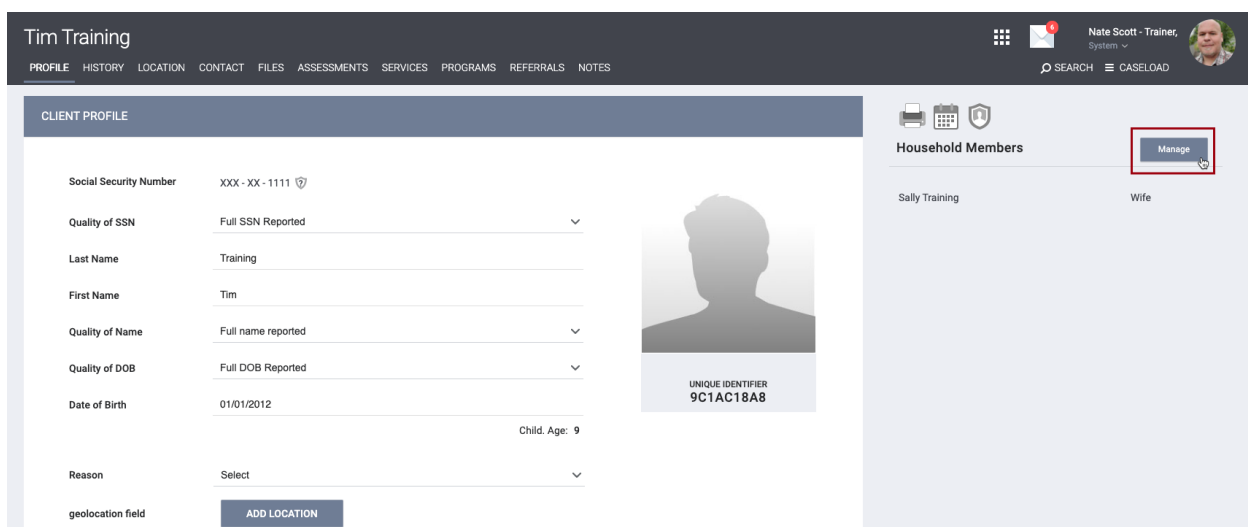# How Do I Create a Household and Manage Members?

By default, a newly created client record will not be associated with a Household. When you are on any tab within a client record, you will see the *Household Members* section at the top of the right sidebar. This section will list any active Household members associated with the client record. To manage the Household members, click the *Manage* button.

The Household management section allows two ways to add new members to a Household, as well as to manage program participation and service placement for the entire group:

- Quick Add/Join Functionality from the Side Bar
- Client Search

Both methods provide a method of linking client records to programs and services.

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 Household Management search screen.

Within the right sidebar, your 10 most recently accessed client records will appear under the section titled *Your recent client searches accessed*. Generally, Household members are

added to the system sequentially, therefore they will likely be listed here. If the Household members are not listed in the recent search section, search for them in the search bar.

Add

Client records that currently are not members of any Household will be listed with the *Add* option which looks like a plus sign when you hover over the name. This is the most common scenario when adding members to a Household.

Selecting *the plus icon* will display a window requesting a Member Type and Start Date. Select the Member Type for the selected client record from the dropdown menu, select a Start Date, and then select *Save*. This client record will be added to the Household.

Join

You may notice that some client records under *Your recent client searches accessed* have a *Join* icon that looks like merging arrows button rather than a plus icon. This means that the client record is already a member of a different Household.

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

Scenario 1:

Current client record (Pumba Warthog) has no active Household members. This option allows the current client to join an existing Household.

You can add the client to the Household by clicking the *Join* button.

Scenario 2:

Current client record (Pumba Warthog) is already a member of a Household. A client record cannot be a member of two distinct Households at the same time, so Clarity Human Services allows you to make a decision. When you select *Join*, a pop-up will appear with the options:

- Leave existing Household to join another client's (Mufasa Lion's) Household
- Transfer other client (Mufasa Lion) from their existing Household to this Household

Select the appropriate option and enter the *Existing Household End Date* and *New Household Member Type* and *Start Date*. Then select *SAVE*.

In this example, Pumba Warthog already had a Household with Timon Meercat and tried to join Mufasa Lion. A pop-up appeared asking whether Pumba should leave the existing Household to join Mufasa Lion's Household or if Mufasa Lion should transfer from their existing Household to this Household.

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 your client's Family/Household group. If the target client is found, additional items that are displayed in the Search results will include the existing group's Head of Household and the number of members in that Household.

Ending a Household Membership

Circumstances may arise when a Household member needs to be removed from the group. To accomplish this task, click the *Edit* link beside any group member in the *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 record will automatically be removed from the group and listed in the Household History section.

Note:

- *The Exited date cannot be earlier than the Joined Household date.*
- *If the household member being exited is currently designated as Head of Household, you'll be prompted to assign a new Head Of Household before completing the task.*

If a client is accidentally exited from a household and needs to be "reactivated" into it, simply follow the same steps as ending the household membership, toggling off *Exited Household*.

Household History

Clicking the *Manage* button from any household member's client record will display options for viewing a history of clients previously in the household as well as the selected client's household history.
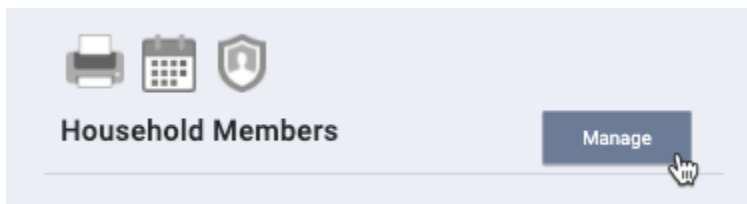
In the example below, we see there is one client in the *Household History* section. That means that, for this household, the client listed was previously in the household but is no longer in it. We also see one client in the *Previous Household History* section. That means that this client was previously in a household with the client listed.

Household History

Client	Member Type	Member Start	Member End
Mason Jaynes	Not Set	07/01/2020	07/14/2020

Previous Household History for Izabella Jaynes

Head of Household	Members	Start	End
Michelle Jaynes	3	06/05/2014	07/01/2020

A client can only be in one household at any given time. When attempting to "reactivate" a client into a household by toggling off *Exited Household*, the system will check if that client is either already in the household or in another household. If they are, an error message will display and you will not be able to reactivate the client to the household.

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Client cannot be reactivated in this Household because client is already active in another household.

Cancel OK