# 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.
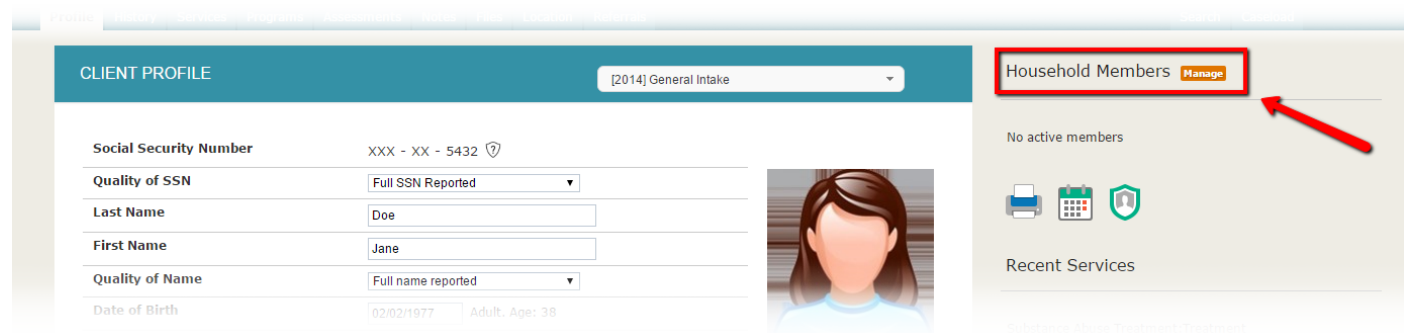


The Family/Household management section allows two very convenient ways to add new members to your Family/Household, as well as manage program participation and service placement for the entire group.  Both methods provide a convenient method of linking clients to                               programs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

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.



### Add

Clients that currently are not members of any Family/Household will be listed with the "Add" option when you hover over their name.
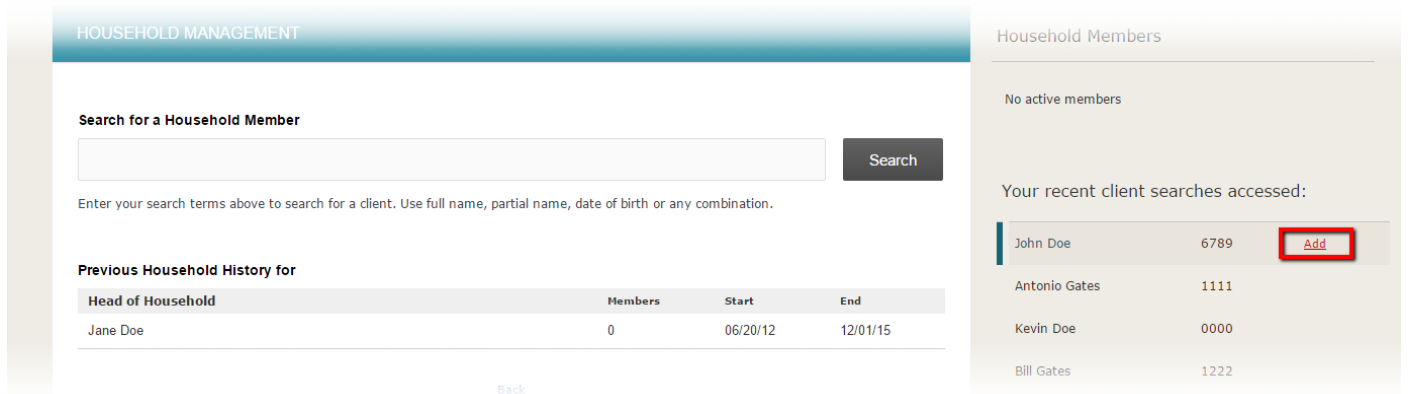
This is the most common scenario when adding members to a Family/Household. Simply selecting "Add" will display a window requesting a Member Type and Start Date.
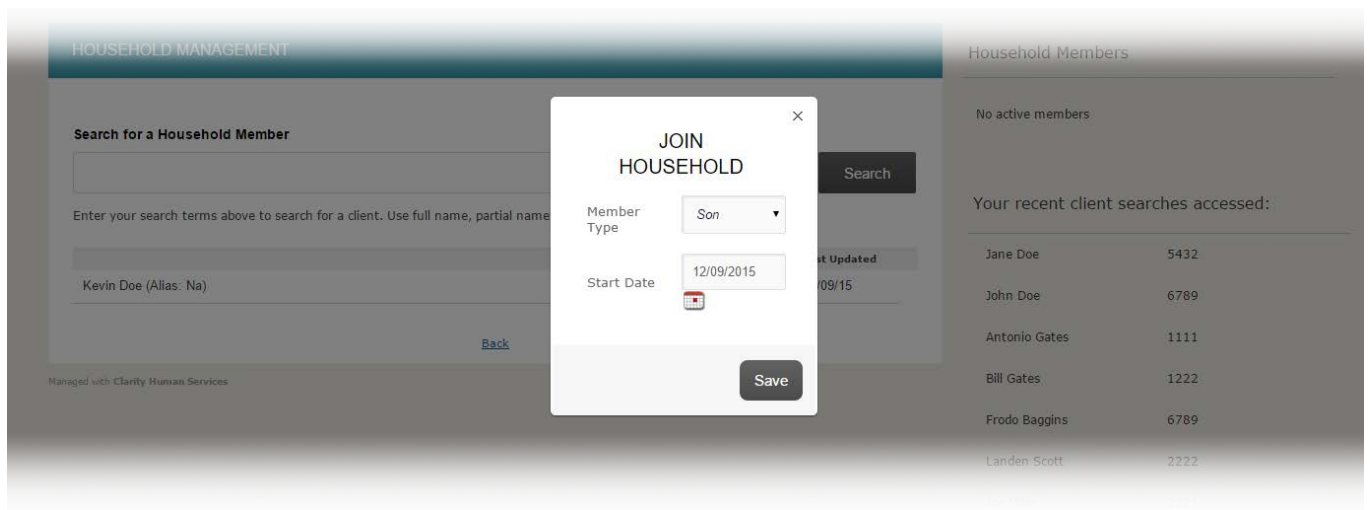


Simply select the Member Type for the selected client from the dropdown menu, select a Start Date, and then select "Save". This client will be successfully added to the family/household.
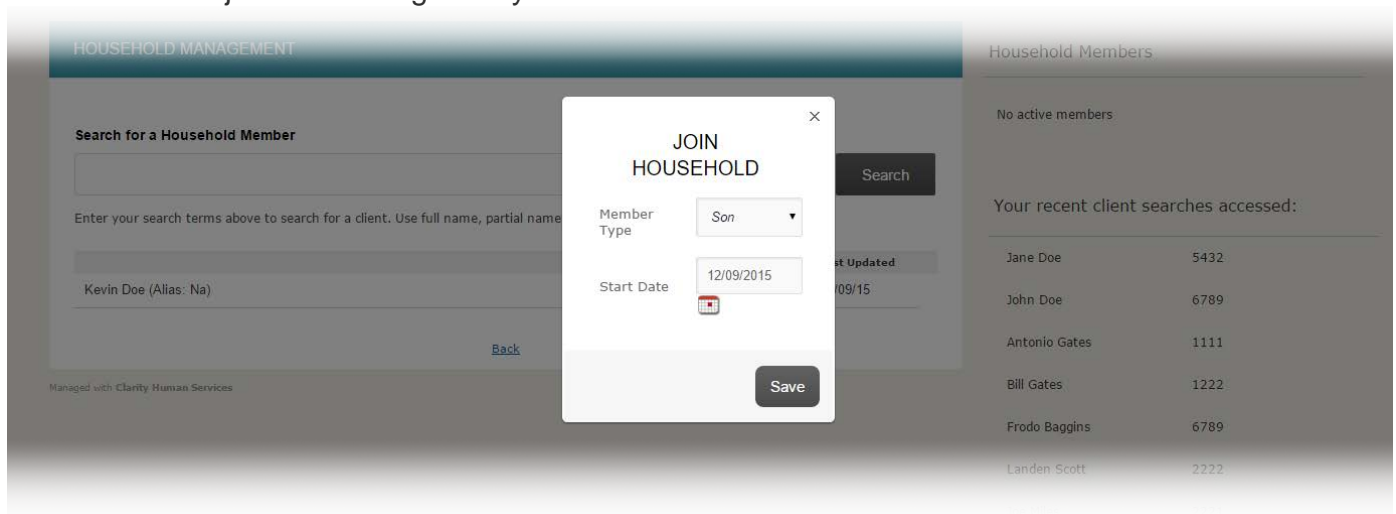
**Join**

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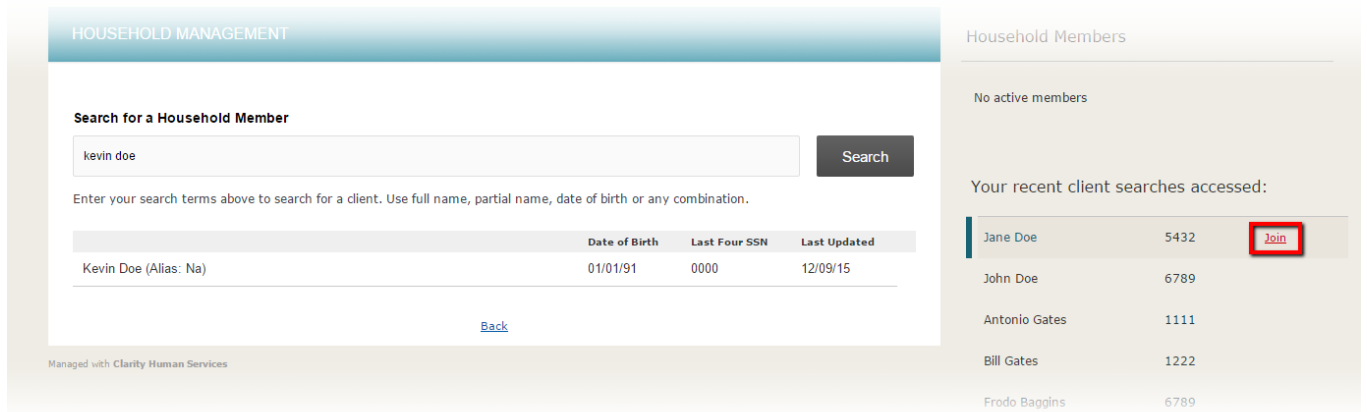
The Join option allows for two unique functions based on the Family/Household status of the current client:

**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'.

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



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

## 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.

# 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.
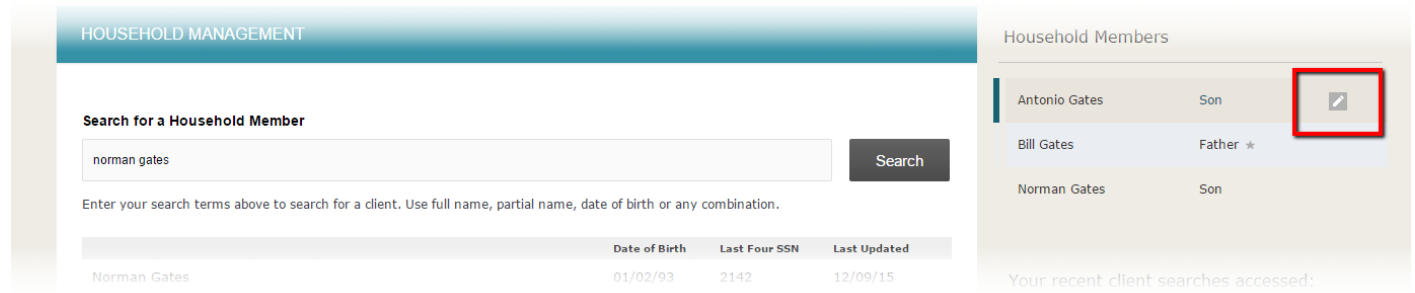


A popup box will appear. Check the Exited Household box and, in the End Date field, enter the date you wish to stop the client's participation in the group. The client will be considered a member until that date. After the date has passed, the client will automatically be removed from the group and listed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