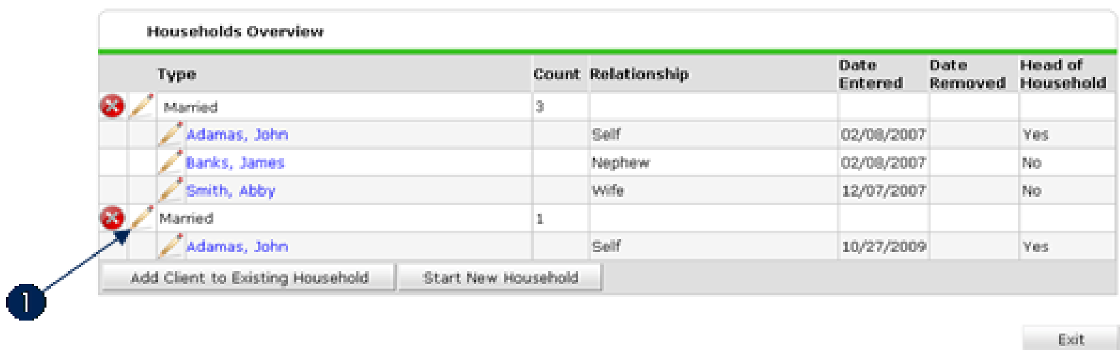

Figure 2-19

3. Click the Edit icon to edit a household. **(1)** The **Edit Household** screen will display. (See Figure 2-20)

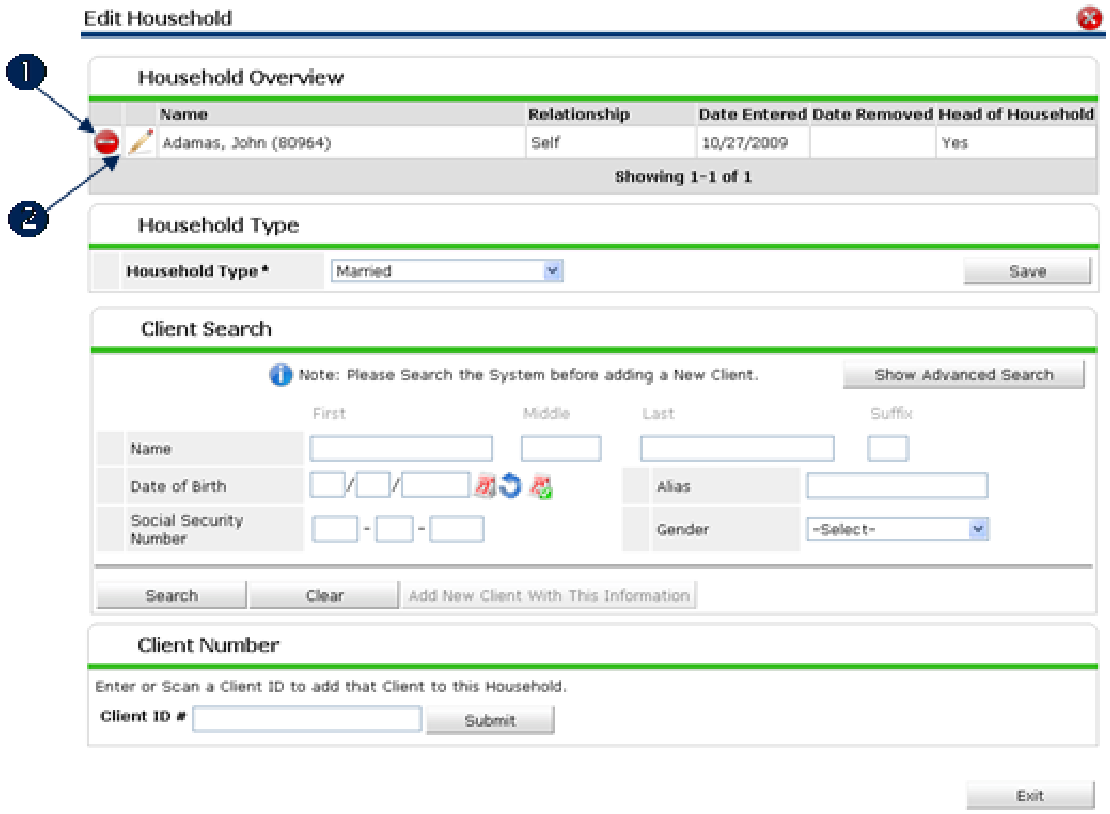

Figure 2-20

4. From the **Edit Household** screen, the user may remove or change household member information, alter the household type, and add clients to the household.

5. In the **Household Overview** area, click the **Red Minus** icon to remove a client from the household. **(1)** A confirmation screen will display. Click the **Edit** icon to adjust the client's household information. **(2)** The **Edit Household Member** screen will display. (See Figure 2-21)

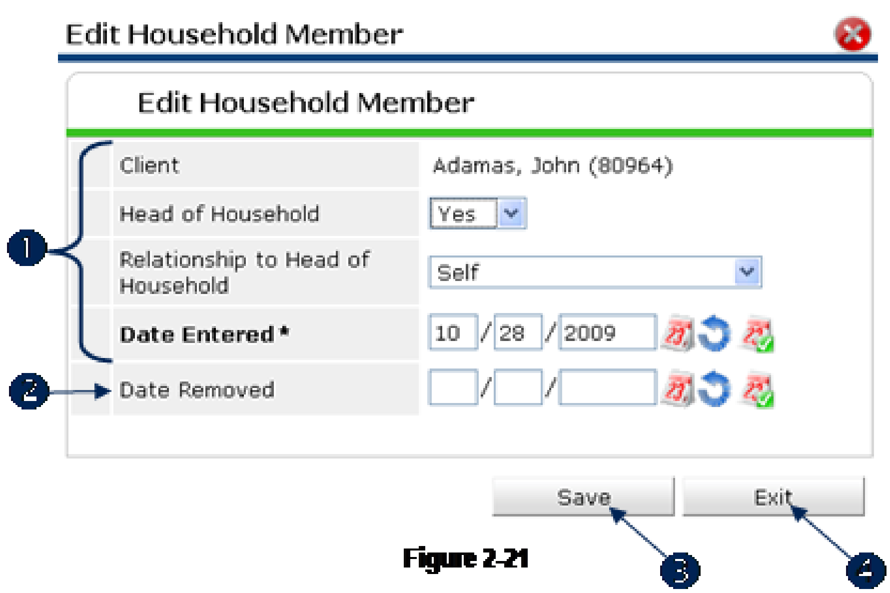

Figure 2-21

6. Adjust the available fields. **(1)** To remove a client from the household add a **Date Removed**. **(2)** Adding a **Date Removed** keeps the client listed in the household for historical reference, but the client

will not be counted as a household member.

7. Click **Save** to retain the changes and exit to the **Edit Household** screen. **(3)** Click **Exit** to return to the **Edit Household** screen without retaining the changes. **(4)** (See Figure 2-22)

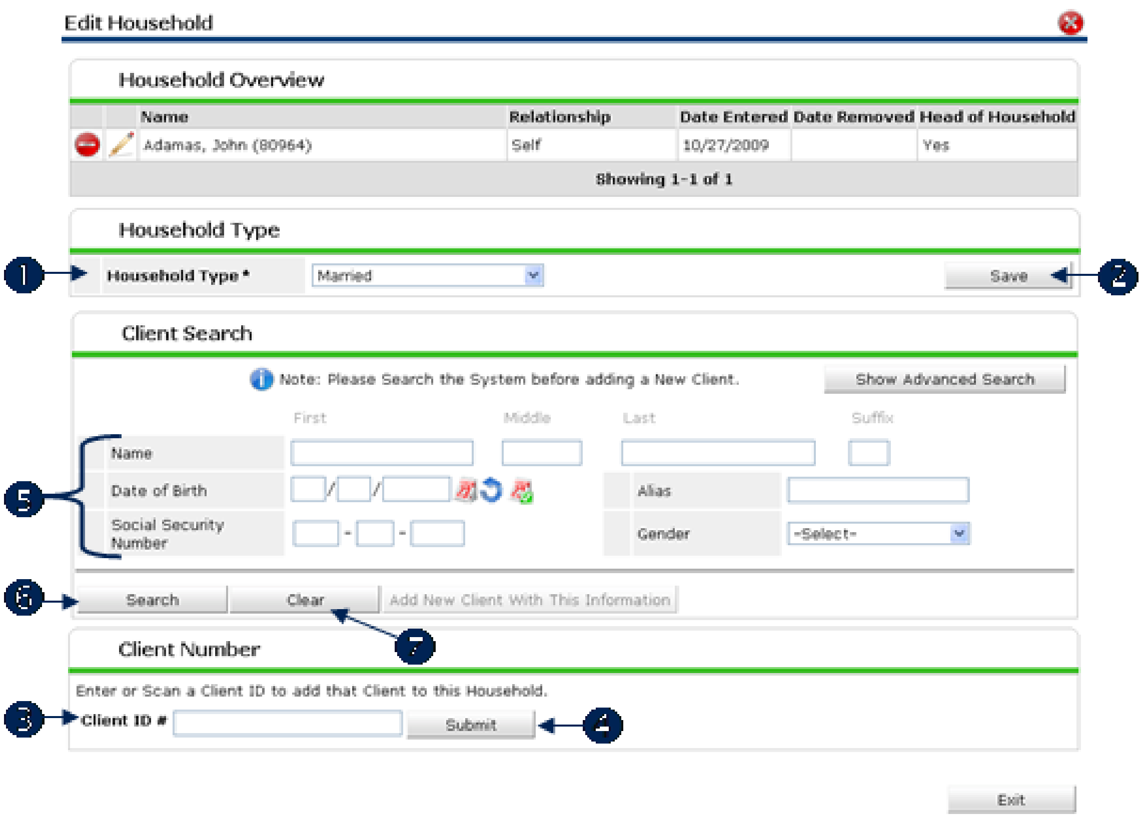

Figure 2-22

8. In the **Household Type** area, select a Household Type, **(1)**, from the pick list and click **Save** to retain the change. **(2)**

9. A client may be added to the household using the **Client Search** area or the **Client Number** area.

10. In **Client Number** enter a Client ID, **(3)**, and click **Submit** to be directed to the **Add New Household Member** screen. **(4)** (See Figure 2-24)

11. In **Client Search** enter the client's information into the search fields. **(5)**

12. Click **Search**. **(6)** The screen will refresh and the **Client Results** area may display a list of clients that are possible matches for the entered client information. (See Figure 2-23) Click **Clear** to reset the search fields. **(7)**

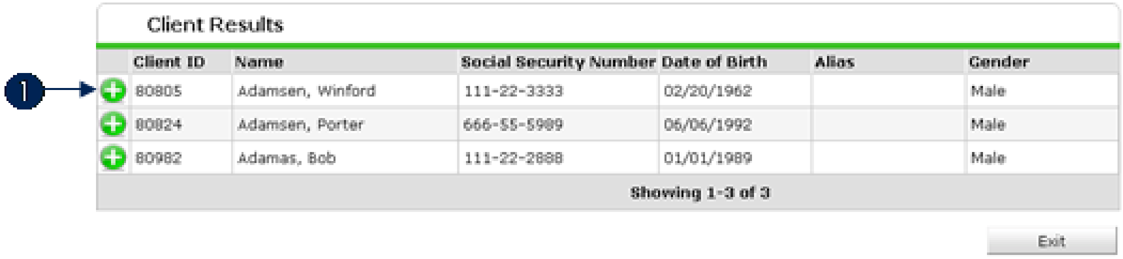

Figure 2-23

13. Click the **Green Plus** icon to add the client to the household. **(1)** The **Add New Household Member** screen will display. (See Figure 2-24)

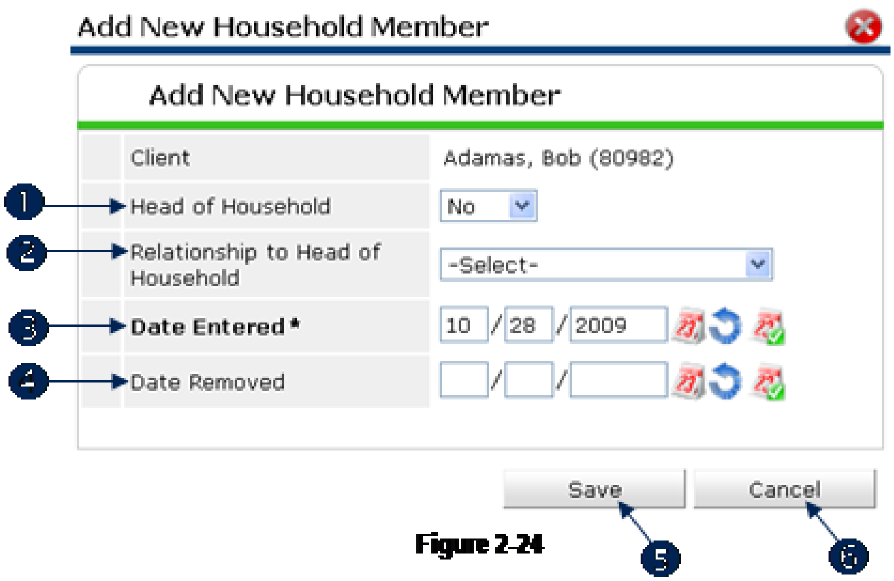

Figure 2-24

14. Set the **Head of Household** indicator. **(1)** If this client is Head of Household, select **Yes,** otherwise select **No**.

Note: *The Head of Household field defaults to "No." The field need only be altered for the Head of Household.*

15. Select **Relationship to Head of Household** from the pick list. **(2)** If the client is the **Head of Household**, select **Self**.

16. The **Date Entered** defaults to the current date. **(3)** This is the date the client will be entered into the household. It is a required field.

17. **Date Removed** should remain blank until the client exits the household. **(4)**

18. Click **Save** to add the new household member. **(5)** The user will be returned to the **Edit Household** screen. The newly added household member will be displayed. (See Figure 2-25) Click **Cancel** to return to the **Edit Household** screen without adding the household member. **(6)**

Figure 2-25

Add Client to Existing Household

1. Navigate to the **Client Information** tab. (See Figure 2-26)

Figure 2-26

2. Click the **Edit Household** tab in **Edit Household** to display the **Edit Household Overview** screen. **(1)** (See Figure 2-27)

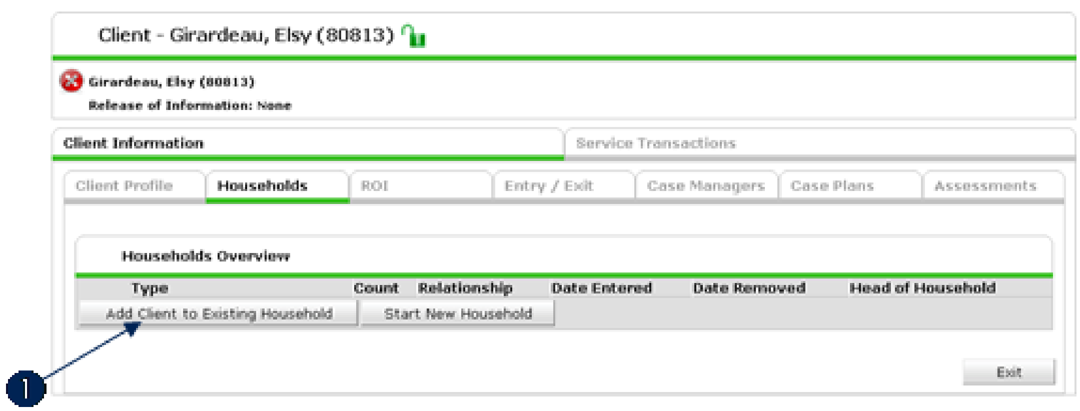

Figure 2-27

3. Click **Add Client to Existing Household** to add the client to an existing household. **(1)** The **Household Search** will display. (See Figure 2-28)

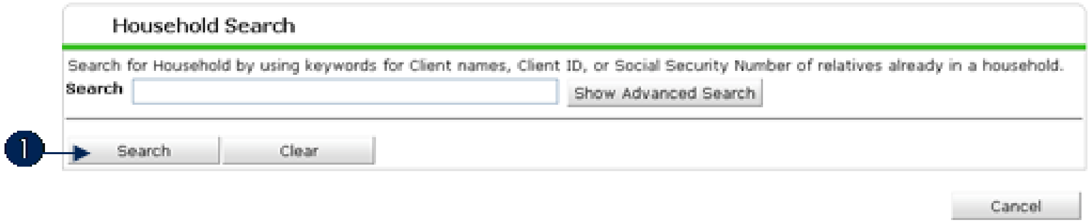

Figure 2-28

4. Enter the name of a client and click **Search**. **(1)** A list of households with matching members will appear. (See Figure 2-29)

Figure 2-29

5. Click the **Magnifying Glass** icon to view the members in each household. **(1)** (See Figure 2-30)

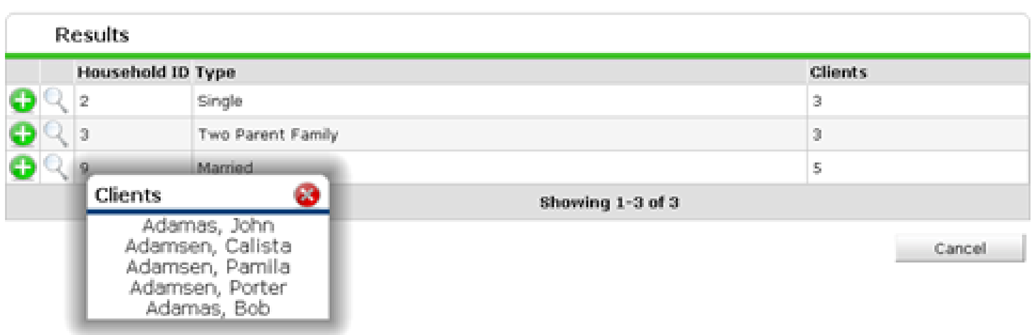

Figure 2-30

6. Close the pop up window and click the Green Plus icon to add the client to the selected household. The screen will refresh to the **Add New Household Member** screen. (See Figure 2-31)

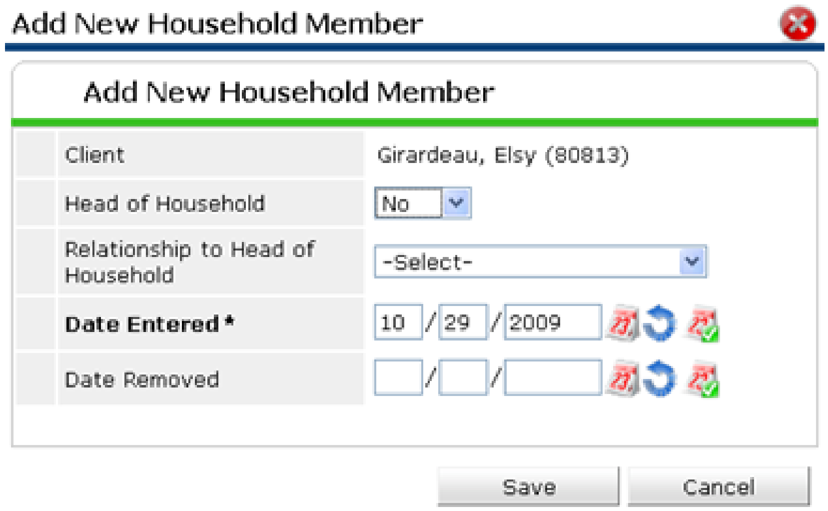

Figure 2-31

7. Use the **Head of Household** picklist **(1)** to indicate whether or not this client is the Head of Household. Select "Yes" if they are the Head of Household and "No" if they are not.

8. Select the client's **Relationship to Head of Household**. **(2)** If the client is the Head of Household, select "Self."

9. The **Date Entered** **(3)** is the date that the client entered into the Household in *ServicePoint*. By default, it will be set to the current date.

10. Enter the **Date Removed** **(4)** only if the client has already been removed from this household.

11. Click **Save**. **(5)** The screen will refresh and display the **Household Overview** screen. (See Figure 2-32)

Figure 2-32

Note: *Although you can delete clients from a household, you should only do so if the client is not a member of that household. If the client is a member of the household and you wish to remove them, then you should enter the date they were removed in the* ***Date Removed*** *field on the* ***Household*** *screen.*