

## Step 3 (Households and Families ONLY - SKIP for Individuals)

When adults or unaccompanied minors are seeking services together, they can be entered as a **household** in Clarity. A couple or people seeking services together do not need to be married to be entered in a **household**. For example, an adult, sibling, and grandmother may seek services together. They would be entered as a **household**.

A parent seeking services with his/her children are always entered as a **household**.

These are two key situations for entering clients as a household. **In order to be counted as “Family Members” in the HUD APR, clients must be entered in a household BEFORE enrolling in the Program.**

### Types of households

- **Head of Household:** data collection is limited to the head of household. Head of household is the term used in these standards for consistency with other guidance previously developed and does not necessarily indicate the individual’s status in the household. CoCs and HMIS Lead Agencies may elect to further define the head of household for their jurisdiction or may also substitute the concept of “primary client” for the term.
- **Head of Household and Adults:** data must be collected about the head of household and each additional adult in the household. If the household is composed of an unaccompanied child, that child is the head of household. If the household is composed of two or more minors, data must be collected about the minor that has been designated as the head of household.

Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 may be provided by the head of household who is applying for services. The children are not required to be present at the time the head of household applies for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the project on the same day as the head of household. Information for these children should be recorded when the children join the project. Information on any other adults (18 years of age or older) who are enrolled in the project as part of the household should be obtained directly from that adult. As a general rule, one adult should not provide information for another adult. A project should edit the project entry record of a client who turns 18 after entry, but before exit, to add a response for data elements only relevant to the head of household and other adults in the household in order to improve the reported overall data quality for the project or if required by a funder.

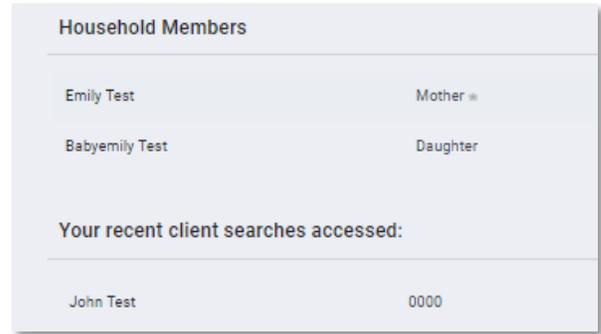
- **All Clients:** data must be collected about each adult and child in a household

### Creating Family/Household Groups

1. Verify that each family/household member exists in the HMIS. If they do not exist, complete the above steps for **“Adding a New Client”** to create a profile for each family member.
2. Open the profile for the “Head of Household”, in this example, Client X. In the upper-right corner, under the header “Household Members”, select “Manage”.



- If you have recently accessed the family member profiles, they will be listed on the right-side menu under the header, "Your recent client searches accessed". If the family member is listed there, hover over the member's name to produce a ⊕ to Add them to the head of households group.

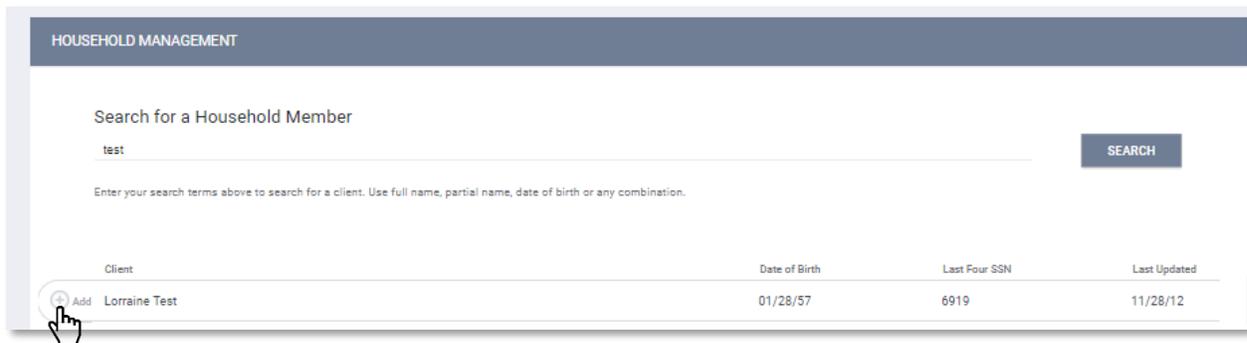


**NOTE: Two Ways to Group**

When a listed client has ➡ (Join) as an option instead of ⊕ (Add), that person is already part of an existing family/household group. Rather than adding them to your client's group, you are being given the option of joining your client to the *existing* group (ie, in above image, we can either add Client X to John's existing household, or we can add Jane to Client X's household, where Client X is the active profile and the head of household).



- You also have the option of searching for members directly from the Family/Household screen, which you can access from the Client profile > "Manage" Household Members. From the search results, mouse over the client name to produce the "Add" (or "Join") option.



- Enter the **Member Type** and **Start Date** (date the client became a member of the family/household) and save.

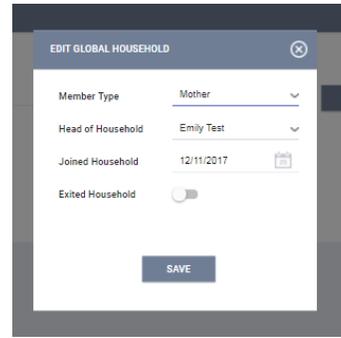
- Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper-right corner of your screen. (The Head of the Household will be indicated with a star next to their name)



## When a Member Leaves the Household

If a member leaves the household, clicking “Edit” from the Household Members list in the Household Management screen. This will allow you to enter an End Date to remove them from the group.

**This will remove them from the household and retain a historical record of their time in the group.**



## Step 4 - Enrolling Clients into Programs

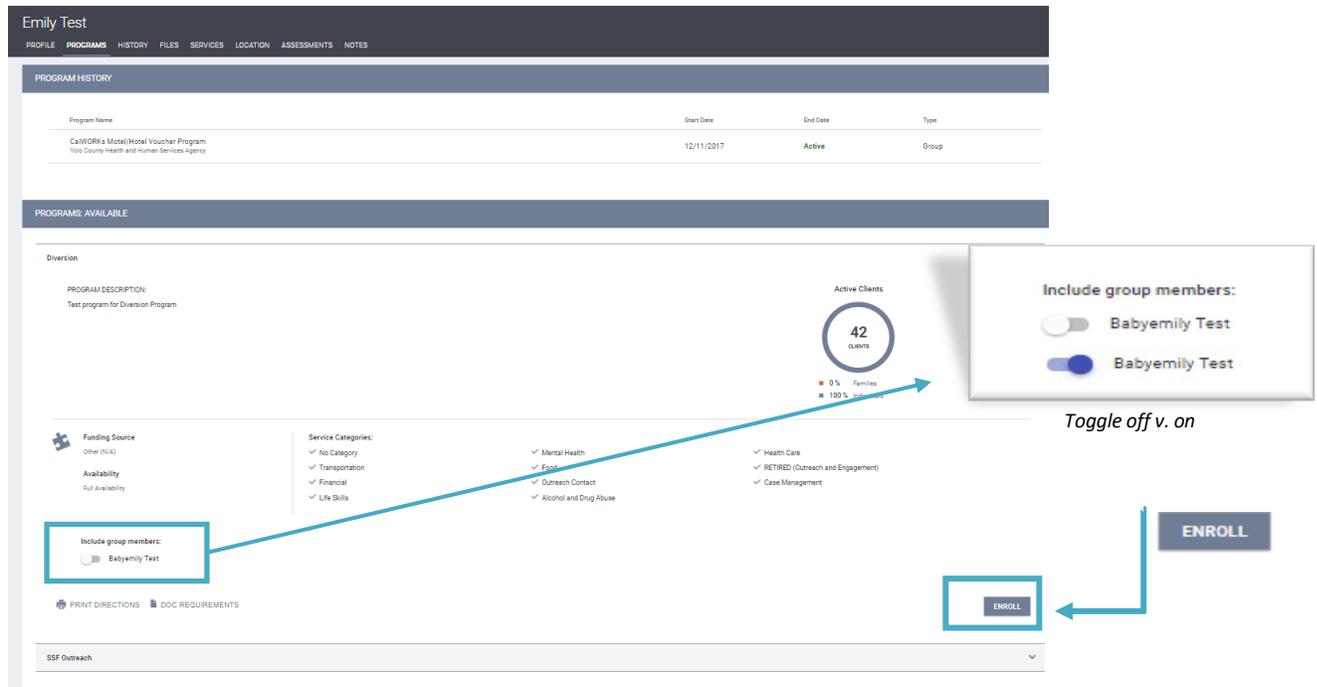
The **Programs tab** in the client file contains the following sections:

**Program History:** A list of programs your client is either currently enrolled in or has been enrolled in the past.

**Programs:** Available lists current programs provided by your agency that are available for client enrollment.

## Enrolling a Client/Household into a Program

1. Select the down arrow  next to the applicable available program to expand program details.
2. If the client is part of a group, you will be given the **option add group members**. Toggle on those group members you wish to include, if applicable. (Note: If the enrollment is the result of a referral, the toggle will already be on - please keep this toggle position to ensure the referral results are properly tracked.)
3. Select “Enroll”



The screenshot displays the client file for Emily Test, specifically the Programs tab. The 'PROGRAMS AVAILABLE' section is expanded for the 'Diversion' program. The 'Include group members' section shows 'Babyemily Test' toggled on. An 'ENROLL' button is highlighted with a red box and an arrow pointing to it. A callout box shows the 'Include group members' section with a 'Toggle off v. on' label.