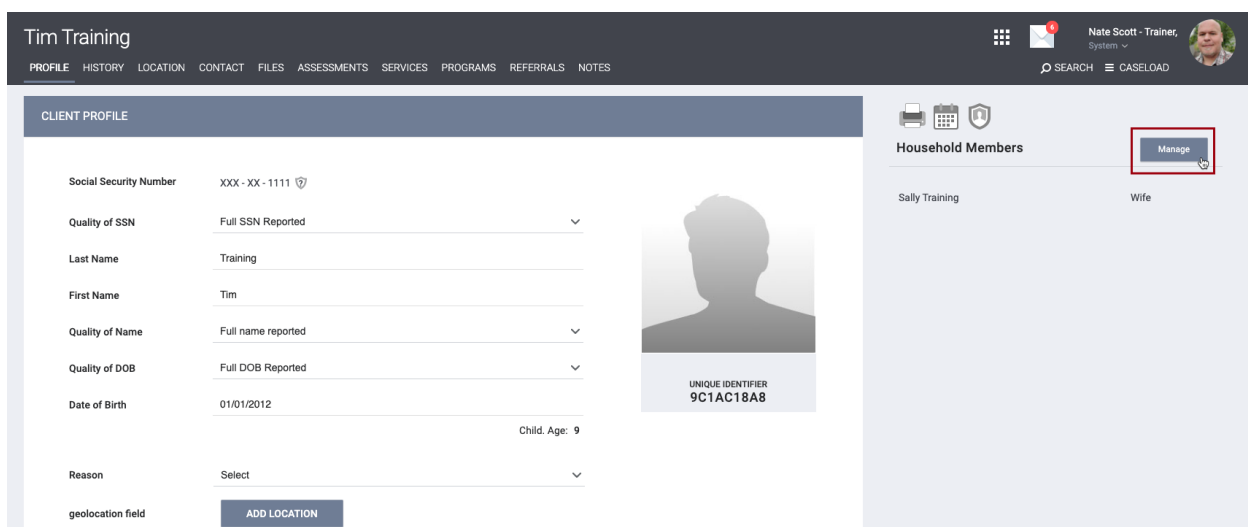


How Do I Create a Household and Manage Members?

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 screenshot shows a web interface for a client named Tim Training. The top navigation bar includes the client name and various tabs: PROFILE, HISTORY, LOCATION, CONTACT, FILES, ASSESSMENTS, SERVICES, PROGRAMS, REFERRALS, and NOTES. On the right, there is a user profile for Nate Scott - Trainer, System, with a search icon and CASELOAD link. The main content area is divided into two sections. The left section, titled 'CLIENT PROFILE', contains a form with fields for Social Security Number (XXX - XX - 1111), Quality of SSN (Full SSN Reported), Last Name (Training), First Name (Tim), Quality of Name (Full name reported), Quality of DOB (Full DOB Reported), Date of Birth (01/01/2012), Reason (Select), and a geolocation field with an 'ADD LOCATION' button. A silhouette of a person is shown with a 'UNIQUE IDENTIFIER 9C1AC18A8' and 'Child. Age: 9'. The right sidebar, titled 'Household Members', lists 'Sally Training' and 'Wife'. A 'Manage' button is highlighted with a red box.

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.

The screenshot shows the Daffy Duck software interface. At the top, there is a navigation bar with the logo 'Daffy Duck' on the left and user information 'Zoey Keeper, Help Center Agency' on the right. Below the navigation bar, there are several menu items: PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, REFERRALS, LOCATION, and FILES. A search bar and a 'CASELOAD' button are also visible.

The main content area is titled 'HOUSEHOLD MANAGEMENT'. It features a search form with the heading 'Search for a Household Member'. The form includes a text input field and a 'SEARCH' button. Below the input field, there is a placeholder text: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' A 'BACK' button is located below the search form.

On the right side of the interface, there is a section titled 'Household Members' which currently displays 'No active members'. Below this, there is a section titled 'Your recent client searches accessed:' which contains a list of client records. This list is highlighted with a red border in the screenshot.

Your recent client searches accessed:	
Rafiki Baboon	1111
Mufasa Lion	4589
Marlin Clownfish	7898
Daisy Duck	1329
Bob Schmo	0934
Sarabi Lion	2545
Brad Gardner	5685
Chance Gardner	8999
Nemo Clownfish	9823
Lacy Culpepper	5543

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.

The screenshot displays the 'I Am Batman' web application interface. At the top, there is a dark navigation bar with the logo 'I Am Batman' on the left and user information 'Nate Scott, Housing Test Agency' on the right, including a profile picture and a 'CASELOAD' button. Below the navigation bar, the main content area is divided into two sections. On the left, under the heading 'HOUSEHOLD MANAGEMENT', there is a search box titled 'Search for a Household Member' with a 'SEARCH' button. Below the search box is a placeholder text: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' Underneath this is a section titled 'Household History' with a faint icon of a document. On the right side, there is a 'Household Members' section with a table listing members: 'I Am Batman' (Father *) and 'I Am Robin' (Son). Below this is a section titled 'Your recent client searches accessed:' with a table listing recent searches: 'Bruce Wayne' (0000), 'Wayne Campbell' (1111), and 'Russel Crow' (1651).

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.

Pumba Warthog

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

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.

BACK

Managed with Clarity Human Services

Household Members

No active members

Your recent client searches accessed:

Mufasa Lion	4589	>>
Daffy Duck	0459	
Rafiki Baboon	1111	
Marlin Clownfish	7898	
Daisy Duck	1329	
Bob Schmo	0934	
Sarabi Lion	2545	
Brad Gardner	5685	
Chance Gardner	8999	
Nemo Clownfish	9823	

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*.

Pumba Warthog

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

HOUSEHOLD MANAGEMENT

JOIN HOUSEHOLD

Household Members

Pumba Warthog Other

Timon Meercat Other

Your recent client searches accessed:

Daffy Duck 0459

Rafiki Baboon 1111

Mufasa Lion 4589

Marlin Clownfish 7898

Daisy Duck 1329

Bob Schmo 0934

Sarabi Lion 2545

Brad Gardner 5685

Search for a Household Member

Enter your search terms above to search for a

Managed with Clarity Human Services

EXISTING HOUSEHOLD

Existing End Date 11/03/2017

Head of Household Timon Meercat

NEW HOUSEHOLD

Member Type Not Set

Start Date 11/03/2017

SAVE

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 Mufasa Lion's Household

Transfer Mufasa Lion from their existing Household to this Household

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.

Pumba Warthog

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

HOUSEHOLD MANAGEMENT

Search for a Household Member

rafiki SEARCH

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

Client	Date of Birth	Last Four SSN	Last Updated
Join Rafiki Baboon Existing Group. Head of Household: Mufasa Lion . Members: 6	03/09/00	1111	08/28/17

BACK

Household Members

Pumba Warthog	Other *
Timon Meercat	Other

Your recent client searches accessed:

Daffy Duck	0459
Rafiki Baboon	1111
Mufasa Lion	4589
Marlin Clownfish	7898
Daisy Duck	1329

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.



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.

BACK

Managed with Clarity Human Services

Household Members

Simba Lion	Son
Mufasa Lion	Father *
Nala Lioness	Other
Scar Lion	Brother
Sarabi Lion	Wife
Rafiki Baboon	Uncle

Your recent client searches accessed:



Pumba Warthog	0923
Daffy Duck	0459
Marlin Clownfish	7898
Daisy Duck	1329
Bob Schmo	0934
Brad Gardner	5685

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*.

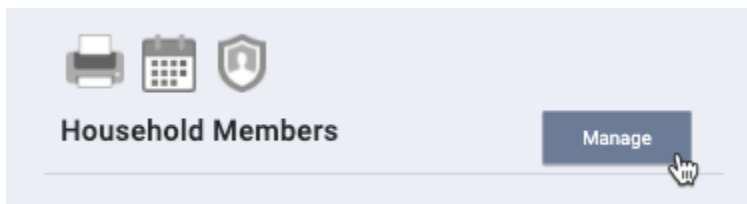
EDIT GLOBAL HOUSEHOLD ✕

Member Type	Son	▼
Head of Household	Mason Jaynes	▼
Joined Household	06/05/2014	
Exited Household	<input checked="" type="checkbox"/>	
	07/01/2020	

SAVE

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.

