MN HMIS HOUSEHOLDS HOW-TO GUIDE

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Last Updated on 1/22/2019

Institute for Community Alliances

HOUSEHOLDS 101

WHAT IS THE FUNCTION OF HOUSEHOLDS IN HMIS?

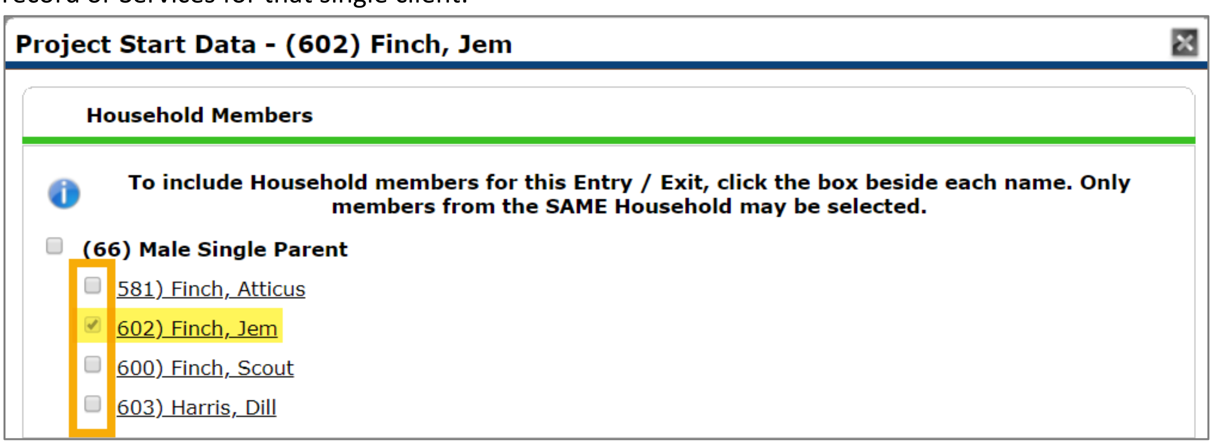
- The Households function in HMIS allows the user to create a household when a group of persons (2 or more) present together as a household or family unit, and are being provided services together.
- This will give the user the ability to create an Entry/Exit record that includes all the members of a household, and to assign Service Transactions to all members of a household as well.
- Households are created with one person designated as the Head of Household, and when other members are added, they are identified by their relationship to the Head of Household.

THE HOUSEHOLDS TAB

- The Households Tab is where the user will connect client records together so that they can be connected in provider entries on the Entry/Exit tab, or within Service Transactions.
- Note that clients connected together on the Households Tab will not automatically populate as connected on your funder reports. A household must have either an Entry/Exit record, a Service Transaction, or a Shelter Stay together in order to pull as a household on your report.

SINGLE CLIENTS

- Households are not created for single clients. If a single client is entering your program, you do **not** need to create a household!
- If a client who was previously part of household returns to the system as a single client, do nothing on the Household tab. You would simply **not** include the other household members in the Entry/Exit record or Services for that single client:



SHOULD I DELETE OR REMOVE A CLIENT FROM A HOUSEHOLD?

No! NEVER delete or remove a client from a household on the Households Tab!

- Deleting a household member deletes previous associations and will likely cause errors on your reports and is very difficult to correct after the fact.
- The only acceptable reason to delete household members is when a data entry mistake was made, and the client(s) should not be included in the household at all. Be sure to correct the mistake as quickly as possible. When in doubt, contact our Helpdesk for guidance!

ABOUT HEADS OF HOUSEHOLDS

- The term “Head of Household” does not necessarily mean “leader” of the house. It is simply a way to more easily organize family units in ServicePoint. The Head of Household is essentially the primary client of the household, or the eligible individual who is most likely to remain enrolled in program and be your main point of contact.
- Note that there cannot be more than one Head of Household per Entry/Exit enrollment.

CREATING AND ENROLLING A NEW HOUSEHOLD

WHEN YOU SHOULD (AND SHOULD NOT) CREATE A NEW HOUSEHOLD

There are potentially many scenarios that will arise as you create and edit households in your program. Listed below are some of the most common scenarios that come up, however be sure to email the MN HMIS Helpdesk if you are unsure or in need of support.

YES

Yes – Create a New Household:

- If you receive a Coordinated Entry referral for a family vacancy at your program, and are only referred the Head of Household from the Priority List, you may need to create the rest of the household at intake. (Depends on your CoC's procedures.)
- Create a new household if the Head of Household or Household Type changes **in-between** project enrollments.
- If the Head of Household changes during enrollment, you will want email the Helpdesk for guidance, as this is a complex process which will likely involve creating a new household. *see the section on this topic below on page 11.

NO

No – Do Not Create a New Household:

- If there is a household that matches the current configuration of the household presenting for services already created in HMIS, use that existing household.
- If the Household Type changes but the Head of Household stays the same, add the new client(s) to the current household and change the type in the Household tab accordingly.
- If the Household Type changes in a household that is **currently being served** by your project, do not create a new household.

MULTIPLE HOUSEHOLDS

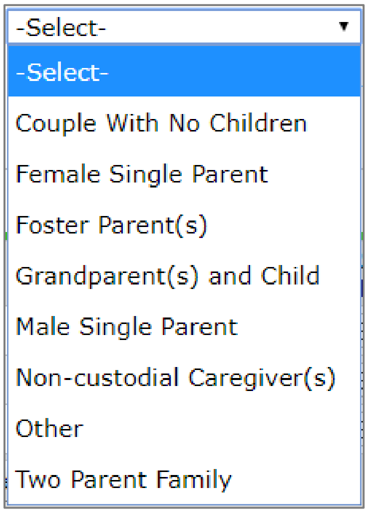
Some clients will inevitably end up in multiple households. Just be certain that you are enrolling the **correct** household for your client(s), to ensure that your funder reports are not adversely affected.

To confirm that you have the correct household:

- Locate the previous household that has the same Head of Household.
- Of those, is there a household setup that matches the current clients and/or Household Type presenting for services? If not, which household most closely aligns with the current household?

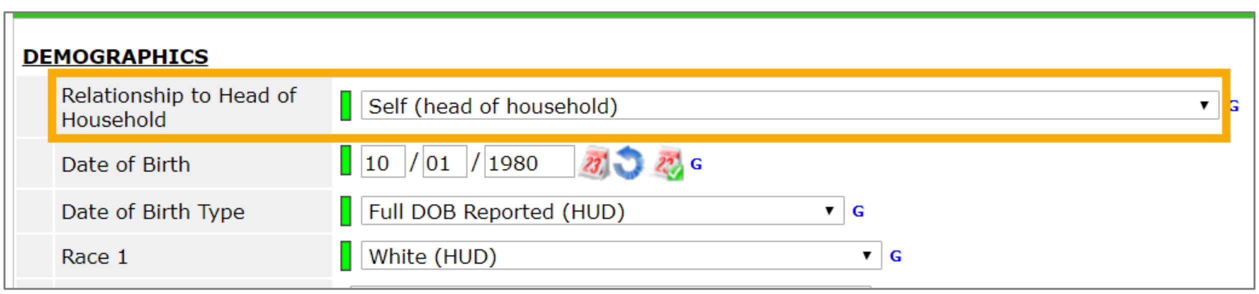
HOUSHEHOLD TYPE & RELATIONSHIP TO HEAD OF HOUSEHOLD

HMIS designates the following categories as Household Types that you can select for a household:



Each member who is part of a household is also identified by their **Relationship to the Head of Household**. This relationship is designated in two different places in a client record:

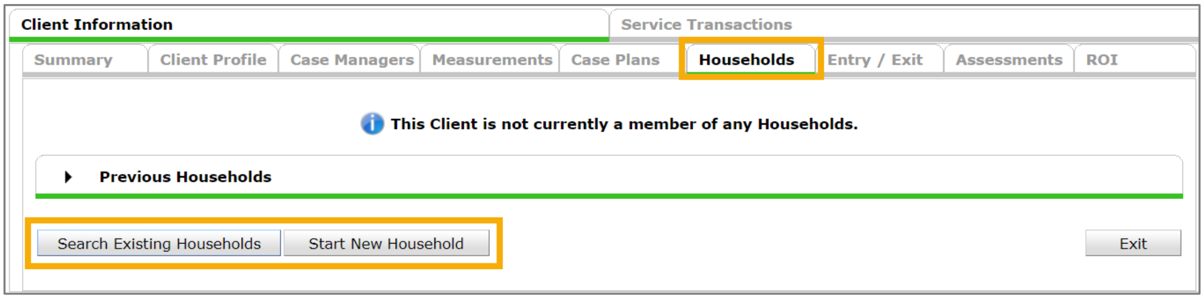
1. On the Households tab, in the Manage Households pop-up. This is a system designation for Relationship to Head of Household.
2. On the all-Inclusive assessments completed for a client at entry. This is a HUD required data element for Relationship to Head of Household:



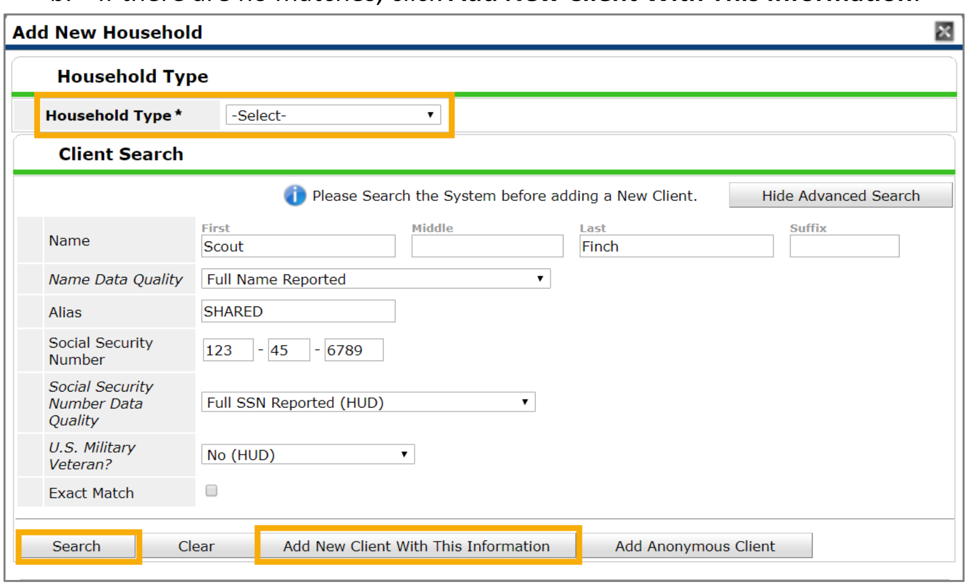
HOW TO CREATE A NEW HOUSEHOLD

1. Enter **EDA** (Enter Data As) mode, and **Back Date** to the date you first started working with the household.
2. **Search** for the client who will be the Head of Household on the Client Search screen to either identify an existing client or to add a NEW client to the system.
3. While in the **Head of Household's record**, navigate to the **Households Tab**.

4. Click on Search Existing Households first, and if you don't find an existing household, click on **Start New Household**.

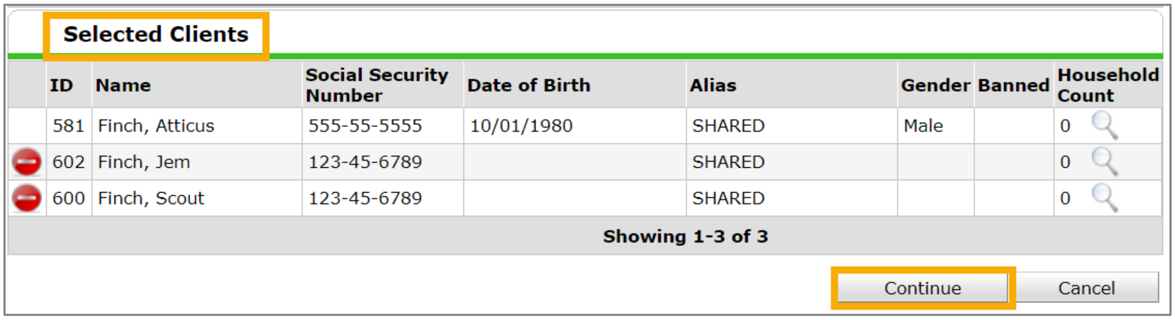


5. On the **Add a New Household** pop-up, select the correct **Household Type** from the drop-down menu.
6. Fill out the name of a household member that you would like to add to the household.
    a. Click **Search** to determine if the household member has previously been entered into the system. (Note that "Add New Client with This Information" is grayed out, as the system requires that you must search at least once for a client to ensure a duplicate client is not created in the system.)
7. After the Search button has been clicked, the results will show in Client Results.
    a. If you find an existing shared record for the client, use that!
    b. If there are no matches, click **Add New Client With This Information**:

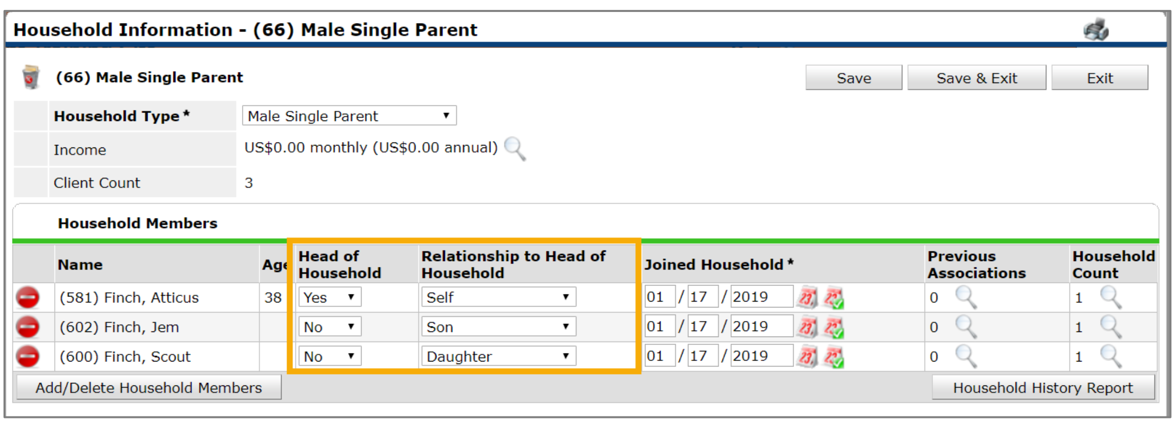


8. A pop-up box will appear as a flag to verify a **New Client** is being added to the system. Click **Ok**.

9. The new household member's name will then appear in the Selected Clients section below.
    a. If there are additional household members to add to the household, repeat the steps above to keep adding more household members until finished.
    b. Click **Continue** once all household members have been added.

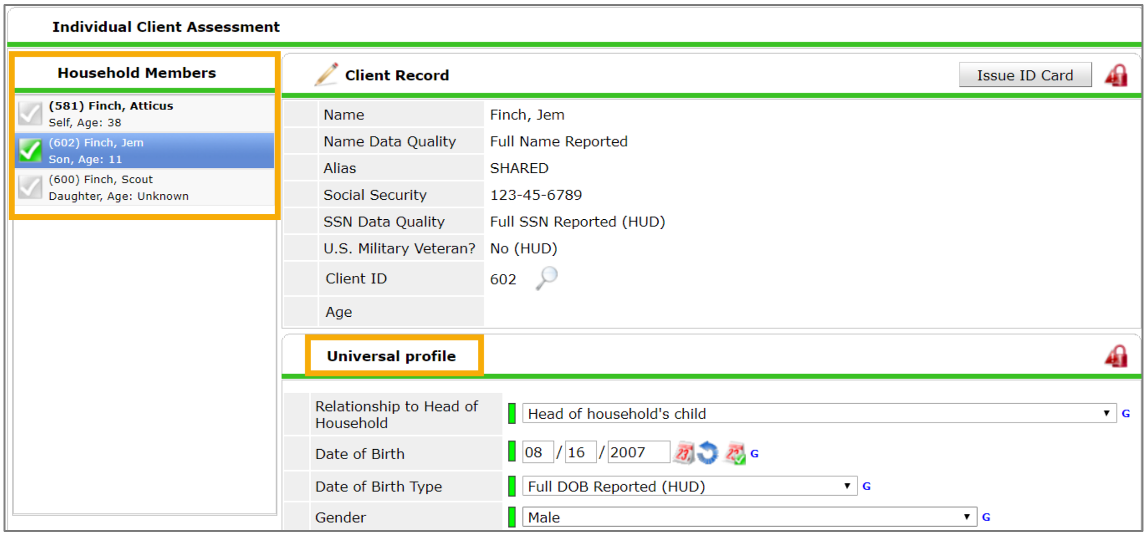


10. The **Household Information** pop-up allows you to create the household associations and to complete required data elements for **all** household members in one location.
    a. Under the **Head of Household column**, select **Yes** for the Head of Household and **No** for all other household members.
    b. Fill out the **Relationship to Head of Household** column for all members as well.
        i. The Relationship to Head of Household field should always be marked as "Self" for the client who is the Head of Household.

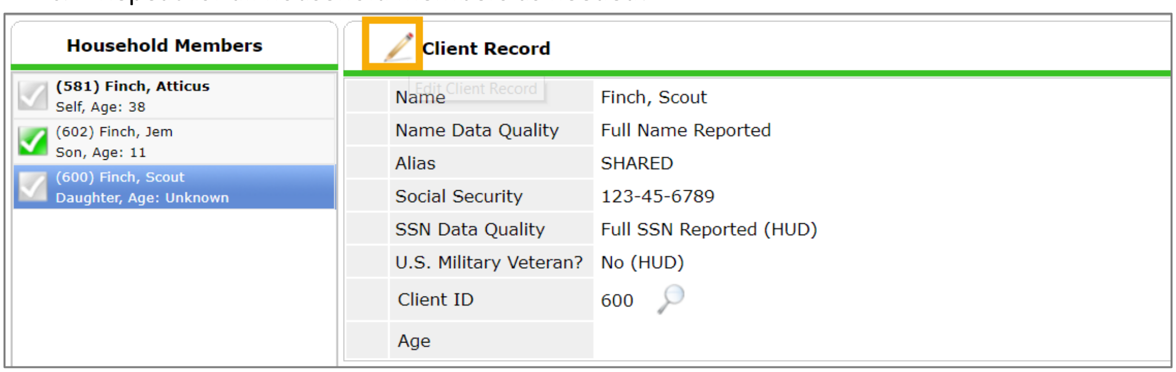


11. Scroll down to the **Universal Profile** assessment (attached to the Household Information Tab), and confirm all information is entered completely for the Head of Household.

12. On the left side of the screen, toggle to the additional household member names and **complete** the **Universal Profile** assessments by answering all questions for each household member.



13. Update each household member's **Client Record** questions if necessary.
    a. On the Client Profile Tab, click on the **edit pencil** to the left of **Client Record.**
    b. Update the data elements, as needed.
    c. Repeat for all household members as needed!

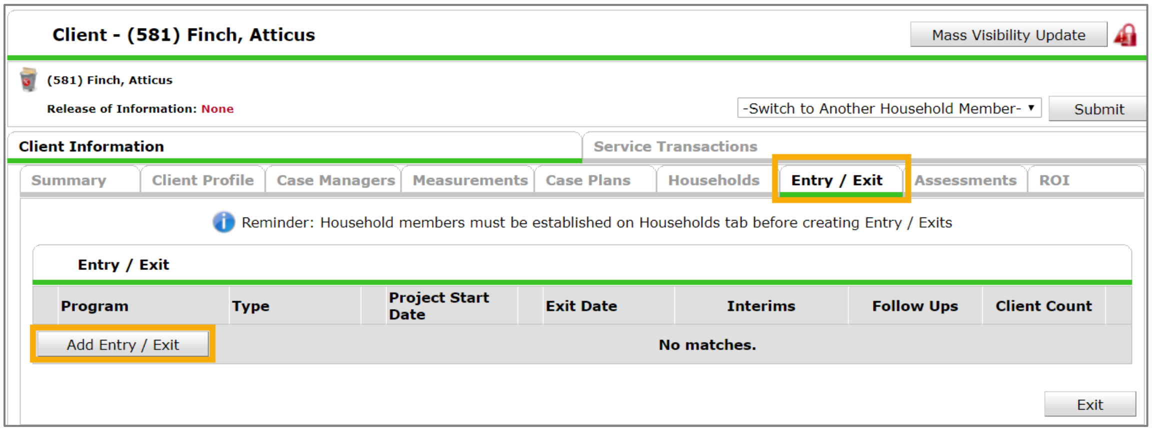


14. Click **Save & Exit** when completed.

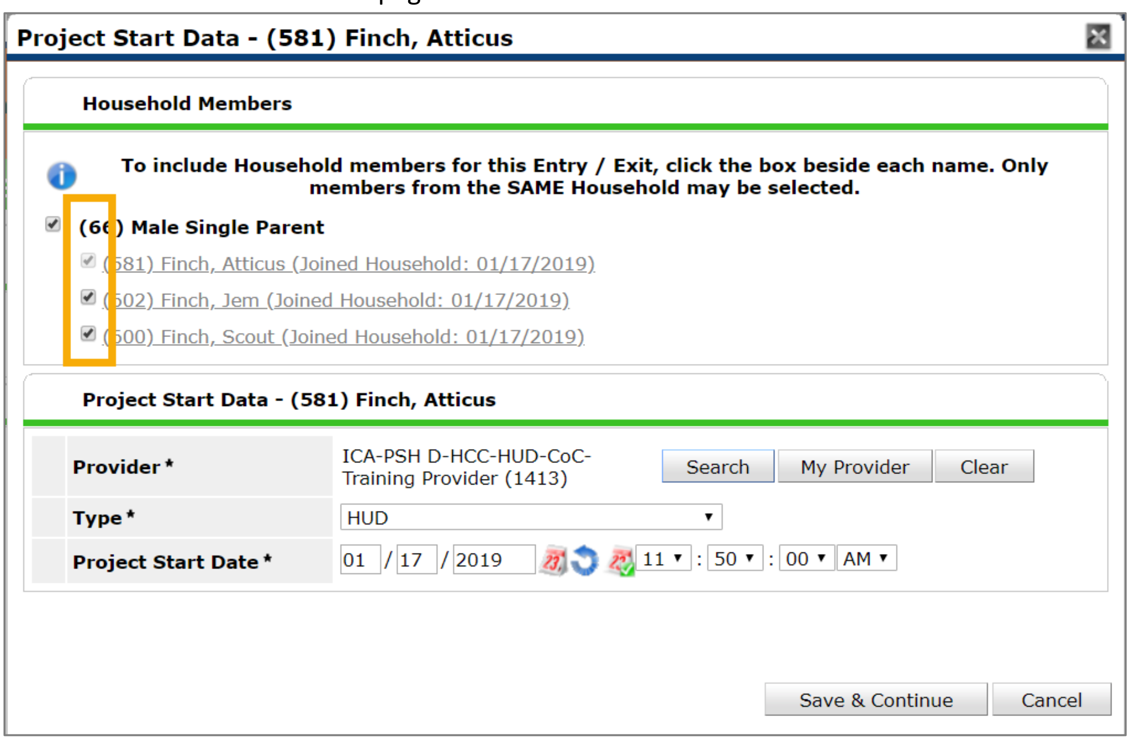
ENROLLING THE NEW HOUSEHOLD IN YOUR PROJECT

1. Make sure that you are still in the Head of Household's record from the previous steps above.
2. While in the **Head of Household's record**, navigate to the **Entry/Exit Tab**

3. While in the Entry/Exit Tab, click the **Add Entry/Exit** button:

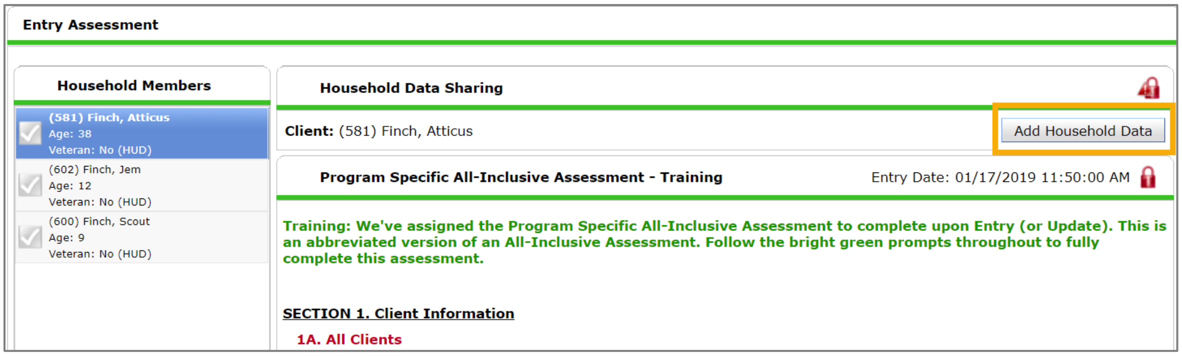


4. In the **Project Start Data** pop-up, make sure the check-boxes next to each household member who is entering the project are **checked**.
    a. The **Provider** field should match the provider to which you are in EDA mode. If not, back out and re-EDA!
    b. The entry **Type** is program-specific, so please refer to your funder User Guide on the "Forms & Instructions" page of the MN HMIS website to confirm what to select.

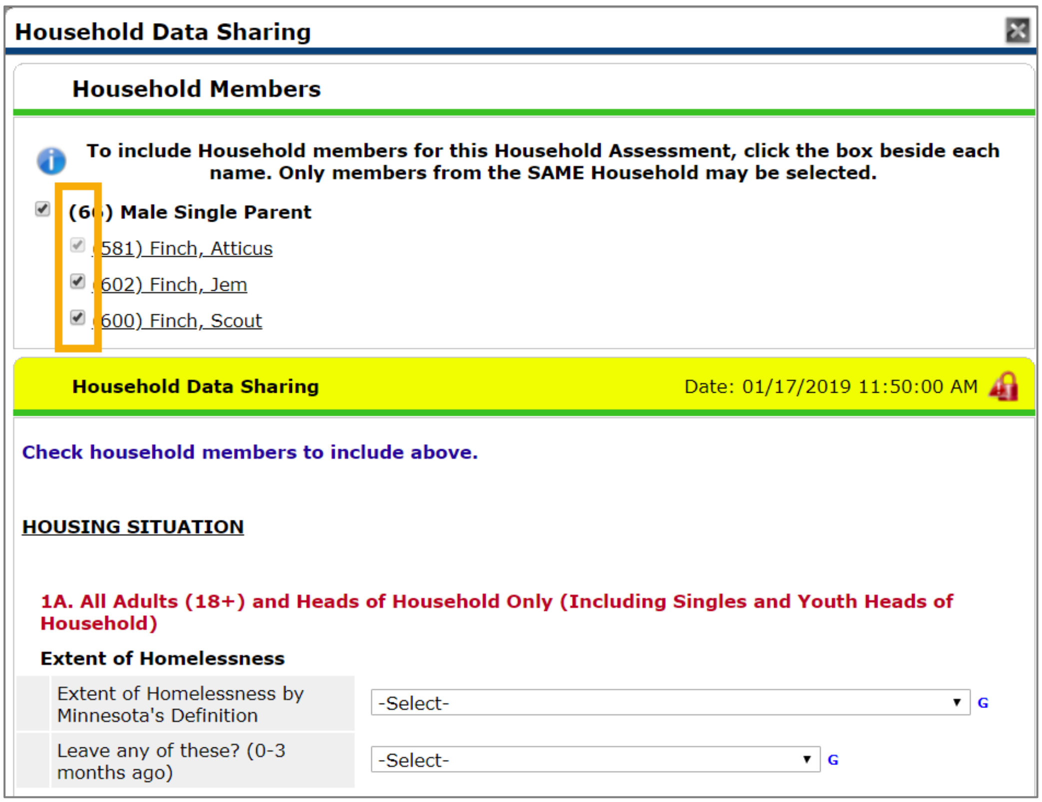


5. Click **Save & Continue** on the pop-up.

6. Next, select the Head of Household's record on the left-hand side of the screen, and then click on the **Add Household Data** button:

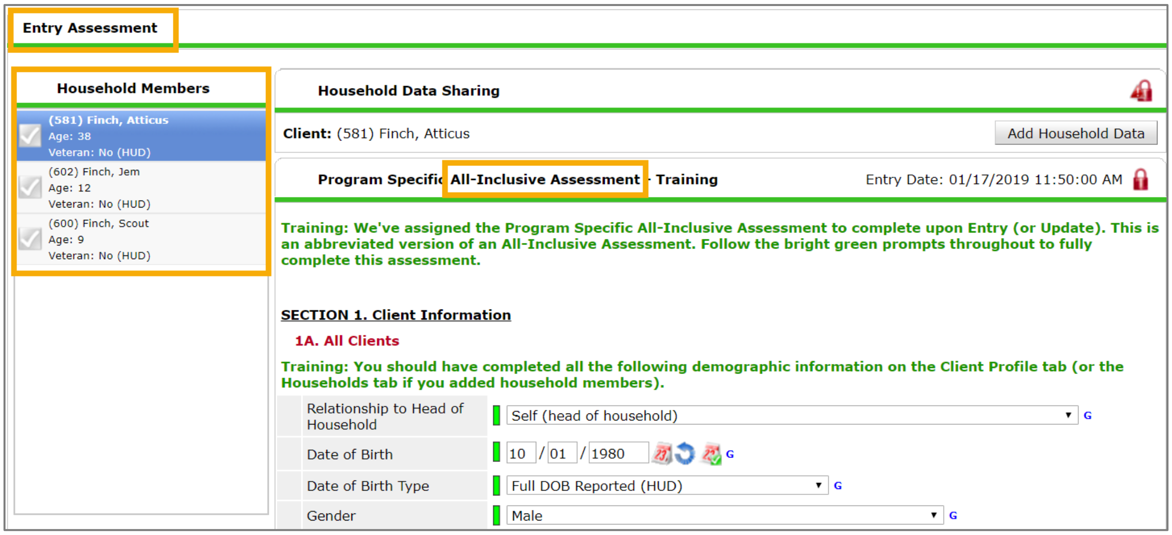


7. On the **Household Data Sharing** pop-up, check the boxes next to each household member and complete these data elements that are typically shared among all household members. The responses will then auto-populate for all household members who are entering you project.



   a. Note the red and/or green text at the beginning of each section in the **Household Data Sharing** pop-up to know for which household members those data elements are to be collected!

8. Next, use the toggle function on the left-hand side to complete the program **Entry Assessment** for **EACH** member of the household, even if they are a child.



9. Be sure to click **Save** when you are finished completing each household member's entry assessment.

IF THE HEAD OF HOUSEHOLD CHANGES DURING AN ENROLLMENT

When a Head of Household leaves and is officially exiting your program, but the rest of the household members will be continuing their enrollment in the program:

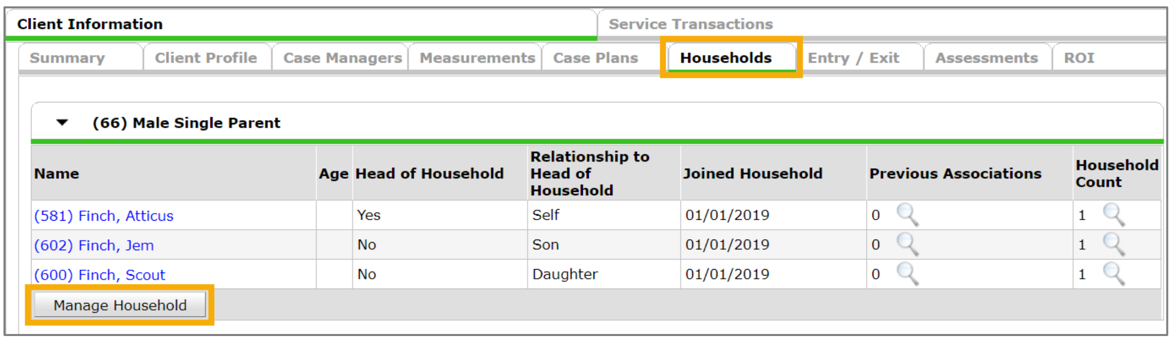
1. We recommend that you **contact the Helpdesk** in this situation, as a Head of Household change generally warrants creating a new Household, and the process can be complex.
2. Helpdesk will likely recommend that the user exit ALL household members on the date that the Head of Household left, and then create a new Entry/Exit with the new Head of Household and members who will be staying.

ADDING NEW MEMBERS TO A HOUSEHOLD DURING A PROJECT STAY

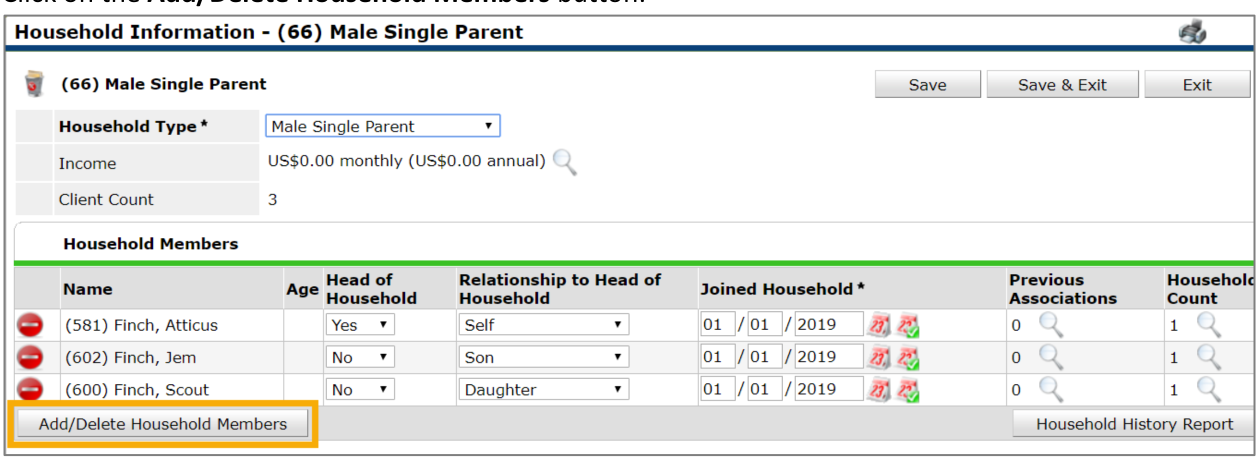
Families are complex and households are ever-changing. During a household's time in a housing program, you will often be required to make changes to its compostition in HMIS.

ADDING A NEW MEMBER TO AN EXISTING HOUSEHOLD STAYING IN YOUR PROGRAM

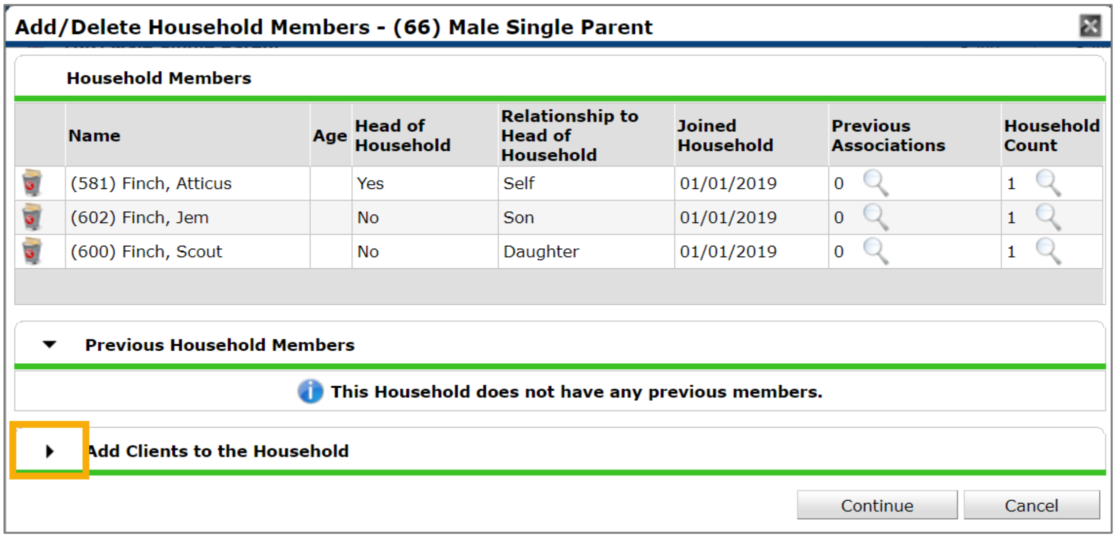
1. Enter **EDA** mode to the provider into which the new household member is entering.
2. Search for and open the **Head of Household**'s record.
3. **Back Date** to the date the NEW household member is joining.
4. In the Head of Household's record, navigate to the **Households Tab**.
5. Click on the **Manage Household** button to edit the existing household:



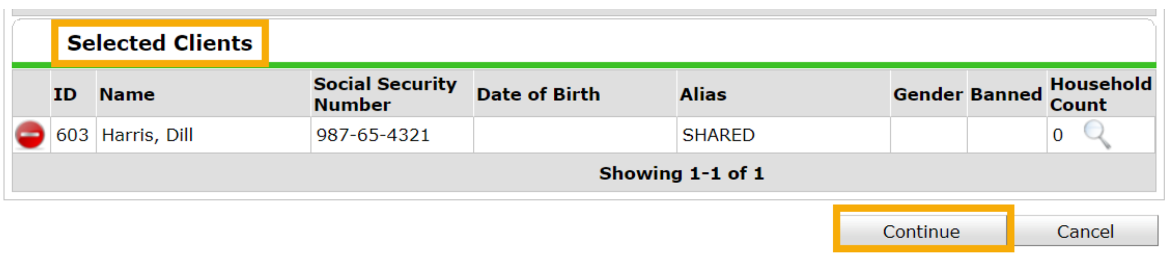
6. Update the **Household Type**, if appropriate.
7. Click on the **Add/Delete Household Members** button:



8. In the Add/Delete Household Members pop-up, click the arrow next to the **Add Clients to the Household section**:

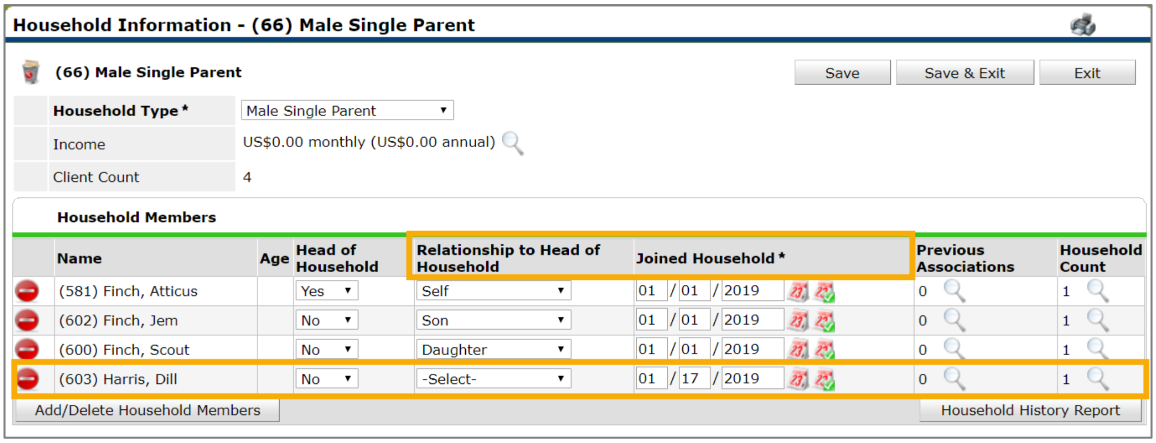


9. Once the section expands, fill out the new household member's name, name data quality, SSN, SSN data quality, veteran status, then click **Search**.
10. If the client appears in the search results, click the green plus sign to add them to the household. If the client does not appear in the search results, click **Add New Client with This Information**.
11. The new member's name will then appear in the **Selected Clients** section.
    a. Click **Continue** once all new household members have been added.



12. In the next **Household Information** pop-up, select the **Relationship to Head of Household** for the new member of the household.

13. Be sure that the new member's **Joined Household** date is the date that client started living in your program. (If you are in Back Date mode, this will automatically be set to the Back Date.)

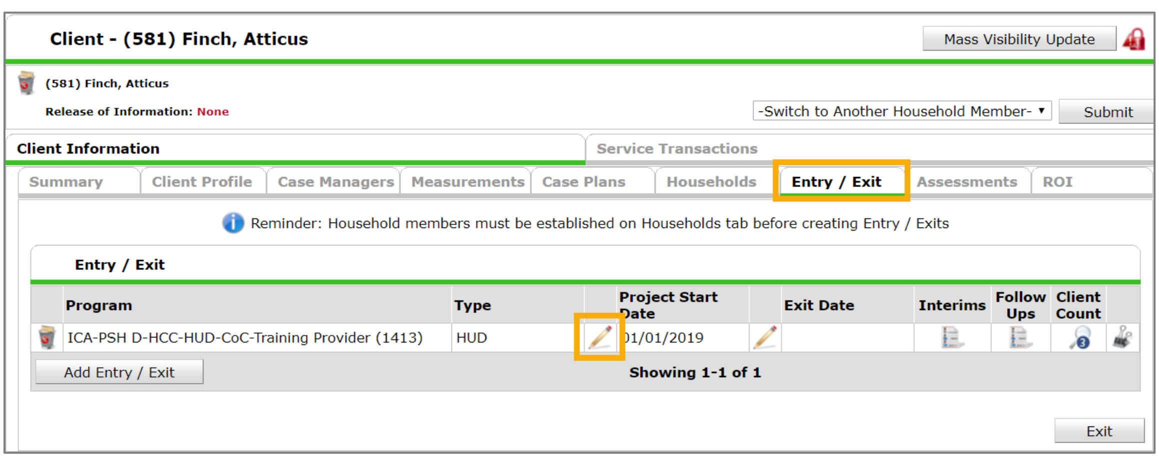


14. Scroll down to the **Universal Profile** assessment and complete the assessment questions for the new household member.
15. Click **Save & Exit** when completed.

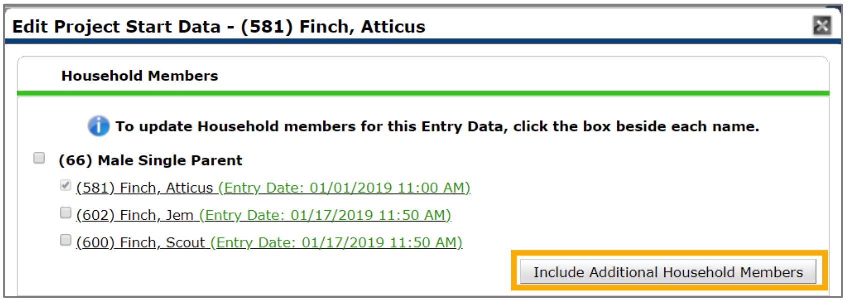
Important – You are not done at step 15 above! You must also complete the section below to ADD the new household member(s) to the existing Project Entry, or they will not be enrolled together in your program with the rest of the household. Please continue to the next section to complete the necessary steps.

ADDING THE NEW MEMBER TO THE HOUSEHOLD'S EXISTING PROJECT ENTRY

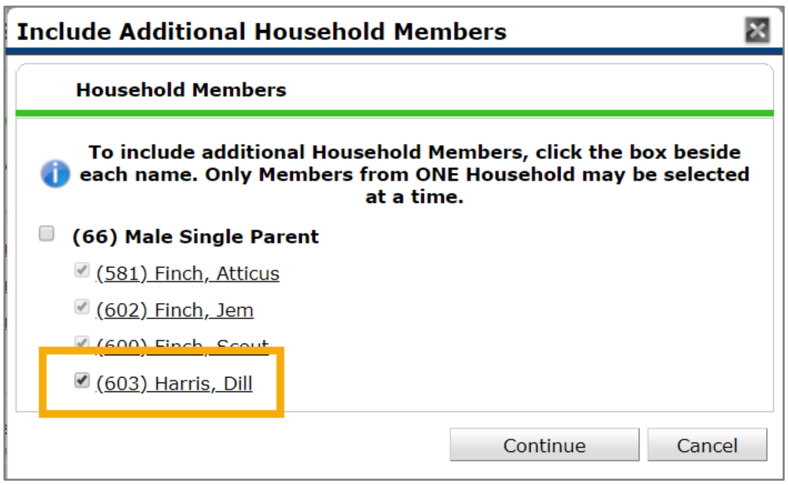
1. Enter the **Head of Household's** record, and navigate to the **Entry/Exit Tab**.
2. Click on the **edit pencil** next to the **Project Entry record** into which you will be adding the new household member:



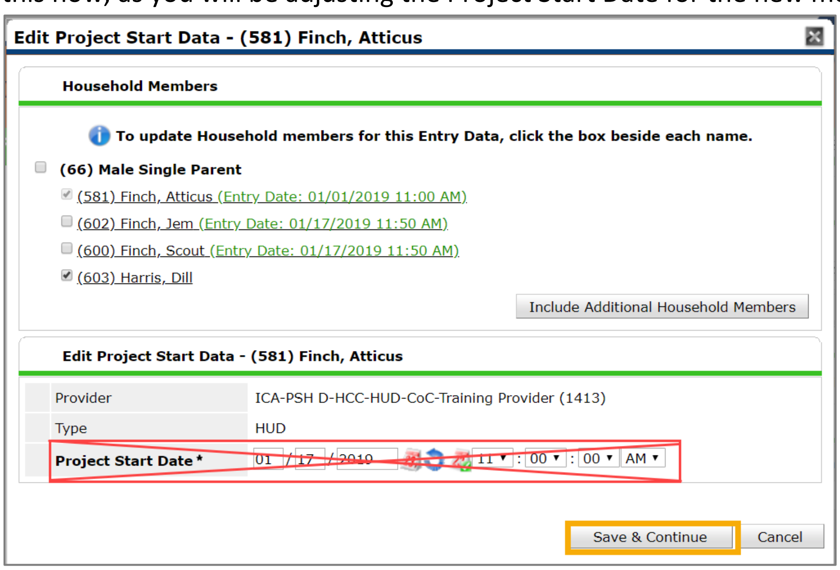
3. In the next "Edit Project Start Data" pop-up, click **Include Additional Household Members**:



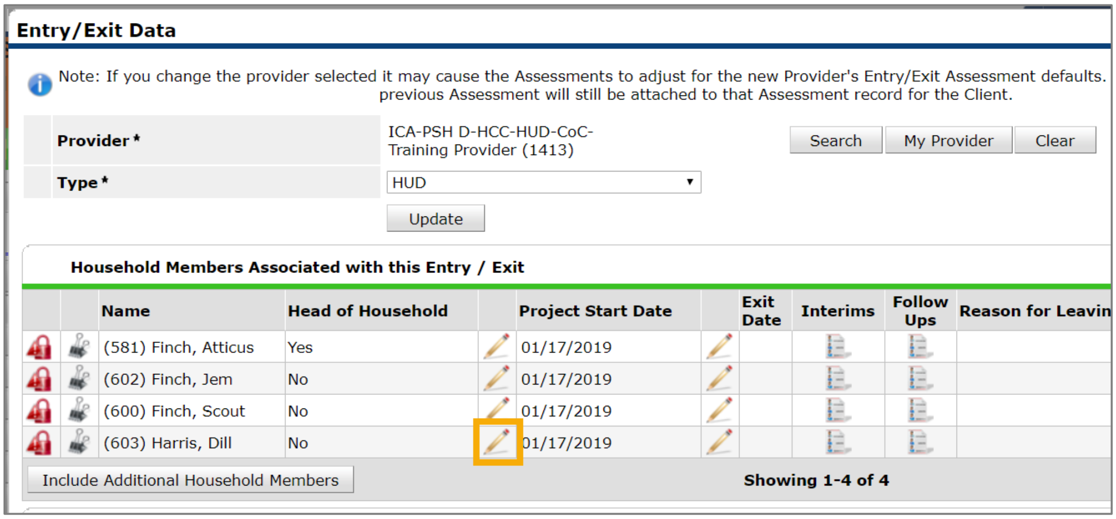
4. In the next Include Additional Household Members pop-up**, check the box** next to the new household member(s) you want to include, and then click **Save & Continue**.



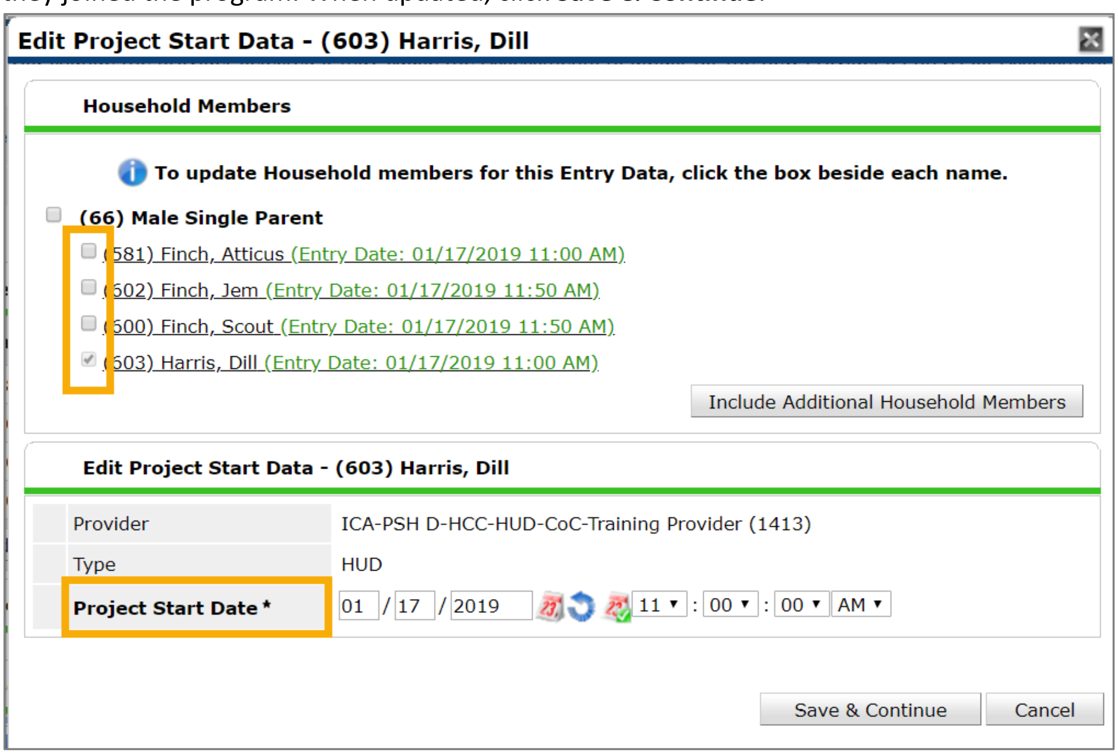
5. The system will then bring you back to the **Edit Project Start Data** pop-up window. The Project Start Date field will remain populated with the household's Project Start Date. Do not change this now, as you will be adjusting the Project Start Date for the new member in the next steps.



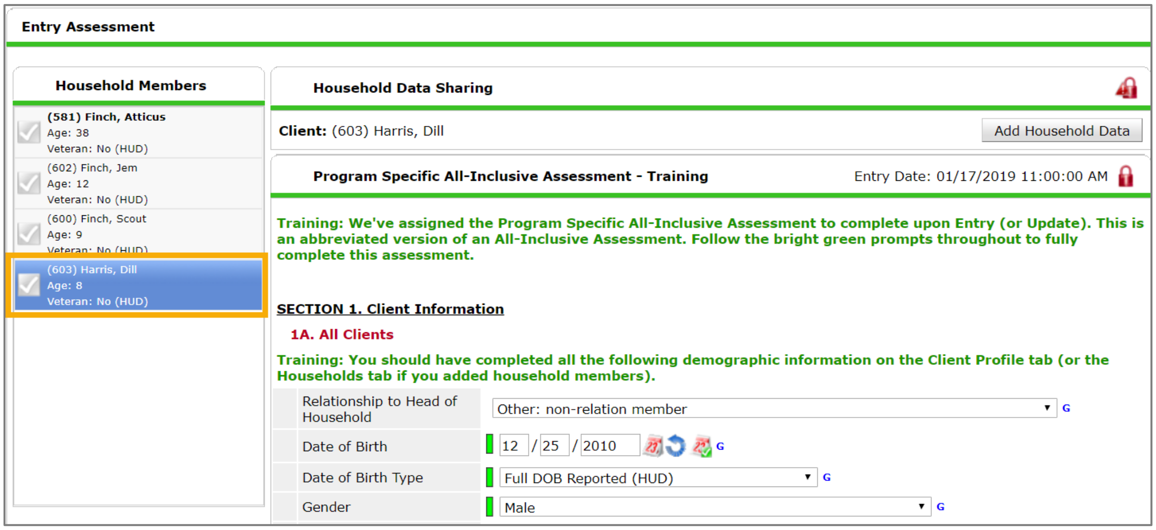
6. Click **Save & Continue**.
7. Next, at the top of the Entry/Exit Data window, click the **edit pencil** next to the Project Start Date of **the client who just joined the household**:



8. In the next Edit Project Start Data pop-up, **un-check** all members **except** the newly joining client.
9. This is where you'll want to make sure the new member's **Project Start Date** matches the date they joined the program. When updated, click **Save & Continue**:



10. Toggle to the new household member's name on the left-hand side of the screen, and then **complete all Entry assessment questions** for that client:



11. Once all assessment questions have been answered for the newly joining client, click **Save & Exit.**

ADDING A NEWBORN BABY TO A HOUSEHOLD

Often, the new member joining the household is a newborn baby. To do this, a user would follow the same instructions above to add the new child to both the household **and** to the family's enrollment in your program as well.

- The new child's Joined Household and Project Start Date should match either their Date of Birth, or the day they came home from the hospital.
- Be sure **not** to add a new Entry/Exit for the child! Instead you will be using the same process outlined in the sections above to include the child in the **existing** Entry/Exit for their family's enrollment.
- Unborn children – Please **DO NOT** enroll an unborn child into any programs. Wait until the child is born and then enter them into your project on their DOB or the day they came home.

WHEN A MEMBER LEAVES A HOUSEHOLD DURING A PROJECT STAY

Read this section carefully in the event that one (or a few) member(s) of a Household move out of your program while the rest of the Household is still enrolled.

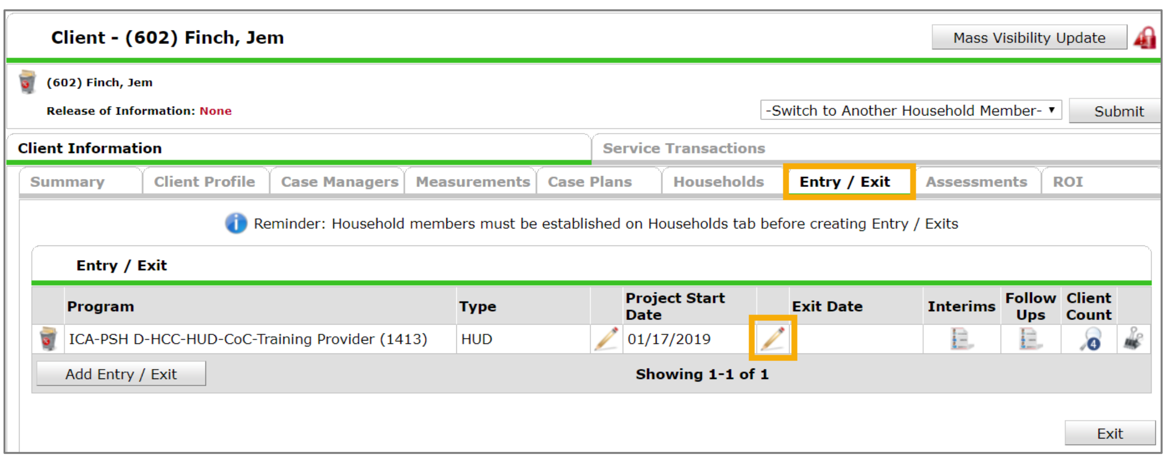
Important: **NEVER delete or remove a client from a household!**

Deleting a household member deletes previous associations and will likely cause errors on your reports and is very difficult to correct after the fact. When exiting a client who is part of a household, you only need to record an Exit Date for that one client from the program enrollment on the Entry/Exit tab, and on any corresponding Service Transactions on the Service Transactions tab.

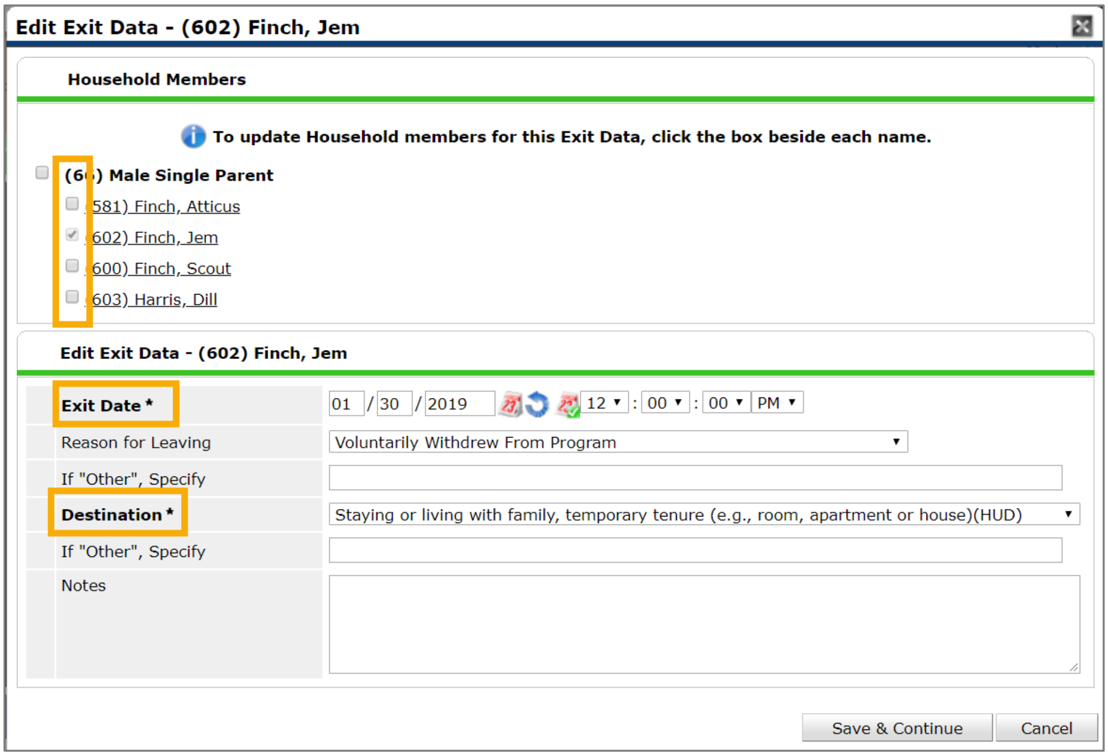
WHEN A NON-HEAD OF HOUSEHOLD MEMBER LEAVES

When a **non**-Head of Household member of the family leaves the program during a project stay:

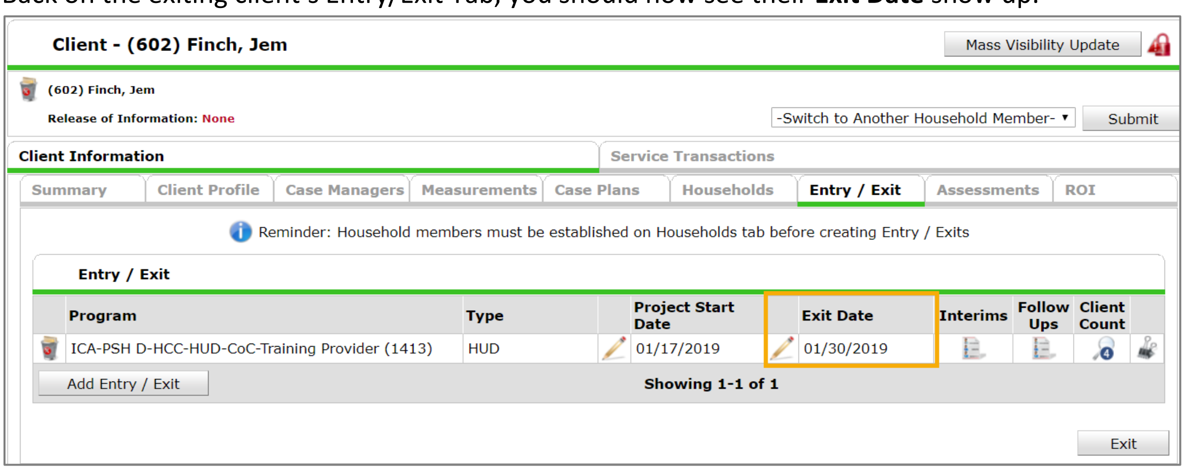
1. **EDA** to the provider that the client is exiting from.
2. Search for and open the record of **the client who is exiting your program**.
3. **Back Date** to the **date the client left** the household.
4. In the exiting client's record, navigate to the **Entry/Exit Tab**.
5. Locate the Entry/Exit row of the provider the client is exiting, and click on the **edit pencil** to the left of the blank **Exit Date**:



6. At the top of the next **Edit Exit Data** pop-up, be sure that there is a **check-mark** next to **only the client who is leaving** the program.
7. Since you are in Back Date mode, the **Exit Date** field should already be correctly set to the date the client left the program. Complete the **Exit Destination** for the client who is leaving, and then click **Save & Continue**:



8. In the next pop-up, **complete all** the Exit Assessment fields, and click **Save & Exit** when you are finished.
9. Back on the exiting client's Entry/Exit Tab, you should now see their **Exit Date** show up:



WHEN A HEAD OF HOUSEHOLD MEMBER LEAVES

When a **Head of Household** leaves and is officially exiting your program, but the rest of the household members will continue their enrollment in the program:

1. We recommend that you **contact the Helpdesk** in this situation, as a Head of Household change generally warrants creating a new Household, and the process can be complex.
2. Helpdesk will likely recommend that the user exit ALL household members on the date that the Head of Household left, and then create a new Entry/Exit with the new Head of Household and members who will be staying.

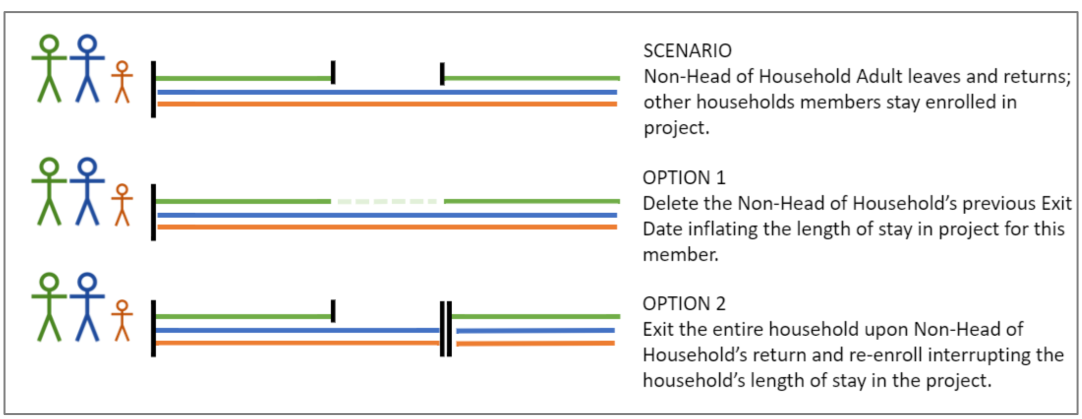
MEMBERS LEAVING AND RETURNING AGAIN FREQUENTLY

It can be challenging to document frequent changes in household composition in HMIS. Often a member or two within a household may leave and come back multiple time during one "household's" enrollment in your project. Some important factors to understand before you process household fluctuation:

1. A client can only have **one** entry date and **one** exit date associated with an Entry/Exit record.
2. There can only be **one** Head of Household per Entry/Exit record.

As a result, when a household member is exited from a program (an Exit Date is added to their Entry/Exit), but then they return at a later date, the user has two options:

- **Option 1** – Exit the whole household from the program and then create a new Entry to include the newly returned household member.
- **Option 2** – leave the household intact from the beginning of the stay, and only delete the transient client's original exit date.



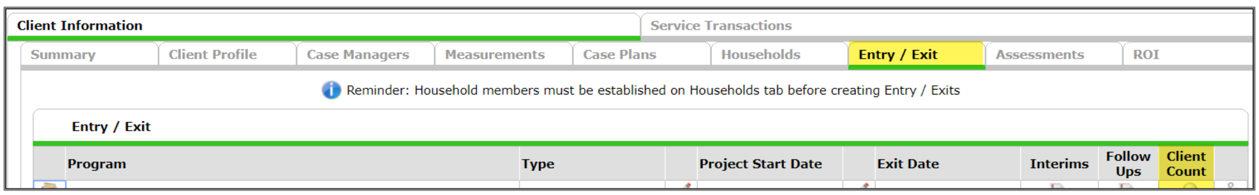
*As previously mentioned in this guide, if the Head of Household has *permanently* left the program, then our recommendation is Option 2 – exit the entire household and immediately re-enroll the remaining members with a new Head of Household identified.

CONNECTING AN UNATTACHED HOUSEHOLD MEMBER

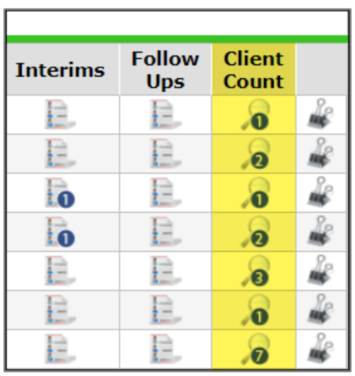
If a step is missed in the Households workflow, sometimes a household member or two can fail to become properly connected to their household's Entry into your program. This will often show up as a child reporting as their own Head of Household, or as a single client on a data quality report.

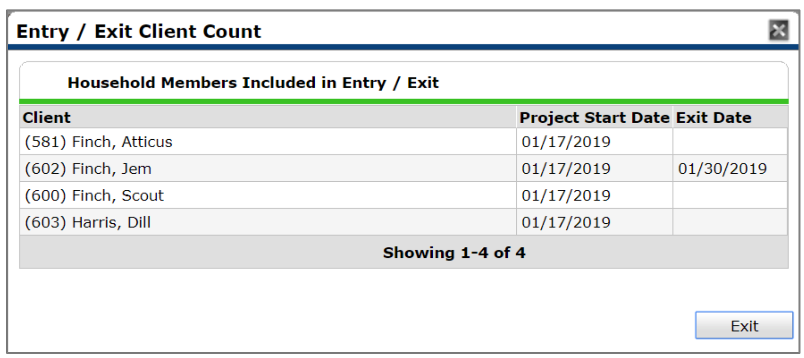
CLIENT COUNT PER ENTRY/EXIT

When you navigate to the **Entry/Exit Tab** on a client's record, you will notice a column titled **Client Count**, in which the little blue numbers indicate how many clients or household members are attached to that specific Entry/Exit:



You can click on the blue numbers for a pop-up that will show you specifically which household members are included:



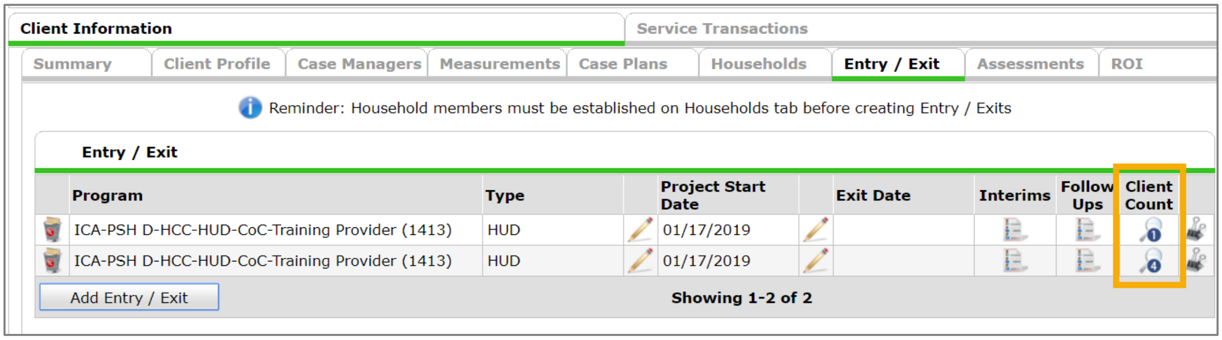


HOW TO RE-ATTACH A DISCONNECTED HOUSEHOLD MEMBER

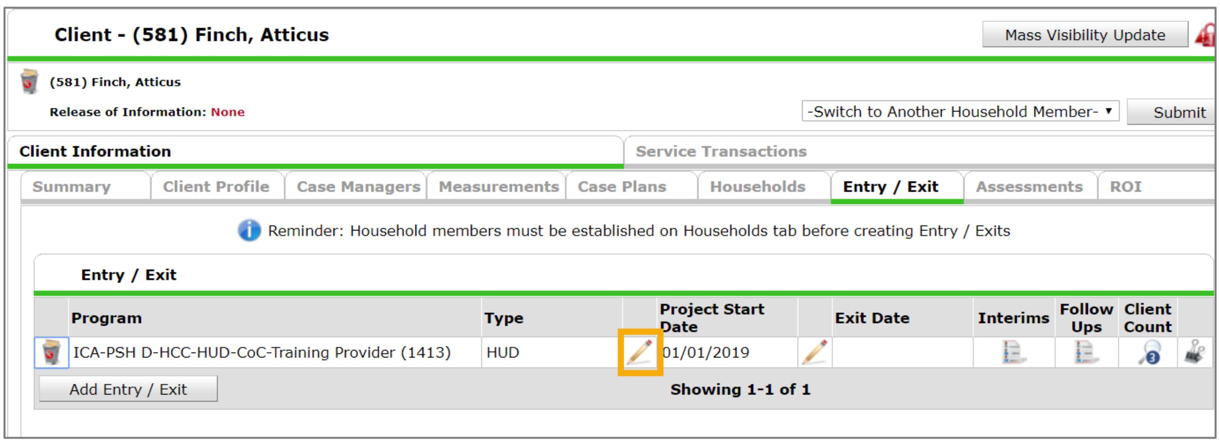
Follow these steps if you find that errors on your reports or data quality clean-up efforts in your CoC require you to find and attach a disconnected member to a household's Entry/Exit:

1. Search for a **enter the record** of the client who is showing up as disconnected from their household's entry, and navigate to the **Entry/Exit Tab**.
2. Click on the little blue number in the Client Count column on the row of the Entry/Exit into your provider to see if the correct number of clients.

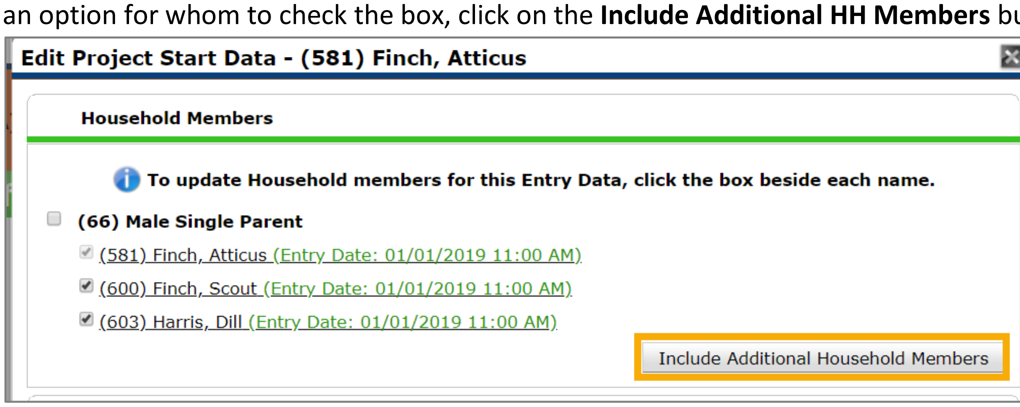
3. If you notice that they have an Entry/Exit that is only showing a little blue number 1 under Client Count, and the client is or was supposed to be enrolled as part of a multi-member household, that may be an indication that they were not correctly attached to their household's enrollment in your program:



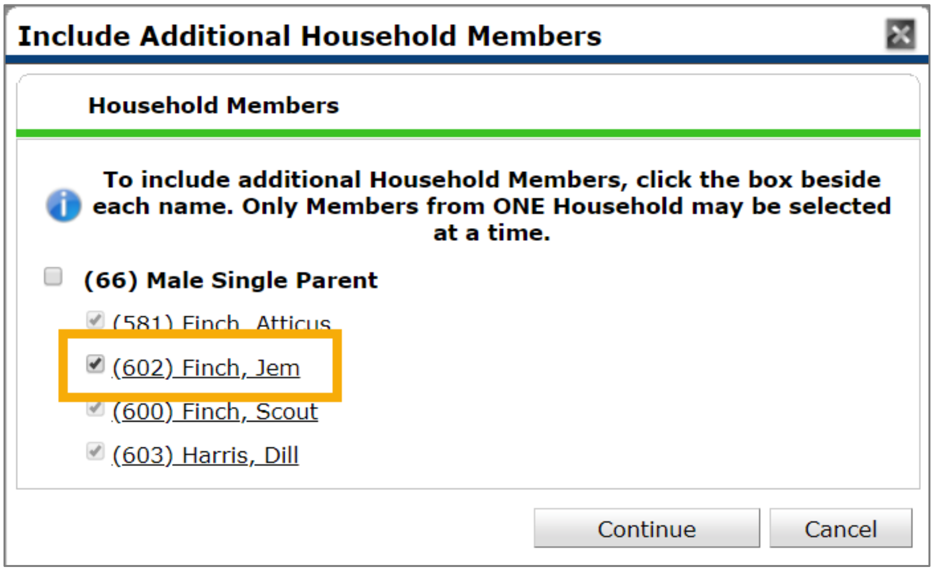
4. To fix this, **switch to the Head of Household's record**, and navigate to their **Entry/Exit Tab**.
5. Click on the **edit pencil** next to the **Project Start Date** for the Entry of the head of household into your provider:



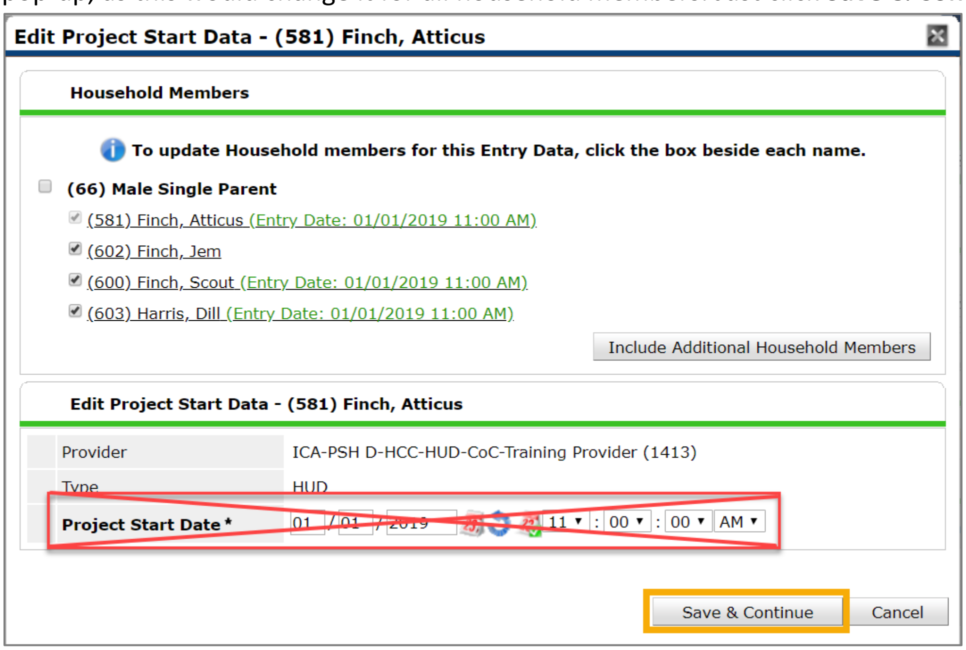
6. If you **do not** see the disconnected household member in the Edit Project Start Data pop-up as an option for whom to check the box, click on the **Include Additional HH Members** button:



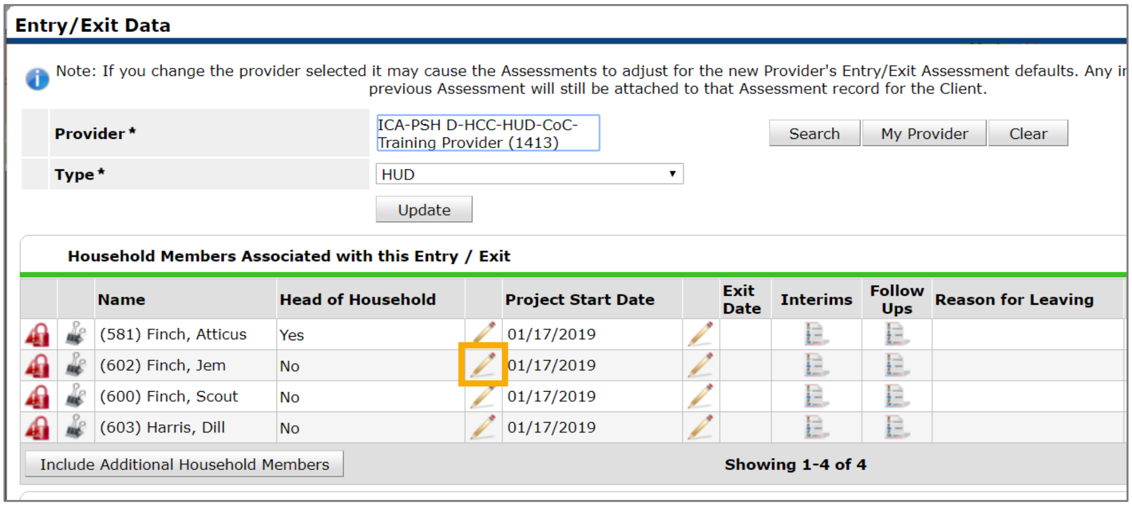
7. In the next Include Additional Household Members pop-up, **check the box** next to the disconnected member's name, and click **Continue**:



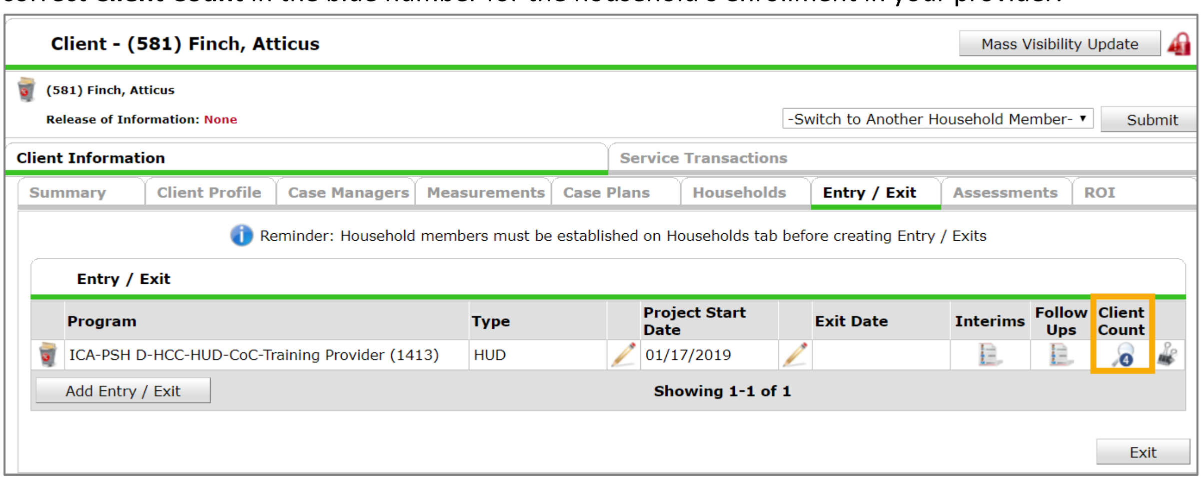
8. You **do not** need to change or adjust the **Project Start Date** at all in this Edit Project Start Data pop-up, as this would change it for all household members. Just click **Save & Continue**.



9. In the next Entry/Exit Data pop-up, click on **edit pencil** next to the **Project Start Date** for ONLY the unattached household member:



10. Then in the next Edit Project Start Data pop-up you can go ahead and update or the **Project Start Date** field for the disconnected member. Then click **Save & Continue**.
11. Update the Entry Assessment data for the client if needed, and click and Save & Exit.
12. Now that you are back on the Head of Household's Entry/Exit Tab, you should now see the correct **Client Count** in the blue number for the household's enrollment in your provider:



13. **Important**! Don't forget to **go back** to the formerly unattached member's record to **delete** any duplicate or incorrect Entry/Exits that may still exist from when they were incorrectly enrolled as a single client. To do this, click the **trashcan** icon to the far left of the incorrect Entry/Exit: