

QRG – Add Member to HoH’s Enrollment

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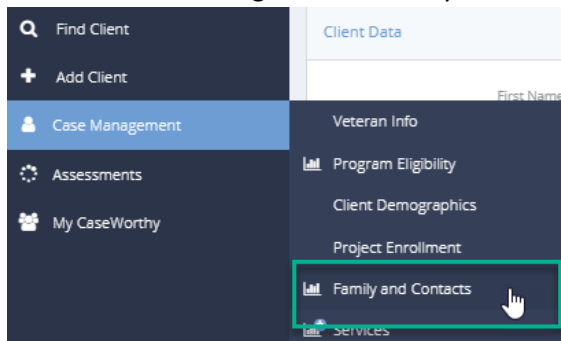
WHAT IS A QRG 1

WHO THIS GUIDE IS FOR 1

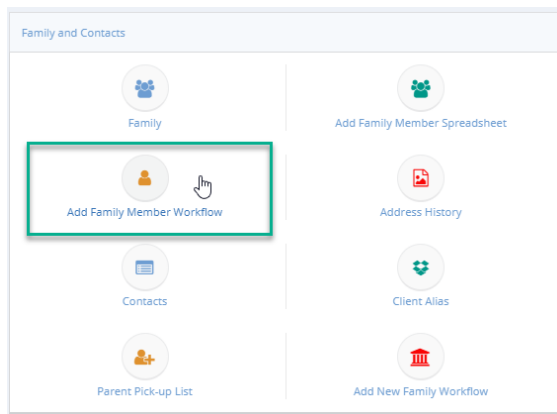
WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR – Family members that join the HoH’s enrollment at a later date.

STEP 1 – Case Management > Family and Contacts



STEP 2 – Add Family Member Workflow



STEP 3 – Look up existing HMIS client or

The screenshot shows the 'Add Existing Client as Family Member' form. On the left is a sidebar with 'Add Family Member and Enrollments New' and options like 'Add Family Member', 'New Member Demographics', 'Add Old Enrollment to New Member', and 'Add Old Enrollment to New Member'. The main form area has a title 'Add Existing Client as Family Member' and two required fields: 'Last Name' with a search icon and 'Relation to HOH' with a dropdown arrow.

STEP 4 – Add a new client (bottom right hand corner)

This image shows two buttons: a 'Save' button with a floppy disk icon and an 'Add New Client as Family Member' button with a plus sign icon.

STEP 5 – Select HoH's Enrollment and fill out required fields

The screenshot shows the 'Add Family Member to Open Enrollment' form. The sidebar includes 'Add Family Member and Enrollments New', 'Add Family Member to Open Enrollment', 'Assessment', and 'Question'. The main form area has fields for 'Enrollment' (dropdown), 'Entry Date' (calendar icon, showing 03/07/2019), 'Provider' (dropdown), 'Account' (text input), and 'Assign Case Manager' (checkbox). Below is a 'Restriction Information' section with a 'Restriction' dropdown set to 'Shared'.

STEP 6 – Complete workflow for new member enrollment

The image shows the 'HMIS Intake' sidebar menu with the following items: 'Add New Client', 'Add Family Member', 'Enrollment', 'Enrollment Members', 'Assessment', 'Suggested Reservation', 'Family Veterans', 'Service Spreadsheet', and 'Case Notes'.