

QRG – Add Member to HoH's Enrollment v2

Table of Contents

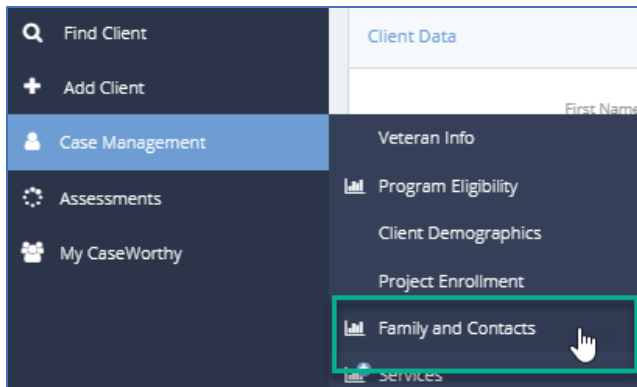
WHAT IS A QRG 1

WHO THIS GUIDE IS FOR 1

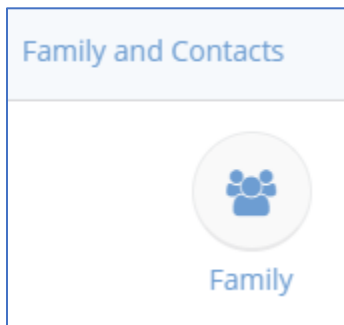
WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need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

WHO THIS GUIDE IS FOR – This guide is to enroll a family member that joins the HoH's enrollment at a later date.

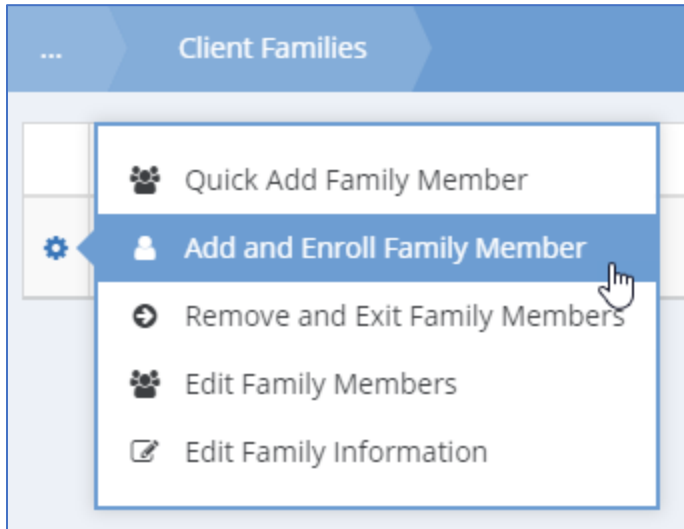
STEP 1 – Case Management > Family and Contacts



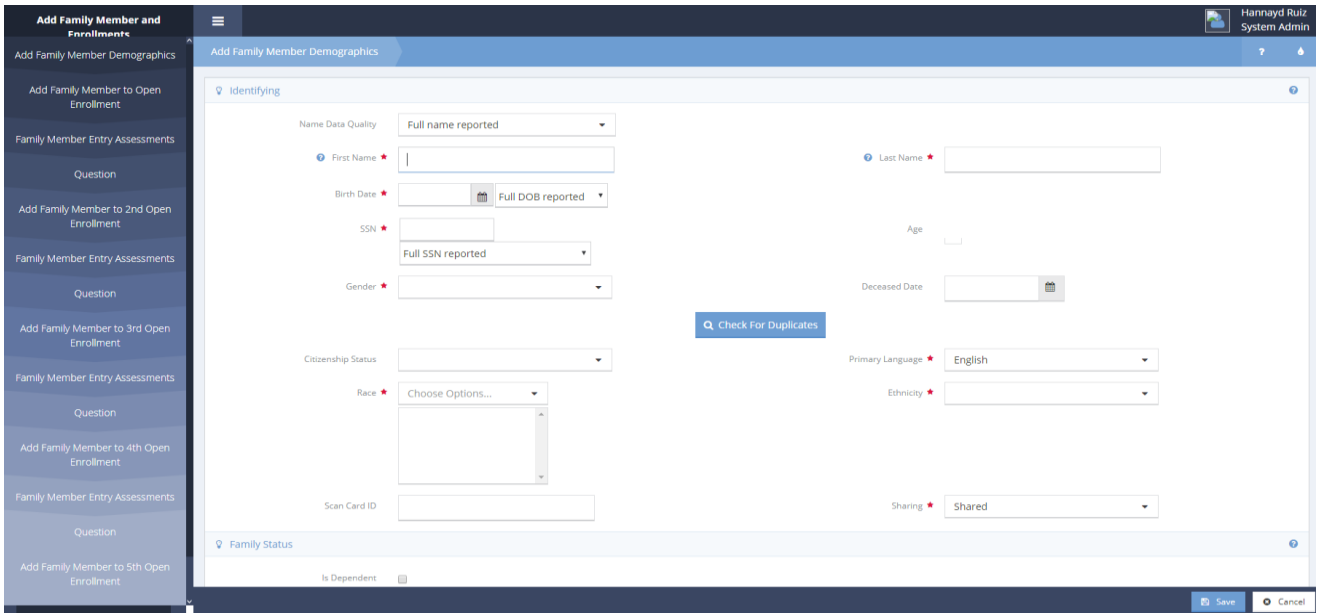
STEP 2 – Family Icon



STEP 3 – Gear > Add and Enroll Family Member



STEP 4 – Look up existing HMIS client or Add a new client



STEP 5 – Select HoH's enrollment and fill out fields

The screenshot shows the 'Add Family Member and Enrollment' interface. The main form includes the following fields and options:

- Enrollment:** A dropdown menu.
- Entry Date:** A date field with a calendar icon, currently set to 08/02/2019.
- Provider:** A dropdown menu.
- Account:** A text input field.
- Exit Date:** A dropdown menu with 'Open' selected.
- Enrollment Relation To HoH:** A dropdown menu.
- Schedule Follow Up:** A checkbox that is checked.
- Assign Case Manager:** A checkbox that is unchecked.
- Restriction Information:** A section containing a 'Restriction' dropdown menu set to 'Shared'.

At the bottom right of the form are 'Save' and 'Cancel' buttons. The top right corner shows the user 'Hannayd Ruiz System Admin'.

STEP 6 – Complete workflow for new member enrollment

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- HMIS Intake
 - Add New Client
 - Add Family Member
 - Enrollment
 - Enrollment Members
 - Assessment
 - Suggested Reservation
 - Family Veterans
 - Service Spreadsheet
 - Case Notes