

Adding New Household Members to Program Entries

There are many circumstances where household members are not included in the original program entry/exit. Children are born while families are in shelter, estranged family members rejoin the household when it becomes more stable, and various other things occur. Adding these additional household members to the ServicePoint entry record *the right way* is very important so that reports reflect the household together, rather than as separate individuals. There are slightly different steps that need to be taken to add household members to a standard entry/exit or a ShelterPoint check-in, as explained below.

Part 1 – Editing the Household (applicable to ShelterPoint and Entry/Exit)	1
Part 2 – For ShelterPoint Check-Ins	3
Part 2 – For Entry/Exits	6
Part 3 – Completing the Entry Assessment (for ShelterPoint and Entry/Exit)	8
How can I tell if I did it correctly?	9

Part 1 – Editing the Household (applicable to ShelterPoint and Entry/Exit)

To add an additional household member to a ShelterPoint check in, follow these steps first:

- 1) Look up the Head of Household.
- 2) Under “Households” on the Summary tab, or the Households tab, click the pencil next to the household type to edit the household.
- 3) Click the “Add/Delete Household Members” button.

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Prev Asso
(917) Rana-Salta, Deidre	33	No	-Select-	10 / 23 / 2013	0
(918) Rana-Salta, Regina	3	No	-Select-	10 / 23 / 2013	0

Add/Delete Household Members
Household

- 4) On the Add/Delete Household Members Click the triangular arrow next to “Add Clients to the Household”. This will expand the window so you can enter information about the new household member.

Add/Delete Household Members - (362) Female Single Parent

Household Members

Name	Age	Head of Household	Relationship to Head of Household
(917) Rana-Salta, Deidre	33	No	
(918) Rana-Salta, Regina	3	No	

Previous Household Members

This Household does not have any previous men

Add Clients to the Household

5) Enter the new household member's name, SSN, and SSN data quality. Then click "Search" to see if the person is already listed in ServicePoint.

6) If the person already exists in ServicePoint, you can add him/her to the household by clicking the green plus symbol next to his/her name.


7) If the person does not already exist in ServicePoint, click "Add New Client with this Information". A warning will pop up asking you to confirm that you looked through all the matches. Click "OK".

8) The new household member will then show up in the "Selected Clients" section of the window.

9) If there are additional household members to add, repeat steps 5-7 until everyone has been added. Once all additional household members have been added, click "Continue".

10) On the next screen, indicate the new household member's relationship to the head and the date they joined the household. When done, click "Save & Exit".






11) You will then be returned to the summary or household tab (depending on where you started) and you should see the new household member listed:

Households				
	ID	Type	Head of Household	Relationship
	362	Female Single Parent		
		*Rana-Salta, Deidre	Yes	Self
		Rana-Salta, Gabby	No	Daughter
		Rana-Salta, Regina	No	Daughter
Search Existing Households		Start New Household		

Part 2 – For ShelterPoint Check-Ins

If your program uses ShelterPoint, follow these steps to add the new household member to the check in. If your program uses standard Entry/Exits, skip to the next section.

- 1) Open ShelterPoint.
- 2) Click “Client Check-In”.
- 3) Locate the Head of Household on your bedlist and click on the Head of Household’s name.

Unit List - Robin's Nest Bedlist							
				Display	All Beds	Sort By	Floor
	Floor	Room	Bed	Hold	Client	Date of Birth	Gender
	Floor 1	Room 01	Bed 001		(917) Rana-Salta, Deidre	01/01/1980	Female
	Floor 1	Room 01	Bed 002		(918) Rana-Salta, Regina	01/01/2010	Female
	Floor 1	Room 01	Bed 003	Hold	EMPTY		
	Floor 1	Room 02	Bed 001	Hold	EMPTY		
	Floor 1	Room 02	Bed 002	Hold	EMPTY		

- 4) The “Unit Stay Entry Data” window will open. Scroll down about mid-way until you see the “Household Members” section of the window. (Note – if it is not expanded, click the triangular arrow next to the text “Household Members” to open it up). Click the “Check In Additional Family Members” button.

Household Members

Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.

(362) Female Single Parent

Member	Room	Bed	Action
<input checked="" type="checkbox"/> (917) Rana-Salta, Deidre	Room 01	Bed 001	Assign Unit
<input type="checkbox"/> (919) Rana-Salta, Gabby			Assign Unit
<input checked="" type="checkbox"/> (918) Rana-Salta, Regina	Room 01	Bed 002	Assign Unit

Enter Data

- 5) At the top of the Check in Additional Family Members screen, change the check in date and time to match the original check in date/time (note – you can see this by scrolling up).

>>>VERY IMPORTANT!!! YOU MUST CHANGE THE DATE/TIME TO THE ORIGINAL SHELTER CHECK IN or it will change the shelter check-in date for all family members!!!

Unit Entry Data - (917) Rana-Salta, Deidre

Date In * 09 / 01 / 2013 9 : 27 : 27 AM

Confirm for Next Day Stay? ☐

Unit Name / Number Floor 1 / Room 01 / Bed 001

Supplies Given

Locker number

Codes/Notes

Midnight Check In

Assign Unit

Incidents For (917) Rana-Salta, Deidre

Ban Start	Ban End	Incident	Site	Staff

Household Sharing

Add Household Data

Household Members

Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.

(362) Female Single Parent

Check In Additional Family Members

Unit Entry Data

Date In * 09 / 01 / 2013 9 : 27 : 27 AM

Entry Data

Assign Unit

Assign Unit

Assign Unit

- 6) Click “Assign Unit” to the right of the new family member’s name and select the appropriate bed/unit.

Check In Additional Household Members

Unit Entry Data

Date In * 09 / 01 / 2013 9 : 27 : 27 AM

Entry Data

Provider (4190) Robin's Nest Family Shelter

Type Basic

Household Members

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

(362) Female Single Parent

☐ (917) Rana-Salta, Deidre (This Client is already checked in) **Assign Unit**

☒ (919) Rana-Salta, Gabby Room 01 Bed 003 **Assign Unit**

☐ (918) Rana-Salta, Regina (This Client is already checked in) **Assign Unit**

Save & Exit **Cancel**

- 7) Check off the new family member’s name and then click “Save & Exit”.
- 8) You will then be returned to the “Unit Stay Entry Data” screen. Scroll to the bottom and click “Save & Exit”.
- 9) You will then be returned to the bedlist. You should now see the new household member listed with a room/bed assigned.
- 10) Click on the new family member’s name on the bedlist. This will bring up the “Unit Stay Entry Data” for the new family member.
- 11) At the top of the screen, you can now edit the check in date/time for the new household member and then:
- If your shelter has an Entry Assessment attached to its shelter check-ins (i.e. you can fill out information about date of birth, gender, etc), you can complete the information for the new family member on the check-in screen and then click “Save & Exit”, or

- b. If your shelter does not have an Entry Assessment attached to its shelter check-ins, click “Save & Exit” to update the client’s check-in date and time and then skip to Part 3 of this guide for instructions on completing the client profile.

Part 2 – For Entry/Exits

After editing the household as explained in part 1, follow these steps to add the family member to the Entry/Exit record.

- 1) Look up the Head of Household.
- 2) Under “Entry/Exit” on the Summary tab, or on the Entry/Exit tab, click the pencil next to the entry date to bring up the “Edit Entry Data” window.
- 3) Click the “Include Additional Household Members” button.

Edit Entry Data - (920) Flergherg, Matilda

Household Members

To update Household members for this Entry Data, click the box beside each name.

☐ **(363) Female Single Parent**

☒ (921) Flergherg, Jeremy (Entry Date: 07/12/2013 10:54 AM)

☒ (920) Flergherg, Matilda (Entry Date: 07/12/2013 10:54 AM)

Include Additional Household Members

- 4) On the “Include Additional Household Members” screen, check off the name(s) of the new household member(s).

Include Additional Household Members

Household Members

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

☐ **(363) Female Single Parent**

☒ (921) Flergherg, Jeremy

☒ (922) Flergherg, Amy

☒ (920) Flergherg, Matilda

Continue **Cancel**

- 5) Click “Continue”.

- 6) You will then be returned to the “Include Additional Household Members” window. The new household member will now be listed:

Edit Entry Data - (920) Flergherg, Matilda

Household Members

To update Household members for this Entry Data, click the box beside each name.

☐ (363) Female Single Parent

☒ (921) Flergherg, Jeremy (Entry Date: 07/12/2013 10:54 AM)

☒ (922) Flergherg, Amy

☒ (920) Flergherg, Matilda (Entry Date: 07/12/2013 10:54 AM)

Include Additional Household Members

Edit Entry Data - (920) Flergherg, Matilda

Provider	Robin's Nest Family Case Management (4191)
Type	Basic
Entry Date *	07 / 12 / 2013 10 : 54 : 39 AM

Save & Continue **Cancel**

- 7) Click “Save & Continue”.
- 8) The “Entry/Exit Data” window will then show up. At the top, you’ll see all the household members listed, all with the same entry/exit date.

Note -- If the additional household member was with the rest of the household at the time of entry (and just got forgotten/missed in your data entry), you can click on his/her name in the list of family members on the left side of the window, complete the client’s profile, and then click “Save & Exit” and you’re done! However, if this is not the case, continue with the remaining steps.

- 9) If the additional household member has a different date of entry than the rest of the household, click the pencil next to his/her entry date. This will open the “Edit Entry Data” window and you should see the new family member’s name at the top of the window:

Edit Entry Data - (922) Flergherg, Amy

Household Members

To update Household members for this Entry Data, click the box beside each name

☐ (363) Female Single Parent

- 10) Uncheck the original family members so only the new member/member(s) are checked off and then edit the entry date/time to reflect the date/time of the new family member's entry to the program:

- 11) Click "Save & Continue".

- 12) You will then be returned to the Entry/Exit Data window. If you look at the household information now, you should see the differing entry dates for the member(s) of the household:

Household Members Associated with this Entry / Exit						
		Name	Head of Household		Entry Date	Exit Date
		(921) Flergherg, Jeremy	Yes		07/12/2013	
		(922) Flergherg, Amy	No		09/15/2013	
		(920) Flergherg, Matilda	No		07/12/2013	

Part 3 – Completing the Entry Assessment (for ShelterPoint and Entry/Exit)

- 1) If the Entry/Exit Data window is already open, skip to step 2. If the Entry/Exit Data window is not already open, click the pencil next to the entry date from the Summary tab or Entry/Exit tab. The Edit Entry Data window will open. Click "Save & Continue". This will open the Entry/Exit Data window.
- 2) On the left side of the window, under the text "Entry Assessment", you will see a list of Household Members.

3) If the information at entry (such as prior residence, zip code, etc) for the new household member is the same as it was for the Head of Household:

a. Click on the Head of Household's name and then click the "Add Household Data" button.

Household Data Sharing

Client: (920) Flergherg, Matilda

Add Household Data

b. Check off the new family member(s) and then scroll to the bottom and click "Save & Exit".

Household Data Sharing

Household Members

To include Household members for this Household Assessment, click the box below. SAME Household may be selected.

☒ (363) Female Single Parent

☒ (921) Flergherg, Jeremy

☒ (922) Flergherg, Amy

☒ (920) Flergherg, Matilda

Household Data Sharing

A HOUSEHOLD MUST BE CREATED PRIOR TO USING THIS

Housing Status: [Literally Homeless (HUD)]

Residence Prior to Program Entry: [Emergency shelter, including hotel or motel paid for with e]

Length of Stay in Previous Place: [One to three months (HUD)]

Zip Code of Last Permanent Address: [97] G

Zip data quality: [Full or Partial Zip Code Reported (HUD)] G

Is Client Homeless?: [Yes] G

Is Client Chronically Homeless?: [Yes] G

c. This will copy the information for items that generally tend to be the same for the entire household to all household members.

4) Click the name of the new household member and then wait for the assessment to load.

5) Complete the entry assessment for the new household member. When done, click "Save & Exit". And you're done!







How can I tell if I did it correctly?

The quick and easy way to determine if you correctly added the new household member is to go to the Entry/Exit tab. Look at the "Client Count" column. If it says "1", that means the entry was completed for the person as a single individual and they will not be counted as part of a household:

Entry / Exit									
	Program	Type		Entry Date		Exit Date	Interims	Follow Ups	Client Count
	Robin's Nest Family Case Management (4191)	Basic		09/15/2013					1

This “bad” entry record must be deleted or the person will show up as a single individual in your reports. Delete it by clicking the garbage can to the left of the entry record. Then, follow the steps in this guide to create the entry, correctly attaching the person to their household.

A correct entry where there is more than one person in the household should look like this:

Entry / Exit									
	Program	Type		Entry Date		Exit Date	Interims	Follow Ups	Client Count
	Robin's Nest Family Case Management (4191)	Basic		07/12/2013					

The “Client Count” column should reflect the number of people in the household.