Households in ServicePoint

The Data Center at NCCEH

March 2016

North Carolina Coalition to End Homelessness
securing resources   encouraging public dialogue   advocating for public policy change

Contents

Things to keep in mind about households

- A household is a group of people who present for services together
- Creating a household only *allows* clients to be enrolled and receive services together
- Clients in a household are NOT automatically enrolled
- For reporting purposes, being in a household does NOT equal being in a family. HUD's definition of family is one person over 18 and one person under 18 enrolled in a project together.
- Clients should only be removed from a household in extreme cases, like death or divorce.

Creating a new household with a new client profile

1. Make your new client profile, click "Add New Client With This Information"
2. Click this:

3. Select your household type
4. Search for the next household member. If you find them, click the ⊕ to add them. If not, click "Add New Client With This Information" to create a new profile and add them to the household
5. Members of the household will appear at the bottom under "Selected Clients," like this:

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Household Count
⊖	104	Billy, Betty					0
	103	Billy, Bobby					0
⊖	105	Billy, Brandy					0
					Showing 1-3 of 3		

6. Repeat until your household is complete
7. Click continue
8. From the "Household Members" box, change "Head of Household" to yes for you head of household. Notice that "Relationship to Head of Household" automatically changes to "self."

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
⊖	(103) Billy, Bobby		Yes	Self	01/01/2016	0	1
⊖	(104) Billy, Betty		No	daughter	01/01/2016	0	1
⊖	(105) Billy, Brandy		No	daughter	01/01/2016	0	1

Add/Delete Household Members   Household History Report

9. For all other household members, select appropriate response for "Relationship to Head of Household" dropdown
10. Click save and exit

Creating a new household with an existing client profile

1. Go to your client's profile
2. Click the "Households" tab
3. Click "Start New household"
4. Select your household type
5. Search for the next household member. If you find them, click the ➕ to add them. If not, click "Add New Client With This Information" to create a new profile and add them to the household
6. Repeat until your household is complete
7. Click continue
8. From the "Household Members" box, change "Head of Household" to yes for you head of household. Notice that "Relationship to Head of Household" automatically changes to "self."

9. For all other household members, select appropriate response for "Relationship to Head of Household" dropdown
10. Click save and exit

Adding a new household member to an existing household

1. Go to your head of household's profile
2. Click the "Households" tab
3. Under your list of household members, click "Manage Household"
4. Under the "Household Members" box, click "Add/Delete Household Members"
5. Click the arrow to the left of "Add Clients to Household" to make the client search box appear

6. Search for the next household member. If you find them, click the ⊕ to add them. If not, click "Add New Client With This Information" to create a new profile and add them to the household
7. Repeat until your household is complete
8. Click continue
9. From the "Household Members" box, change "Head of Household" to yes for you head of household. Notice that "Relationship to Head of Household" automatically changes to "self."

Household Members

|	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *			Previous Associations	Household Count
⊖	(103) Billy, Bobby		Yes ⌄	Self ⌄	01 / 01 / 2016	🔖 🔖	0 🔍	1 🔍
⊖	(104) Billy, Betty		No ⌄	daughter ⌄	01 / 01 / 2016	🔖 🔖	0 🔍	1 🔍
⊖	(105) Billy, Brandy		No ⌄	daughter ⌄	01 / 01 / 2016	🔖 🔖	0 🔍	1 🔍

Add/Delete Household Members   Household History Report

10. For all other household members, select appropriate response for "Relationship to Head of Household" dropdown
11. Make sure the "Joined Household" date matches when the new member actually joined the household (birth date for a new baby, date married, etc)

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *			Previous Associations	Household Count
⊖	(103) Billy, Bobby		Yes ⌄	Self ⌄	01 / 01 / 2016	🔖 🔖	0 🔍	1 🔍
⊖	(104) Billy, Betty		No ⌄	daughter ⌄	01 / 01 / 2016	🔖 🔖	0 🔍	1 🔍
⊖	(105) Billy, Brandy		No ⌄	daughter ⌄	03 / 15 / 2016	🔖 🔖	0 🔍	1 🔍

Add/Delete Household Members   Household History Report

12. Click save and exit

Removing a household member from an existing household

Remember, clients should only be removed from a household in extreme cases, like death or divorce.

1. Go to your head of household's profile
2. Click the "Households" tab
3. Under your list of household members, click "Manage Household"
4. Click the ⊖ to the left of the household member you want to remove
5. Enter the date the client left the household and click save

ClientPoint Entries and Exits with households

Now that you have created your household, every time you enroll or exit (or provide a service) for your client you will see the "Household Members" section. It will list your household members, each with a check box by their name:

When entering or exiting a project or receiving services, the box should be checked for every applicable family member. Someone listed in a household, but not coming to stay in your shelter? Don't check that box! The client whose profile you are currently working in cannot be unchecked.

Adding a household member to an existing ClientPoint entry

1. Go to the profile of the head of household
2. Click the "Entry/Exit" tab
3. Click on the ✎ under Entry Date
4. In the "Household Members" section, click "Include Additional Household Members"
5. Check the box of the client joining the enrollment. Currently enrolled members will already be checked.

6. Don't change the date in the next box! This will change the enrollment date for the whole household! Click Save and continue.

7. In the "Household Members Associated with this Entry / Exit" box, click the ✎ beside the entry date of the newly included household member
8. Make sure that the newly included household member is the only box checked. Change the entry date to when this client entered:

9. Click save and continue
10. In the "Household Members Associated with this Entry / Exit" box, the entry date for that one client should be different than the rest of the household:

11. Proceed with the rest of the enrollment

Exiting a household member before the rest of the household

1. Go to the profile of the household member that is exiting
2. Click the "Entry/Exit" tab
3. Click on the ✎ under Exit Date

4. In the "Household Members" section, make sure that the client exiting is the only household member with a checked box
5. Exit the client normally. The rest of your household will still be enrolled in the project

ShelterPoint entries and exits with Households

Once your Household is set up, your clients will appear in the "Household Members" section of the check in process

1. Go to your bedlist, select the available bed you want to assign to your Head of Household. Search for your Head of household
2. During the check in process, look for the "Household Members" section. Check the boxes of all household members checking in.
3. To assign your other household members to a specific bed, click "Assign Unit." Select the bed from the drop down list and click select:

4. Continue with the rest of the check in

Adding a household member to an existing ShelterPoint entry

1. From your bedlist select your Head of household
2. Under the "Household Members" section, click "Check in additional family members"
3. Change the Date In to the date the new household member checked in, and make sure their box is checked under the "Household Members" section. Click save and exit.

Check In Additional Household Members

Unit Entry Data

Date In *	03 / 15 / 2016

Entry Data

Provider	(1755) Genesis Home - Durham County - Family Matters - HUD city ESG state ESG
Type	HUD

Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit.

(9) Single Parent

☐ (103) Billy, Bobby (This Client is already checked in)

☐ (104) Billy, Betty (This Client is already checked in)

☑ (105) Billy, Brandy

Save & Exit   Cancel

4. Click the "Assign Unit" button to place new client in a specific bed
5. Proceed with the rest of the check in process

Checking out a household member before the rest of the household

1. From your bedlist select the client that is checking out by clicking the [icon] by their name
2. Under the "Household Members" section, make sure only the client who is leaving had the box checked
3. Proceed with the rest of the check-out process

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