JOB AID: CREATING AND MANAGING HOUSEHOLDS

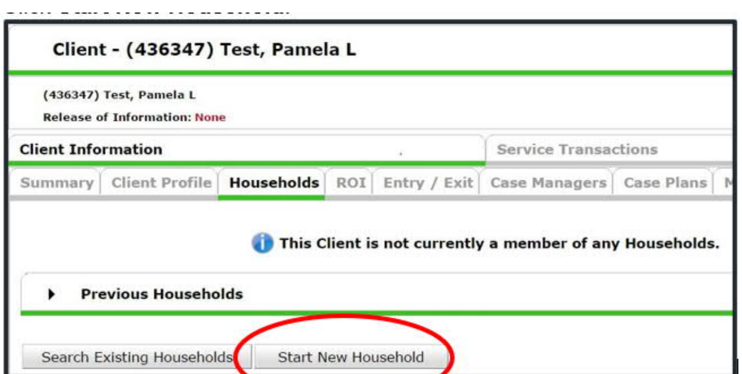
INTRODUCTION

Following are steps for creating and managing households in ServicePoint. The initial step for client data entry must be done prior to adding Household Members. Please refer to the grant specific workflows. Use the Enter Data As function if not already in the correct program. Use the Back Date function if not already in backdate mode (time set to 2:00 AM).

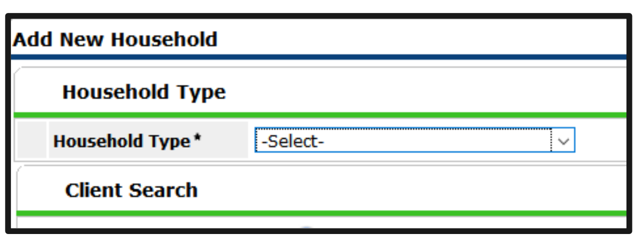
CREATING A NEW HOUSEHOLD

Households are created when more than one client is seeking services together as a unit. Households are not created for single individuals.

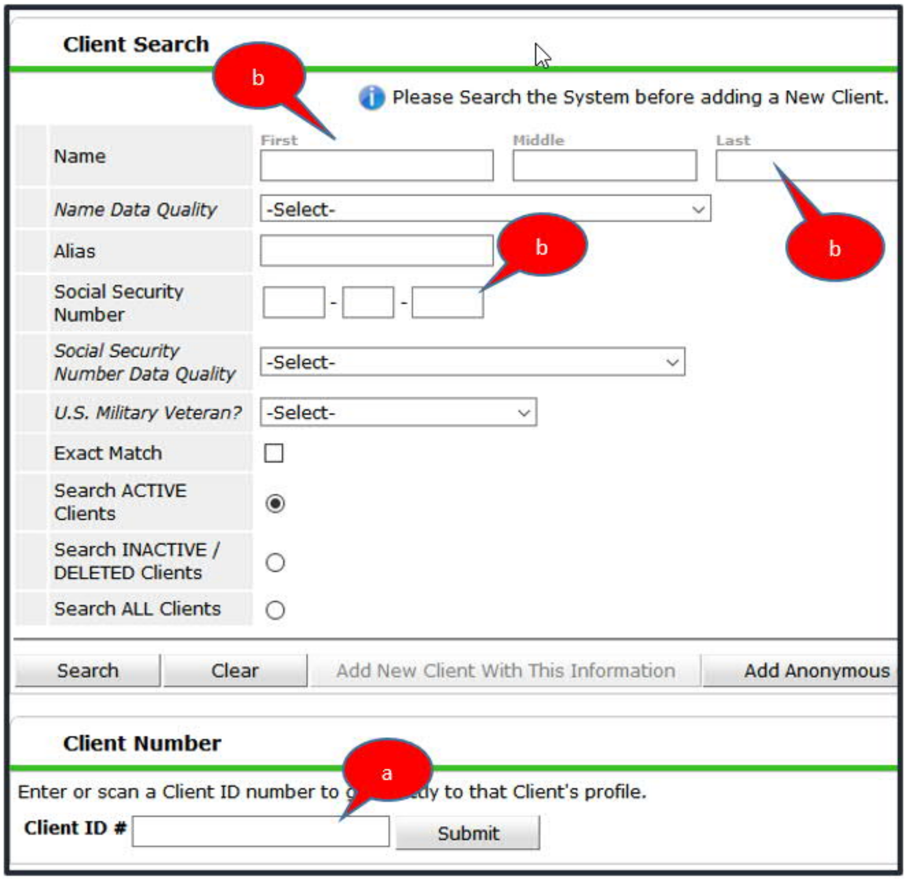
1. Click the Household Tab.
2. Click Start New Household.



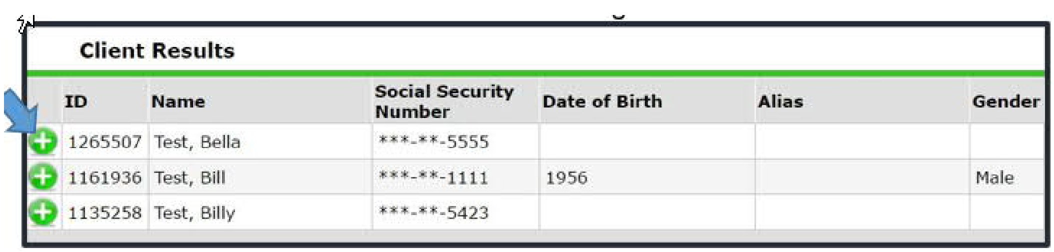
3. Select the Household Type from the dropdown list of options.



4. Locate existing or Add new HH member.
   a. If the client is already in ServicePoint and you know the Client's ID# enter it in the ID number section and click on Search.
   b. If you don't have a Client ID for a household member, enter the client's First and/or Last Name and/or partial SS# and click on Search.



If the client is already in ServicePoint, he or she will be displayed under Client Results. Click the Green Plus sign from the results list.



If the household member is not located through search, complete Name Data Quality, Alias (if applicable), Full SSN, SSN Data Quality and U.S. Military Veteran (if an adult) data fields.

IMPORTANT: Be sure to add the Full SSN; if not, a HAND System Administrator will need to enter it.

c. Click on Add New Client with This Information. Click OK.

All clients in the household will appear at bottom of screen under Selected Clients.

Selected Clients

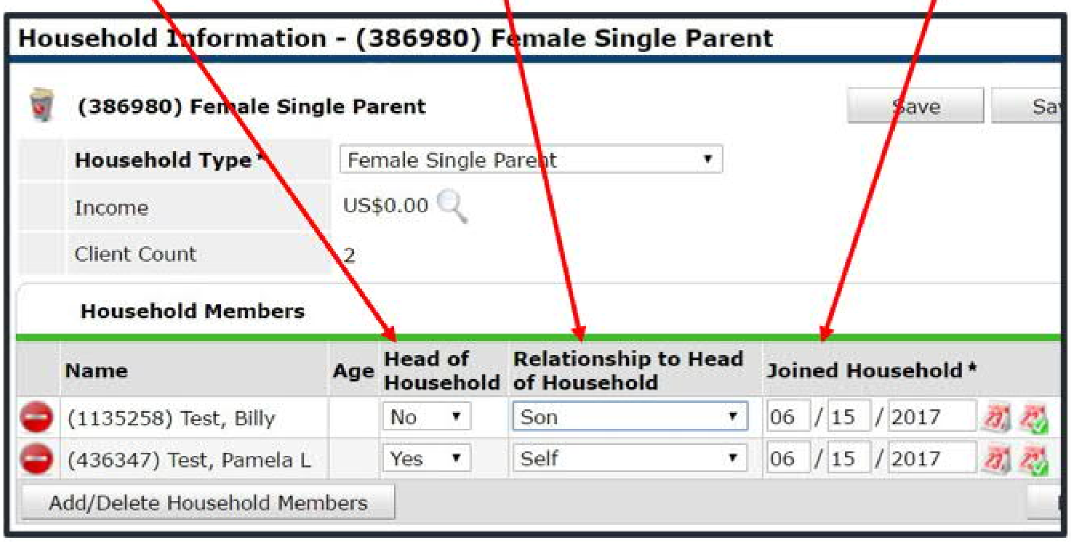
	ID	Name	Social Security Number	Date of Birth	Alias	Gender
	1135258	Test, Billy	***-**-5423			
	436347	Test, Pamela L	***-**-6514	1978		Female

d. Continue Step 4a through 4c until all HH members have been added (or selected).

e. Click Continue.

5. For each Household member, complete the following fields:

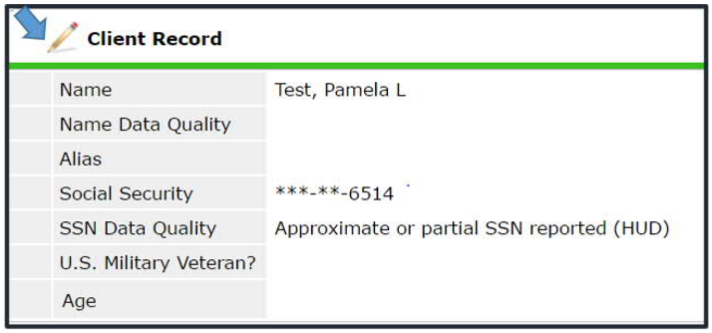
Head of HH	***Relationship to HoH***	***Joined HH***
Yes or No	if client is the Head of Household, the Relationship to HOH will be *Self*	if different than data entry date



WARNING: There must only be 1 Head of Household!

6. If you forget to add, or want to edit, the Name Data Quality, SSN Data Quality or Military Veteran questions, you can enter the data by following the steps below:

   a. Click on the Edit pencil next to the Client Record. Click on Save. (This information can be entered in real time or backdate mode.)
   IMPORTANT NOTE: You cannot enter the SSN after the initial entry—you must submit a helpdesk request to HAND via http://handetroit.org/helpdesk .



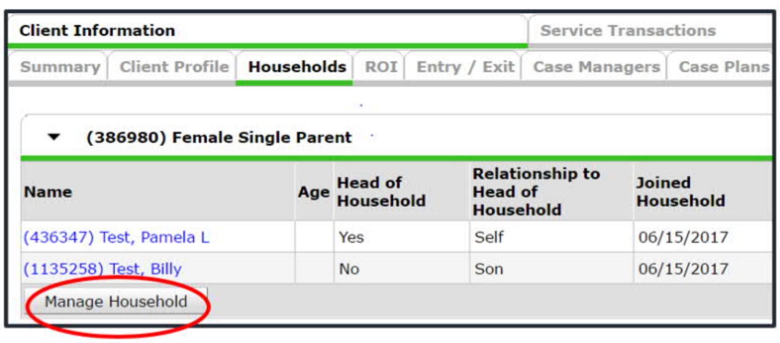
b. Click Save. If you need to edit this information for other HH members, on the left-hand side under Household Members, click on another HH member's name to switch to that client's record. The active client is highlighted in blue.

7. When finished, it is recommended to return to the Head of Household's client record. Click Save & Exit (this will close the HH window).

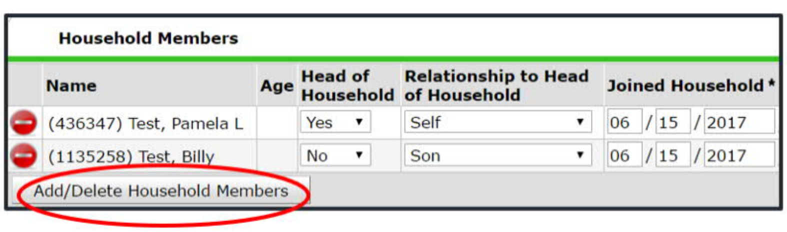
ADDING NEW CLIENTS TO AN EXISTING HOUSEHOLD

An existing household may have a new member, such as a newborn baby or a new significant other, etc. If this is the case, you will need to add the new member to the household. Back Date mode should be the date the new client came into the project (in the example of a baby, that would be their birthday)

1. Click on Manage Household.



2. Click Add/Delete Household Members.



3. Click arrow to expand ▶ Add Clients to the Household section.
   a. See Steps 4 and 5 in the Creating a New Household section for instructions on new HH members.
      - Update the *Joined HH* date

ADDING NEW CLIENTS TO AN EXISTING ROI

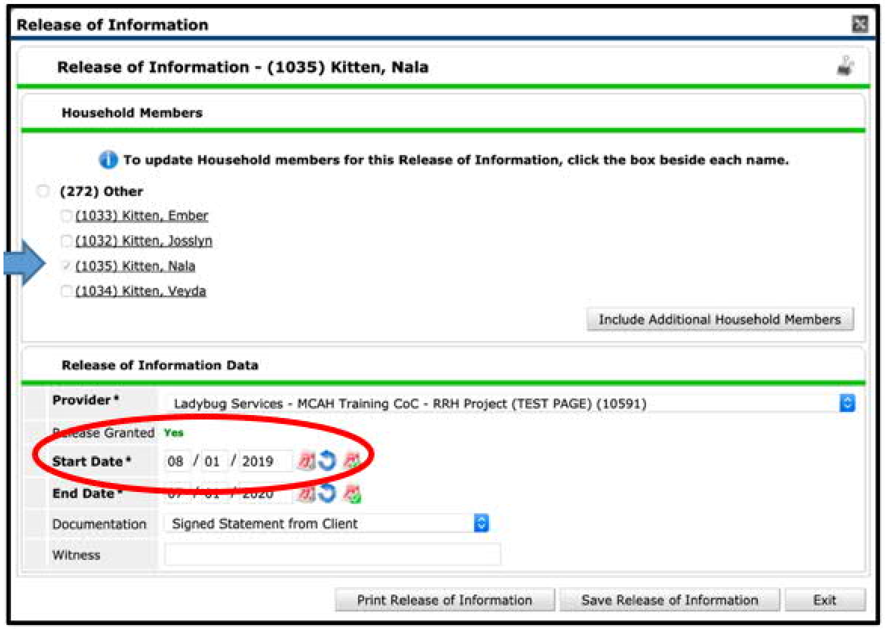
Once the new HH member has been entered into the Household, they will need to be added to the existing ROI.

1. While on the HoH record:
    a. Click on the ROI tab
    b. Click the Edit pencil
    c. Click the button 

    d. Check the box next to the new HH member's name

    e. Click Continue.
    f. Click Exit.
2. Switch to the new HH member record (located on the Client Profile screen).
    a. Click Submit

    b. Click the ROI tab.
    c. Click the Edit pencil.
    d. Deselect all other HH members. Only the new HH member's name should be selected.
    e. Change the ROI date.



f. Click Save Release of Information

g. Switch back to the HoH record & click Submit (located on the Client Profile screen).

ADDING NEW CLIENTS TO AN EXISTING ENTRY

Once the new HH member has been entered into the Household and the existing ROI, they will need to be added to the existing Project Entry.

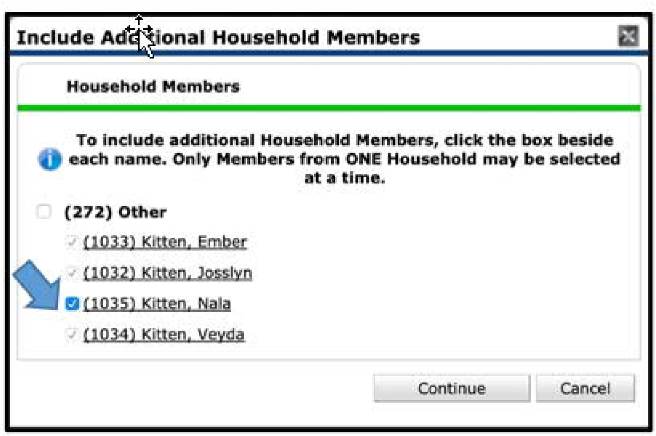
1. While on the HoH record,

   a. Click on the Entry/Exit tab

   b. Click the Edit pencil

   c. Click the button 

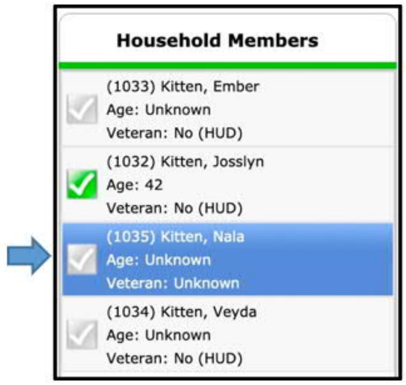
   d. Check the box next to the new HH member's name



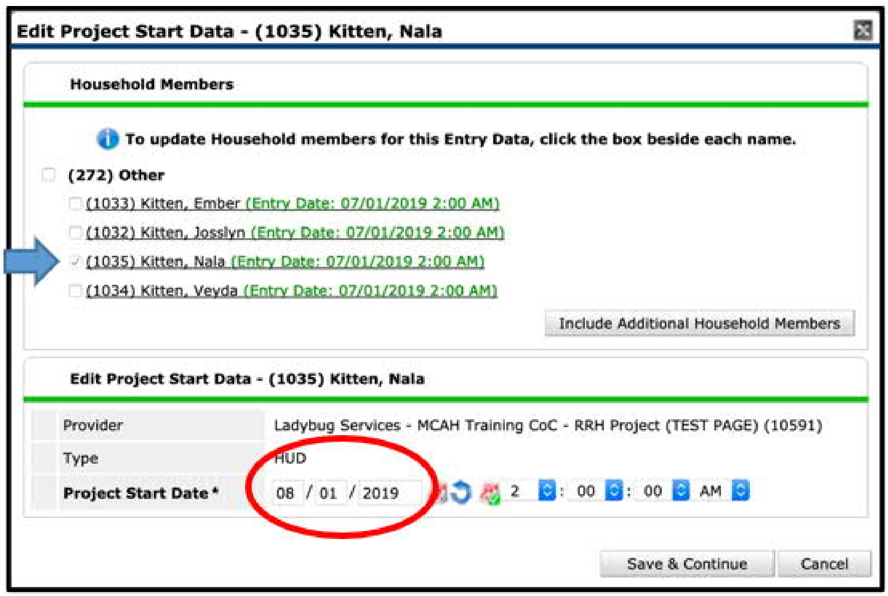
   e. Click Continue

   f. Click Save & Continue

2. On the left-hand side of the Entry screen, click the name of the new HH member's record to switch to their record



   a. Click the Edit pencil next to Entry date
   b. Deselect all other HH members. Only the new HH member's name should be selected.
   c. Change the Entry date

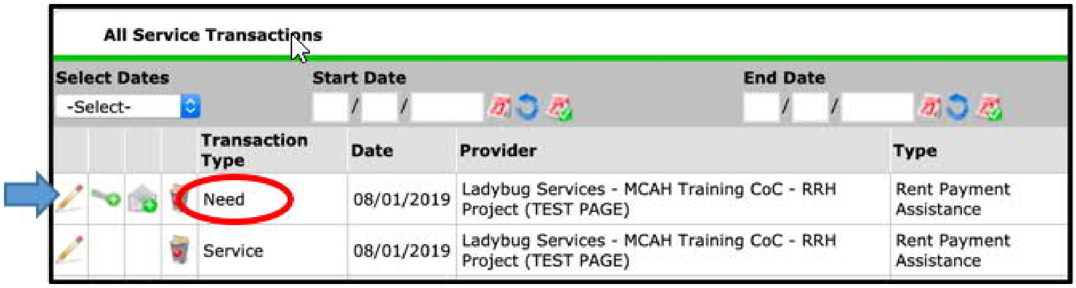


   d. Click Save & Continue
   e. Conduct data entry for this client according to grant specific workflows. Save when finished.
   f. On the left-hand side of the Entry Screen, switch to the HoH record.
   g. Click Save & Exit to close the window.

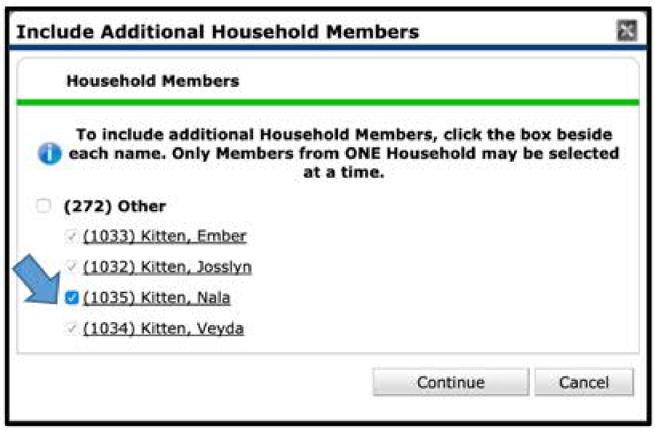
ADDING NEW CLIENTS TO EXISTING SERVICES

Now that the new HH member has been entered into the Household, the existing ROI, and the existing Project Entry, they may need to be added to the existing Needs and Service (where applicable). For example, if the service Rent Payment Assistance was provided in July and August, but the new member didn't enter the HH until August, they would not be included in the July service.

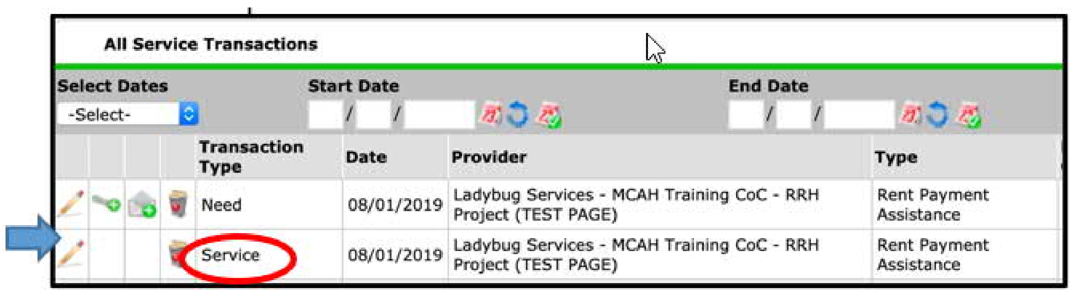
1. While on the HoH record:
    a. Click on the Services Transactions tab
    b. Click the Entire Service History Display tab
    c. Click the Edit pencil next to the Need



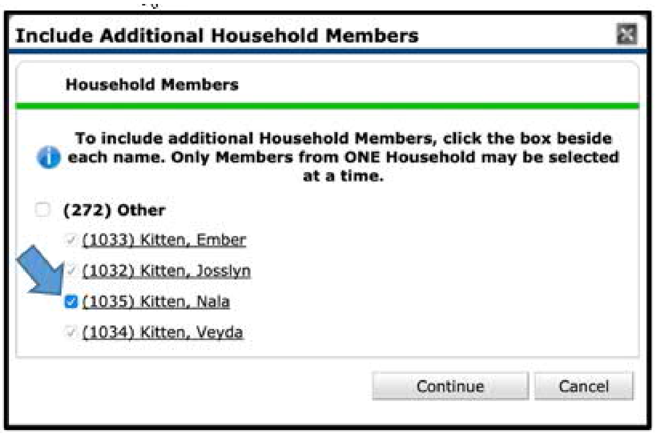
    d. Click the button Include Additional Household Members
    e. Check the box next to the new HH member’s name



    f. Click Continue
    g. Click Save & Exit. This will place you on the Needs tab within Service Transactions.
    h. Click the Entire Service History Display tab
    i. Click the Edit pencil next to the Service



    j. Click the button Include Additional Household Members
    k. Check the box next to the new HH member’s name



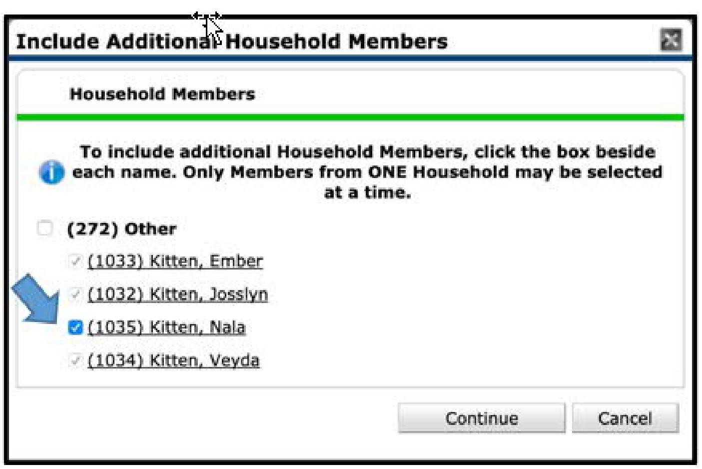
l. Click Continue
m. Click Save & Exit. This will place you on the Services tab within Service Transactions.

ADDING NEW CLIENTS TO EXISTING CASE PLANS

1. While on the HoH record, from the Client Information tab:
    a. Click on the Case Plans tab
    b. Locate the Goal in which the new client will be included
    c. Click the Edit pencil next to the Goal type

    d. Click the button 

    e. Check the box next to the new HH member's name



    f. Click Continue
    g. Click Save & Exit.

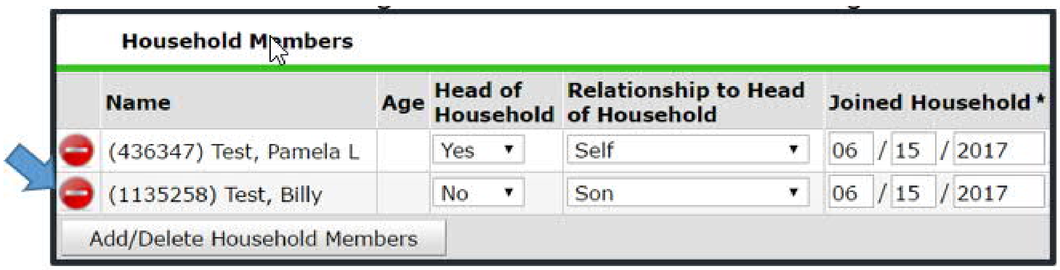
Removing or Deleting Clients from a Household

There may be times when a household member leaves the household, such as when a child who becomes an adult and moves out or a ‘significant other’ leaves the household. In these cases, you would need to either remove or delete the clients from the household.

IMPORTANT NOTE: Removing rather than deleting the household member is recommended; if a member is deleted, the client’s association with the household is also deleted completely and may impact reporting.

<u>Removing a Client</u>

1. To remove a client, click Manage Household.
2. Click the Red Minus sign next to the client who is leaving.



3. Enter the *Date Client Left Household.* Click Save.

   This client will now be located under the Previous Household Members section and can return (or be reactivated) to the HH if need be by clicking on the Reactivate button next to the client’s name.

   - If reactivated, complete questions from the pop-up window. Click Save.

4. Click Save & Exit to close HH window.

<u>Deleting a Client</u>

WARNING: This should be rare and should seldom occur. If there is a need to delete a client from a household, you will need to submit a ticket with your request and explanation to http://handetroit.org/helpdesk.

Other Important Information

- The Household History Report button will display activity for adding/ editing/ deleting HH members.
- Previous Associations will increase by 1 each time a client leaves a HH. Click the View icon to display activity.
- Household Count represents the number of households in which the client is currently associated. Click the View icon to display activity.

AT A GLANCE

To Create a New Household

1. Click the Household tab.
2. Click on Start New Household and complete Household Type.
3. Search for new Household members in ServicePoint; if not already in the system, click on Add New Client with this Information.
4. Complete Head of Household, Relationship to Head of Household and Date Joined the Household.

To Add New Clients to an Existing Household

1. Click Manage Household
2. Click Add/Delete Household Members
3. Follow steps 3 and 4 above to add new clients

To Add New Clients to an Existing ROI

1. Click on ROI tab
2. Click the Edit pencil
3. Click the button Include Additional Household Members and select the new HH member
4. Click Continue. Click Save & Exit.
5. Switch to the new client record (from the client profile screen)
6. Click on ROI tab
7. Click the Edit pencil
8. Deselect other HH members
9. Change the ROI date
10. Click Continue. Click Save & Exit.
11. Switch back to HoH record

To Add New Clients to an Existing Project Entry

1. Click on Entry/Exit tab
2. Click the Edit pencil next to the Entry date
3. Click the button Include Additional Household Members and select the new HH member
4. Click Continue. Click Save & Exit.
5. Switch to the new client record (from the entry screen)
6. Click the Edit pencil next to the Entry date
7. Change the Entry date
8. Click Save & Continue
9. Enter assessment data according to workflows
10. Click Save
11. Switch back to HoH record (from the entry screen)

To Add New Clients to an Existing Needs & Services

1. Click on Services Transaction tab
2. Click the Entire Service History Display
3. Click the Edit pencil next to <u>Need</u>
4. Click the button Include Additional Household Members and select the new HH member
5. Click Continue. Click Save & Exit.
6. Click the Entire Service History Display
7. Click the Edit pencil next to <u>Service</u>
8. Click the button Include Additional Household Members and select the new HH member
9. Click Continue. Click Save & Exit.

To Add New Clients to an Existing Case Plans

1. Click on Case Plans tab
2. Click the Edit pencil next to the Goal
3. Click the button Include Additional Household Members and select the new HH member
4. Click Continue. Click Save & Exit.

To Remove Clients from a Household

1. Click on Manage Household.
2. Click the Red Minus sign next to the client who is leaving.
3. Enter the *Date Client Left Household.* Click Save.