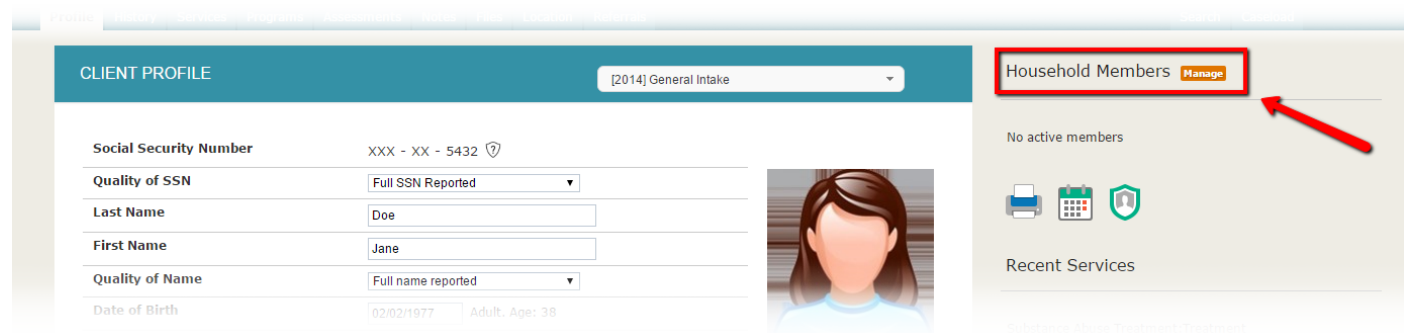


How do I create a family/household and manage members?

This section discusses how to create and manage families/households.

By default, a newly created client will not be a member of a Family or Household. While on any tab within a Client profile, the “Family/Household Members” section will be listed at the top of the right sidebar. This section will list any active Family/Household members for this client. In order to manage the Family/Household members, simply click the orange “Manage” button beside the section title.



The Family/Household management section allows two very convenient ways to add new members to your Family/Household, as well as manage program participation and service placement for the entire group. Both methods provide a convenient method of linking clients to programs and services.

These methods include:

1. Quick Add/Join Functionality from the Side Bar
2. Client Search

1. Quick Add/Join Functionality from the Side Bar

To begin, select the “Manage” icon/link at the top of the right sidebar. This will take you to the Family/Household Management search screen.

Jane Doe

Landen Scott, Bitfocus System

Profile History Services Programs Assessments Notes Files Location Referrals Search Caseload

HOUSEHOLD MANAGEMENT

Search for a Household Member

Search

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Previous Household History for

Head of Household	Members	Start	End
Jane Doe	0	06/20/12	12/01/15

[Back](#)

Managed with Clarity Human Services

Household Members

No active members

Your recent client searches accessed:

John Doe	6789
Antonio Gates	1111
Kevin Doe	0000
Bill Gates	1222
Frodo Baggins	6789
Landen Scott	2222

Within the right sidebar, your 10 most recently accessed clients will appear under the section titled “Your recent client searches accessed”. Generally, family/household members are added to the system sequentially, therefore they will likely be conveniently listed here.

HOUSEHOLD MANAGEMENT

Search for a Household Member

Search

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Previous Household History for

Head of Household	Members	Start	End
Jane Doe	0	06/20/12	12/01/15

[Back](#)

Managed with Clarity Human Services

Household Members

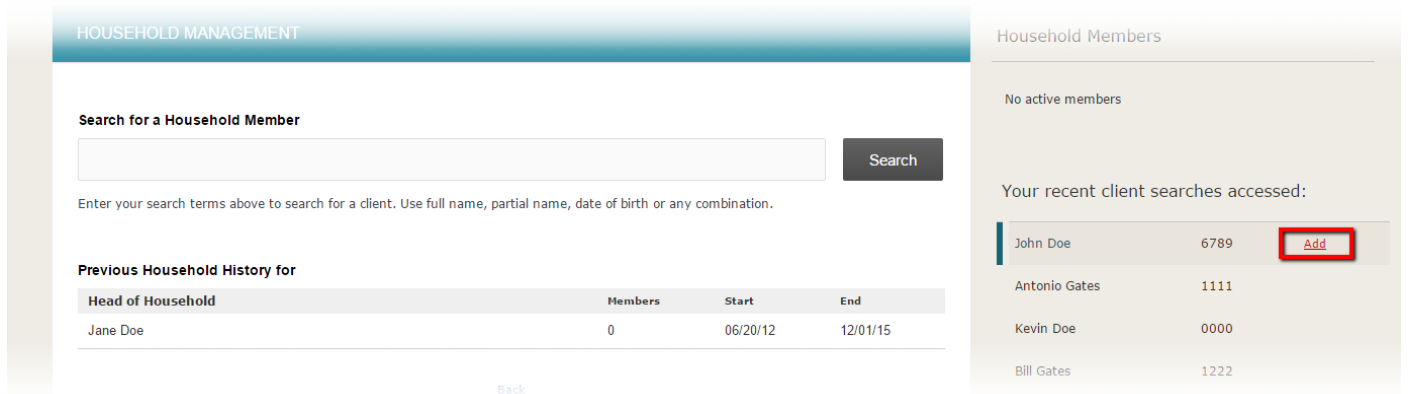
No active members

Your recent client searches accessed:

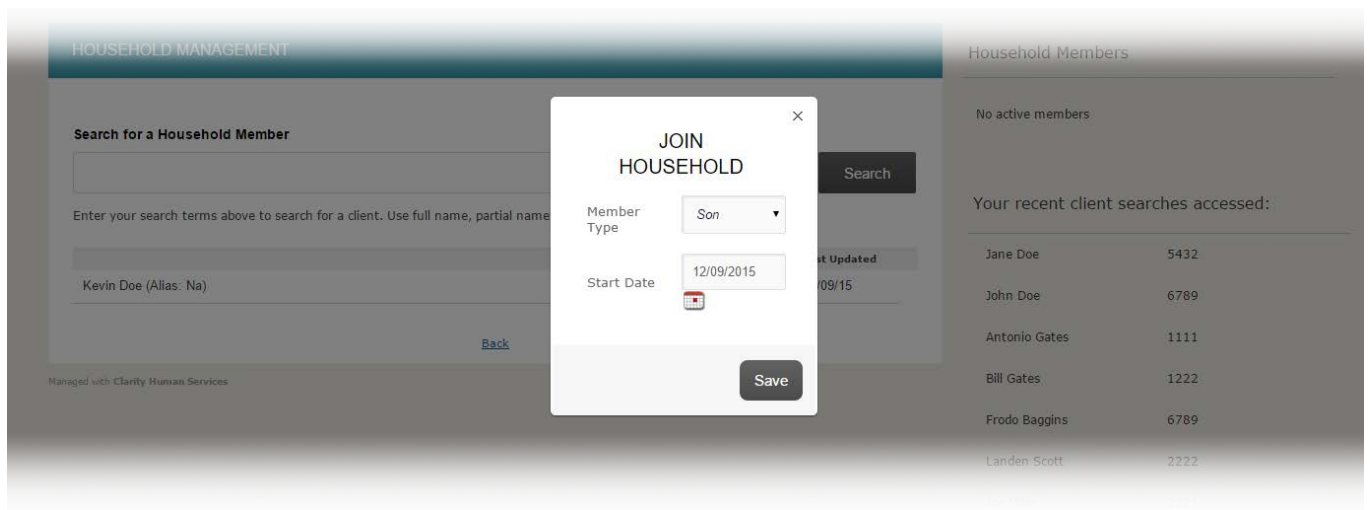
John Doe	6789
Antonio Gates	1111
Kevin Doe	0000
Bill Gates	1222
Frodo Baggins	6789
Landen Scott	2222
Joe Miles	2221
Bilbo Baggins	1230

Add

Clients that currently are not members of any Family/Household will be listed with the “Add” option when you hover over their name.



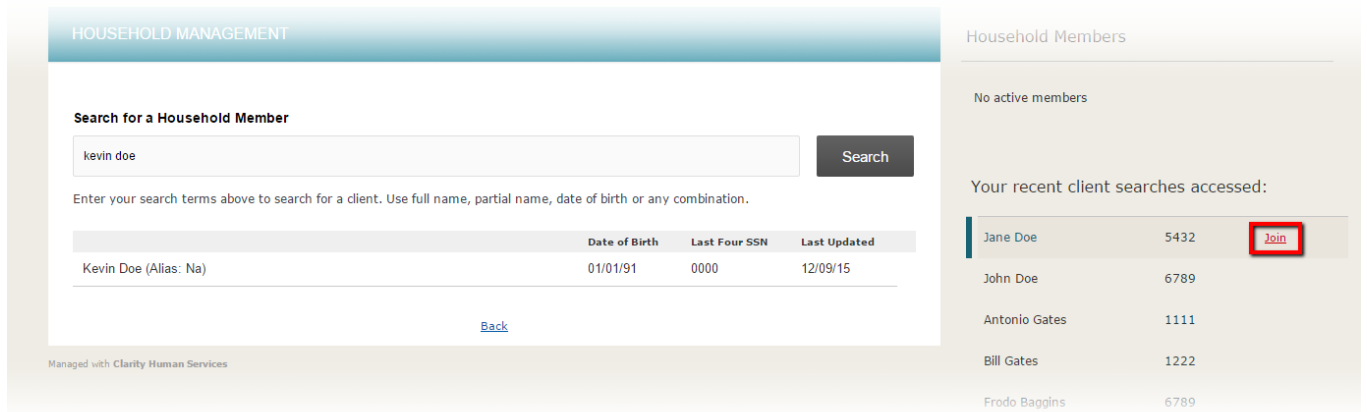
This is the most common scenario when adding members to a Family/Household. Simply selecting “Add” will display a window requesting a Member Type and Start Date.



Simply select the Member Type for the selected client from the dropdown menu, select a Start Date, and then select “Save”. This client will be successfully added to the family/household.

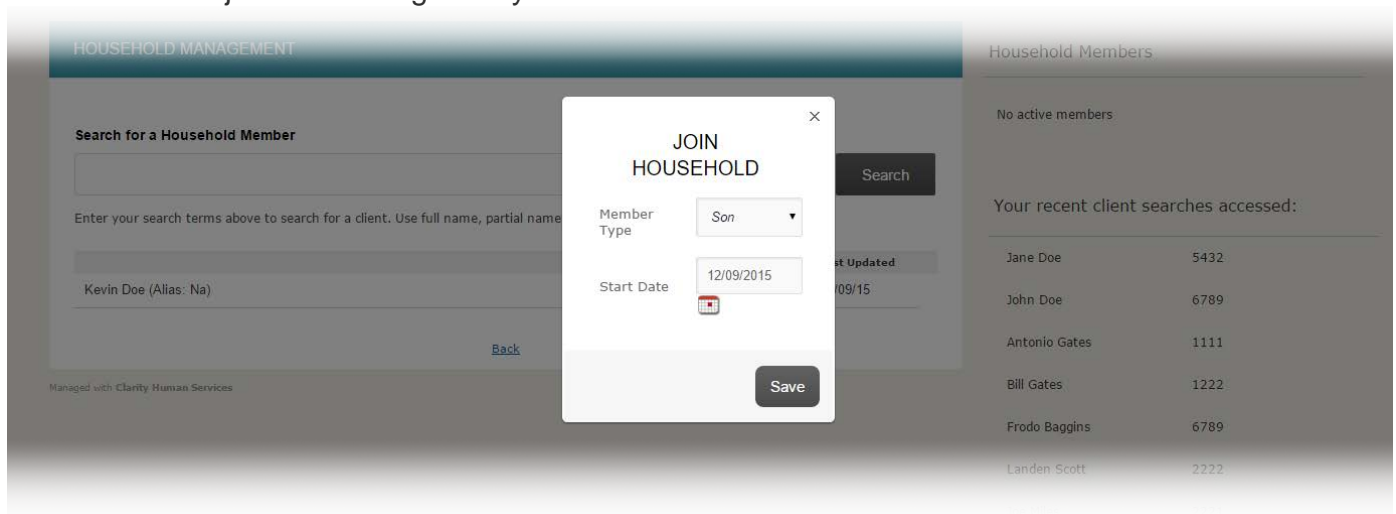
Join

When the client you are working with is not a member of another client’s household, “Join” will be displayed next to the other client’s name. In the example below, Kevin Doe is not yet added to the “Doe” family/household. However, the option to join both Jane Doe or John Doe’s family/household (which happens to be the same in this example) is available by selecting the “Join” link to the right of their names.



The Join option allows for two unique functions based on the Family/Household status of the current client:

Scenario 1. Current client has no active Family/Household members: This option allows the current client to join an existing Family/Household.



Scenario 2. Current client is already a member of a Family/Household: In this unique circumstance, Clarity allows you to make a decision.

- a.) *Would you like to have your current client leave their existing Family/Household to join another Client's Family/Household? If so, select 'Join'.*

HOUSEHOLD MANAGEMENT

Search for a Household Member

kevin doe Search

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
Kevin Doe (Alias: Na)	01/01/91	0000	12/09/15

Existing Group. Head of Household: Jane Doe. Members: 3

Household History

	Member Type	Member Start	Member End
Bill Gates	Father	12/09/15	12/09/15

Household Members

Antonio Gates	Son
Bill Gates	Father *

Your recent client searches accessed:

Kevin Doe	0000	Join
Jane Doe	5432	
John Doe	6789	
Frodo Baggins	6789	

When you select 'Join' you will see the following popup box:

HOUSEHOLD MANAGEMENT

Search for a Household Member

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

Bill Gates	Father	12/09/15	12/09/15
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Previous Household History for

Head of Household

Bill Gates
Jane Doe

Managed with Clarity Human Services

JOIN HOUSEHOLD ×

Active client is already in a Household. This action will end involvement in the current group and add as a member of the selected group.

Leave existing Household to join Kevin Doe's Household
 Transfer Kevin Doe from their existing Household to this Household

Existing Household

Existing End Date: 12/10/2015 📅

New Household

Member Type: Other ▼

Start Date: 12/10/2015 📅

Save

Household Members

Antonio Gates	Son
Bill Gates	Father *
Norman Gates	Son

Your recent client searches accessed:

Kevin Doe	0000
Jane Doe	5432
John Doe	6789
Antonio Gates	1111
Frodo Baggins	6789
Landen Scott	2222
Joe Miles	2221
Bilbo Baggins	1230
Fuscia Picket	6789

- b.) Would you like to transfer another client from their current Family/Household into your active client's Family/Household? If so, select 'Add'.

HOUSEHOLD MANAGEMENT

Search for a Household Member

[Search](#)

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

	Member Type	Member Start	Member End
Bill Gates	Father	12/08/15	12/09/15

Previous Household History for

Head of Household	Members	Start	End
Bill Gates	3	12/08/15	12/09/15
Jane Doe	3	12/09/15	12/09/15

[Back](#)

Managed with Clarity Human Services

Household Members

Antonio Gates	Son
Bill Gates	Father *
Norman Gates	Son

Your recent client searches accessed:

Kevin Doe	0000
Jane Doe	5432
John Doe	6789
Antonio Gates	1111
Frodo Baggins	6789
Landen Scott	2222
Joe Miles	2221
Bilbo Baggins	1230

2. Client Search

Using the same Add and Join functionality stated above, the Client Search function allows you to search the entire client database for a matching family member to join to your client's Family/Household group. A couple additional items are displayed in the Search results if the target client is found. These items include the existing group's Head of Household, and the number of members in that Family/Household.

HOUSEHOLD MANAGEMENT

Search for a Household Member

[Search](#)

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
Add Norman Gates	01/02/93	2142	12/09/15

Household History

Member Type	Member Start	Member End	
Bill Gates	Father	12/08/15	12/09/15

Household Members

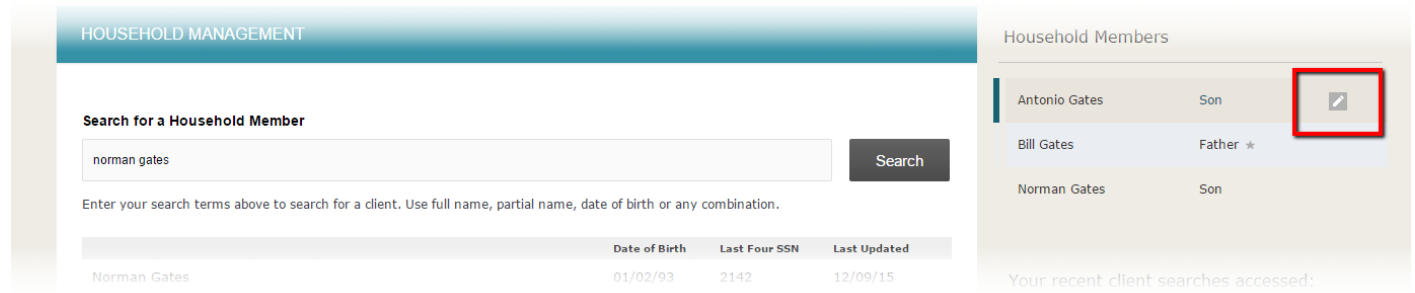
Antonio Gates	Son
Bill Gates	Father *

Your recent client searches accessed:

Norman Gates	2142
Kevin Doe	0000
Jane Doe	5432
John Doe	6789

Ending a Client's Family/Household Membership

Circumstances may arise when a Family/Household member needs to be removed from the group. To accomplish this task, simply click the "Edit" link beside any group member in the "Family/Household Members" section.



A popup box will appear. Check the Exited Household box and, in the End Date field, enter the date you wish to stop the client's participation in the group. The client will be considered a member until that date. After the date has passed, the client will automatically be removed from the group and listed in the Family/Household History section.

