

## How to Create, Edit or Delete a Household

This document will assist you in managing households in ServicePoint. A household needs to be created when there are multiple individuals in the family which are receiving your services.

**⚠ Do not** create a household for a single individual or for family members who are not part of your program

### How to Create a Household

1. Open the clients profile
2. Click on the Household tab
3. Click Start New Household

**NOTE:** You can also add clients to an existing household by clicking Search Existing Households



The screenshot shows the 'Client Information' window with the 'Households' tab selected. A message states: 'This Client is not currently a member of any Households.' Below this is a section for 'Previous Households' with a right-pointing arrow. At the bottom, there are three buttons: 'Search Existing Households', 'Start New Household', and 'Exit'.

4. Fill in the details on the next window
  - a. Identify the Household Type
  - b. Add individuals to the household by:
    - i. Search to see if that client has an existing profile
    - ii. If they exist, they will appear in client results, to add them to the household, click the Green Plus icon next to their name
    - iii. If they do not exist, click Add New Client With This Information
5. Once all members of the household have been added, Click Continue

### Assigning Roles of the Household

1. Identify and designate who is the head of household – the primary client/contact of the family. Choose Yes on the Head of Household drop down.
2. Identify the other household members in relation to the Head of Household.

In the example below we have a Mom (who is the head of household), a Dad and 2 kids. Since the Mom is the head of household the Dad's status would be Husband and not Dad.

- ⚠ Make sure that their Joined Household date matches their Intake date or Entry into your program.

Household Members							
	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
	(312) Smith, Chris		No	Son	09 / 03 / 2014	0	1
	(227) Smith, Jane	24	Yes	Self	09 / 03 / 2014	0	2
	(26) Smith, Joe		No	Husband	09 / 03 / 2014	0	1
	(311) Smith, Mary		No	Daughter	09 / 03 / 2014	0	1

Add/Delete Household Members Household History Report

3. Scroll to the bottom and Click Save and Exit
4. If you needed to add a new client into the system (choosing option iii in step 4) go into each new client's profile and fill in their client details:
  - a. Client profile
  - b. Entry into program
  - c. ROI
  - d. Intake assessment

**Your household has now been created.**

### How to Remove a Member from a Household

1. Open the client's profile
2. Click the Households tab
3. Click Manage Household
4. Click the red minus icon next to the individual you would like to remove from the household.



















Household Members							
	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
	(227) Smith, Jane	24	Yes	Self	09 / 03 / 2014	0	2
	(312) Smith, Chris		No	Son	09 / 03 / 2014	0	1
	(26) Smith, Joe		No	Husband	09 / 03 / 2014	0	1
	(311) Smith, Mary		No	Daughter	09 / 03 / 2014	0	1

Add/Delete Household Members Household History Report

Previous Household Members

*This Household does not have any previous members.*

Once they are removed you can see that that clients historical history with the household will be save and put into Previous Household Members section. This section will allow you to see the movement of clients in households.

Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *		Previous Associations	Household Count
 (227) Smith, Jane	24	Yes ▼	Self ▼	09 / 03 / 2014	 	0 	2 
 (312) Smith, Chris		No ▼	Son ▼	09 / 03 / 2014	 	0 	1 
 (311) Smith, Mary		No ▼	Daughter ▼	09 / 03 / 2014	 	0 	1 
Add/Delete Household Members				Household History Report			
Previous Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Left Household	Previous Associations	Household Count
 (26) Smith, Joe		No	Husband	09/03/2014	09/03/2014	1 	0 

## How to delete a Household

Deleting a household is similar to deleting an individual.

1. Open the client's profile
2. Click the Households tab
3. Click Manage Household
4. Click the red minus icon next to **each individual** until there are no more remaining individuals in that household list.

Once the household disappears you can click on Previous Households to see the history of that household.