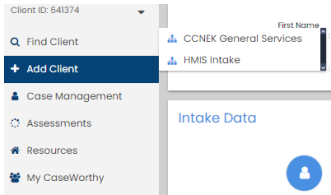
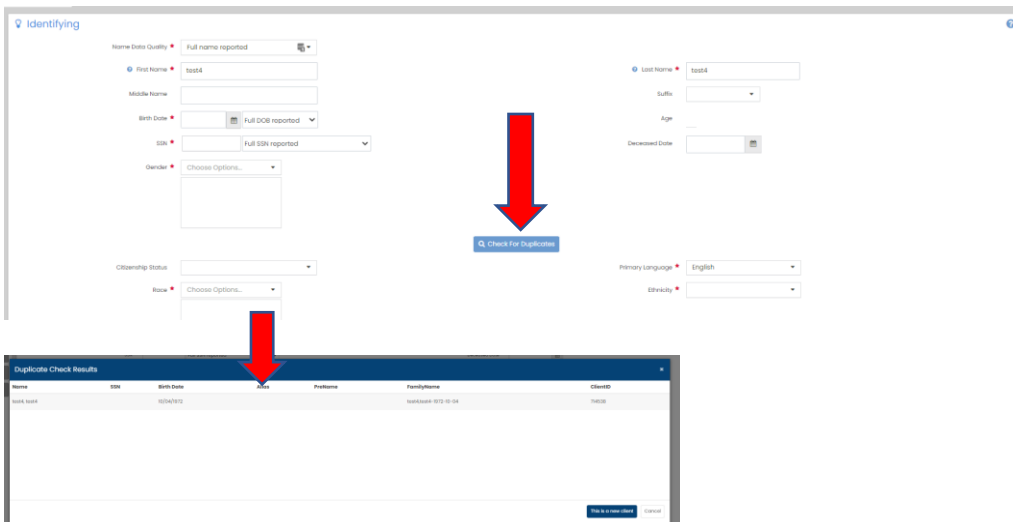


Adding the family member during the enrollment workflow:

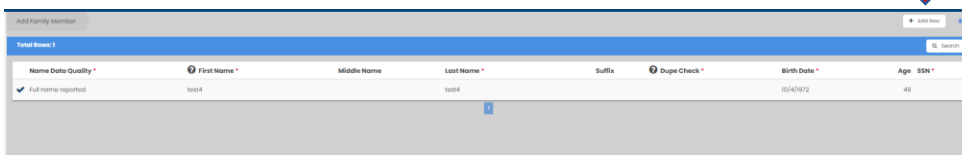
1. Add client and select HMIS Intake



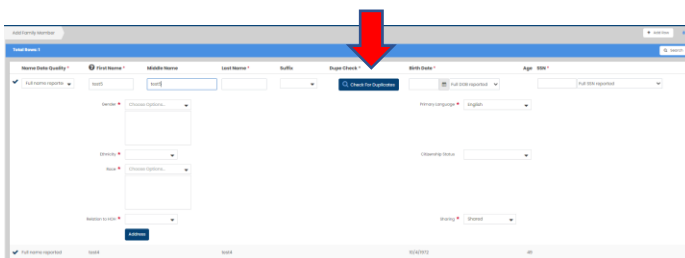
- 2. Enter the first and last name of the head of household and click check for duplicates
- 3. If the record is found then select that record – you should rarely need to use ‘this is a new client’



- 4. The Add Family Member screen will be next
- 5. Click 'Add Row', this will open the family member add screen



- 6. Enter the household members first and last name and click check for duplicates
- 7. If the client is found then select that record - you should rarely need to use ‘this is a new client’



8. Complete the form and if more members are needed the just click 'Add Row Again'
9. If you know you will be adding 3 members for example then at the start click 'Add Row' 3 times. This way the system will require you to complete all the forms before it will allow you to save.
10. This will help avoid situations where you reflexively click save after completing just one of the family member forms. If you have haven't 'added a row' for each member the system will move forward and you won't be able to go back to add the other members until after the workflow is complete.



11. Once you have added all the necessary members you will be brought to the program enrollment screen where you just need to identify the enrollment program and enrollment start date

12. The next screen is your opportunity to add all necessary members to the enrollment
13. Make sure to set their enrollment start dates b/c the system will default to today's date
14. If you are missing a member on this screen just keep moving forward as you will need to add them after your enrollment is complete using the manual add process.

Client	Provider *	Restriction *	Start Date *	End Date	Enrollment Relationship to HOH
test4, test4	Mid-America Regional Council	Shared	2/1/2022	Open	Self
test5, test5					

Enrollment Members

Filters

Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HOH.  
Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Restriction *	Start Date *	End Date *	Enrollment Relationship to HOH
test4, test4	Mid-America Regional Council	Shared	2/1/2022	Open	Self
test5, test5	Mid-America Regional Council	Shared	02/01/2022	12/31/9999	Child

Enrollment Begin Date: 02/01/2022      Enrollment End Date: 12/31/9999

13. Take note of the name info at the top of the assessment – when you have more than one person in the enrollment you will see the name of the client for whom you are adding data for on each assessment screen.

test4 test4 - HUD Universal Data

HUD Universal

Assessment: 2/1/2022 - ACH - ESG 9999 - At Entry

If client has changed residences since project entry, change the client location (CoC) through a new during program assessment.

Client Location:

Disabling Condition:

Continuum of Care Code:

Living Situation

Type of Residence: