

Creating a Household

All clients should have a household, even if they are the only person in it. Start by opening your client's profile in ClientPoint, and scroll down to the Households dashlet on the Summary page. Click on "Start New Household."

Client - (26860) Bowman, Test A

(26860) Bowman, Test A
Release of Information: Ends 10/07/2020

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

Added to the system 07/12/2007 02:25 PM

Name	Bowman, Test A	Gender	Male
Date of Birth	01/01/1998 (Age 21)	Primary Race	Client refused (HUD)
Social Security	555-55-5555	Secondary Race	
		U.S. Military Veteran?	No (HUD)

Provider	Permission	Start Date	End Date
The Giving Closet	Yes	08/17/2016	08/17/2043
ASPIRE - HOME - COUNTY	Yes	11/06/2018	11/06/2022
SOAR Applicant Tracking Assessment	Yes	10/17/2019	10/17/2021
HSC CHC	Yes	10/07/2019	10/07/2021
HSC CHC	Yes	10/07/2019	10/07/2021
HSC - SHOP Diversion Assistance	Yes	09/23/2019	09/23/2021

Program	Type	Project Start Date	Exit Date
HSC YOW	HUD	10/17/2019	
SOAR Applicant Tracking Assessment	HUD	10/17/2019	10/17/2019
Council for the Homeless	HUD	10/17/2019	

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ID	Type	Head of Household	Relationship
Search Existing Households			
Start New Household			

Start Date	End Date	Provider
10/17/2019	10/17/2019	Council for the Homeless
10/17/2019	10/17/2019	Council for the Homeless

If you do not see the dashlet, you can also go to the Households tab (indicated in orange above) and click the "Start New Household" button there, as shown below. Let the HMIS team know if you want the dashlet added to your Client Summary page.

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This Client is not currently a member of any Households.

Previous Households

Search Existing Households | Start New Household | Exit

Please email hmisrequest@councilforthehomeless with any additional questions.

However you get there, you will see the Add New Household window. There are three parts to this window. Part A allows you to select the type of household you are creating, Part B allows you to search for additional household members, and Part C shows you the clients currently in the household. At first it will only show the client you used to pull up this window.

If they are the only person in the household, select Single Female/Single Male/Single Person as appropriate and click Continue at the bottom. For a single person household, that's it!

If there are more members in the household, we will search for them the same way we search for clients on the ClientPoint home page. You can also add clients from this page, if the household member is not yet in the system.

The screenshot shows the 'Add New Household' window. Section A is at the top with 'Household Type' set to '-Select-'. Section B is the 'Client Search' area with various filters like Name, Date of Birth, Social Security Number, etc. Section C is a table of 'Selected Clients' with one entry: ID 26860, Name Bowman, Test A, Social Security Number 555-55-5555, Date of Birth 01/01/1998, Alias exam, Gender Male, Banned 0, Household Count 0.

This is a detailed view of the 'Client Search' section. The search criteria are: Name First: Jill, Last: Bowman; Social Security Number: 123-45-6789; Date of Birth: 09/17/1999; Gender: Female. The 'Client Results' table below shows one result: ID 99374, Name Bowman, Jill L, Social Security Number 123-45-6789, Date of Birth 09/17/1999, Gender Female, Banned, Household Count 1.

When you search for a client, Section B will look like this. If the client you intend to add shows up in the search results, click the green circle with the plus sign to add them to the household. In this example, we do this to add Jill Bowman to the household.

If you search by name **and** social security number but your client does not appear in the results, complete all shown fields and click "Add New Client With This Information." This will create a new client with the provided information and automatically add them to the household you are creating.

The 'Selected Clients' table shows two entries: ID 99374 (Bowman, Jill L) and ID 26860 (Bowman, Test A). The 'Continue' button at the bottom is highlighted with a blue box.

When section C displays the correct list of clients, click Continue. You have created a household!