CREATING & MANAGING A HOUSEHOLD

This guide explains how to add client records to a household in Clarity Human Services. For further information, review the Help Desk Articles How Do I Create a Household and Manage Members?, Creating and Managing Program Enrollments, How Do I Add a New Household Member to an Enrollment?
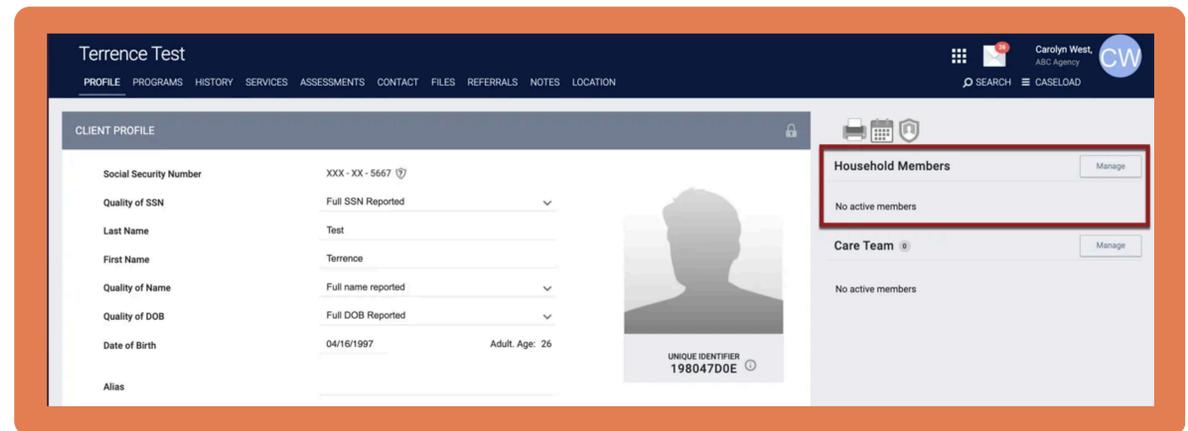
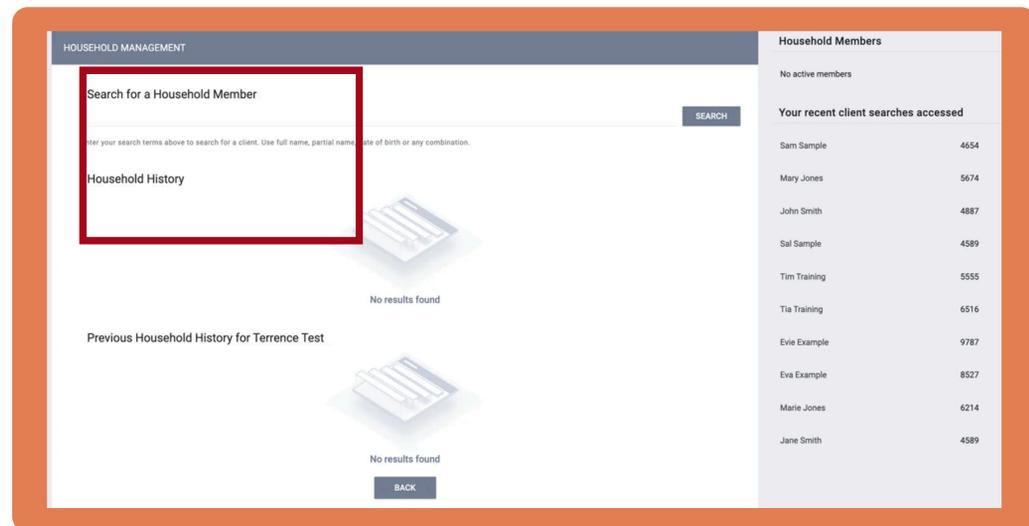Need Assistance?

TO CREATE OR MANAGE A HOUSEHOLD

Step 1

New client records are not associated with a household by default. To manage or view active members, click the MANAGE button in the Household Members section at the top of the right sidebar under the client's PROFILE page.
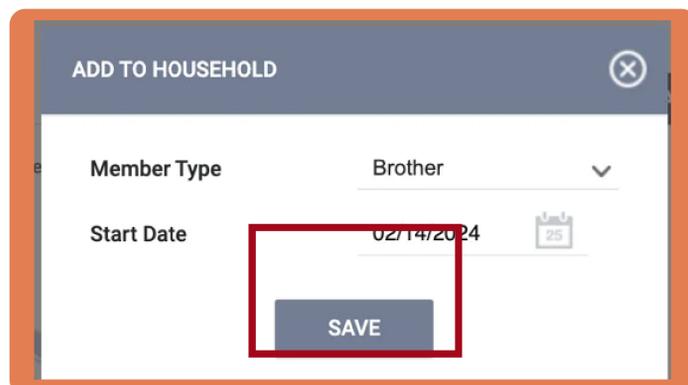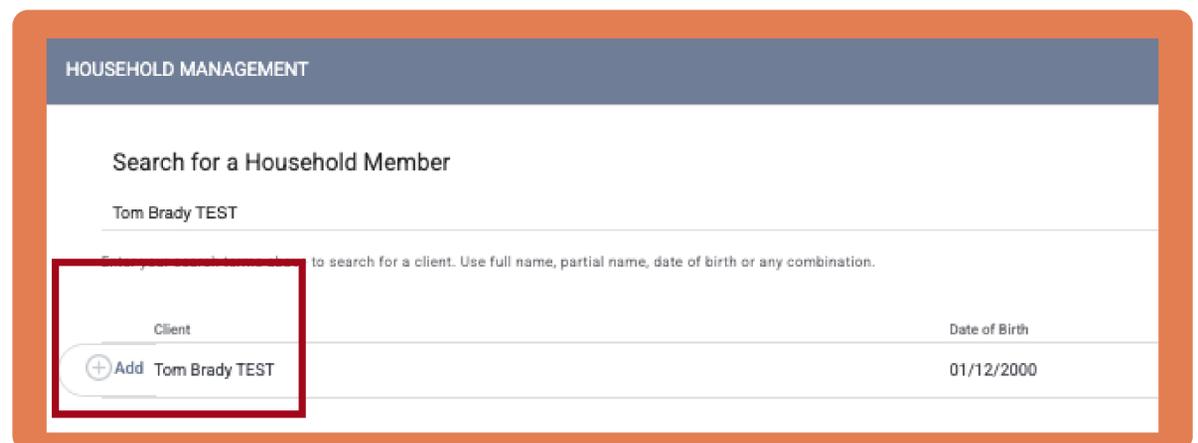

Step 2

Clicking Manage takes you to the HOUSEHOLD MANAGEMENT page. The left side of the page includes a SEARCH function and Household History information.

Step 3

To add this client to the current household: Search for the client and click the Add icon.

The ADD TO HOUSEHOLD pop-up appears. Select a Member Type and a Start Date, then click SAVE to add this client record to the Household.

ADD TO HOUSEHOLD

Member Type   Brother

Start Date   02/14/2024

SAVE

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Step 4

Additional options to add a household member: When you hover over a name in the Your recent client searches accessed section, you will see either an ADD icon (looks like a plus sign) or a JOIN icon (looks like two merging arrows).

A client with an "ADD" icon is not currently a member of any Household.

A client with a "JOIN" icon is already a member of a different Household.

Step 5

Next, the ADD TO HOUSEHOLD pop-up appears. Select a Member Type and a Start Date, then click SAVE to add this client record to the Household.
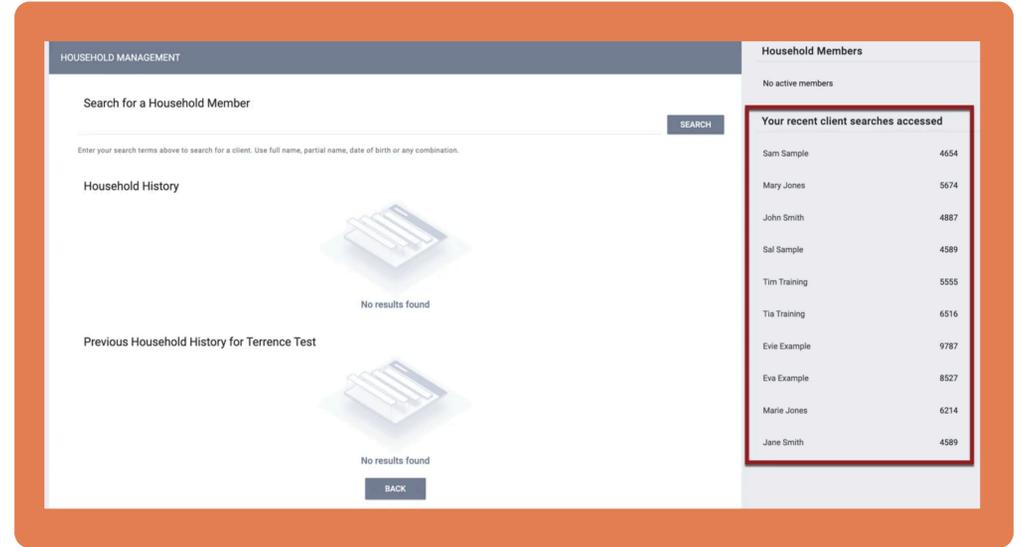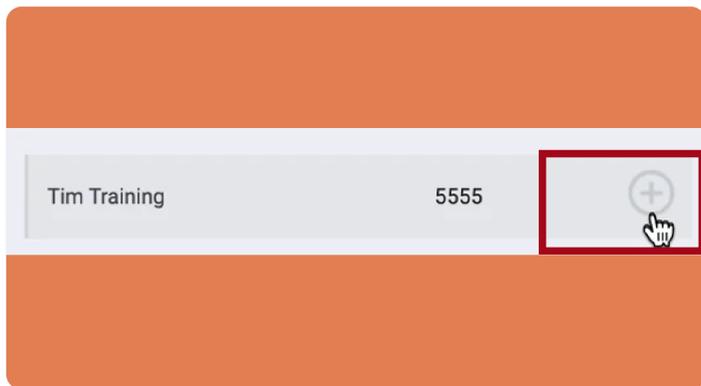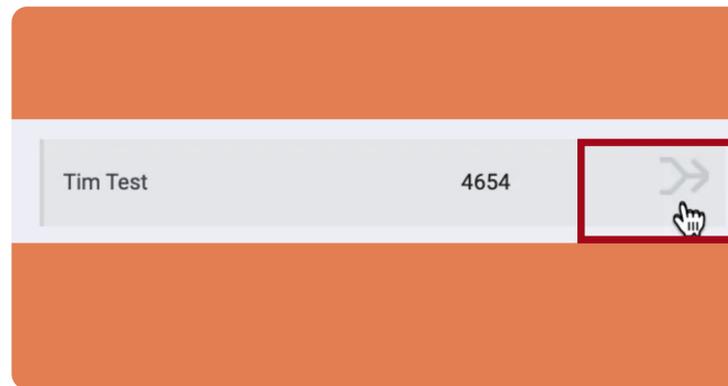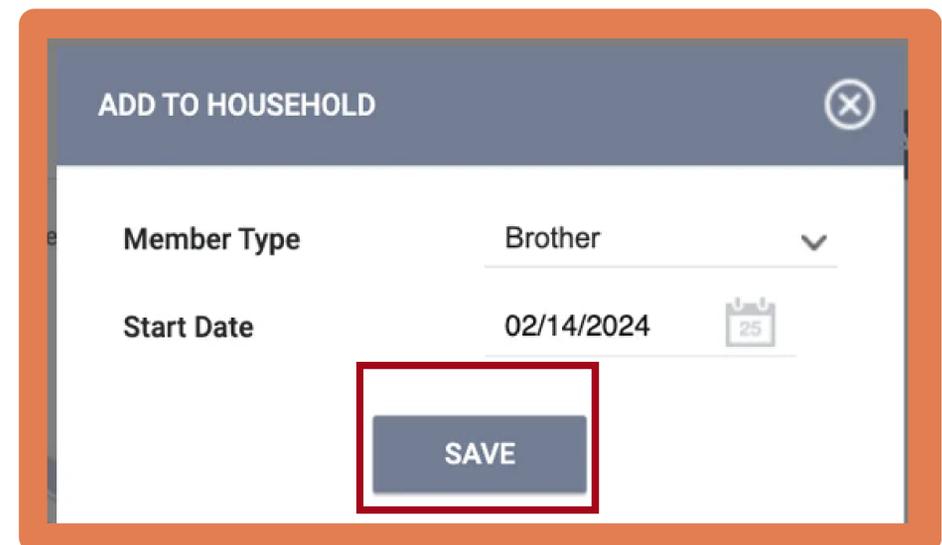
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## TO ENROLL A CLIENT OR HOUSEHOLD IN A PROGRAM

Step 6
Click the PROGRAMS tab in the client record. The PROGRAMS: AVAILABLE section lists programs provided by your agency that are available for client enrollment.

Step 7
To enroll a client/household into a program, click the down arrow next to the applicable program title. Additional information and options will display.
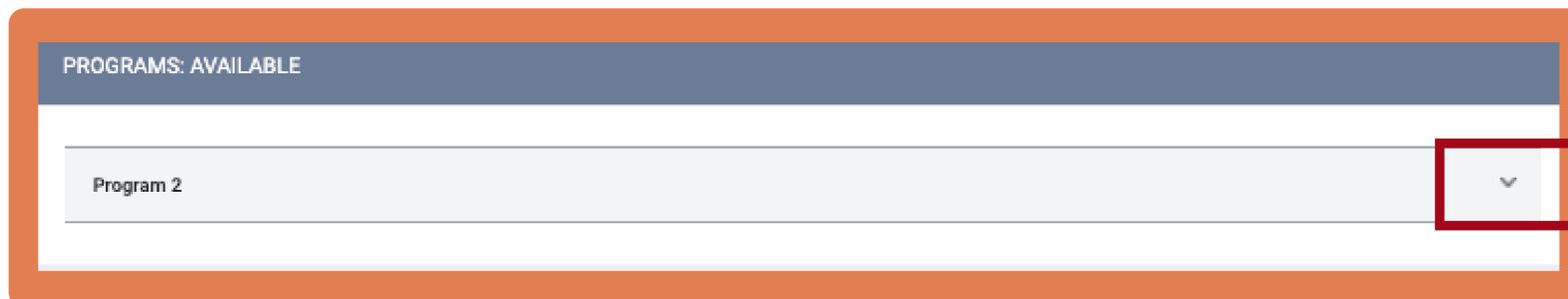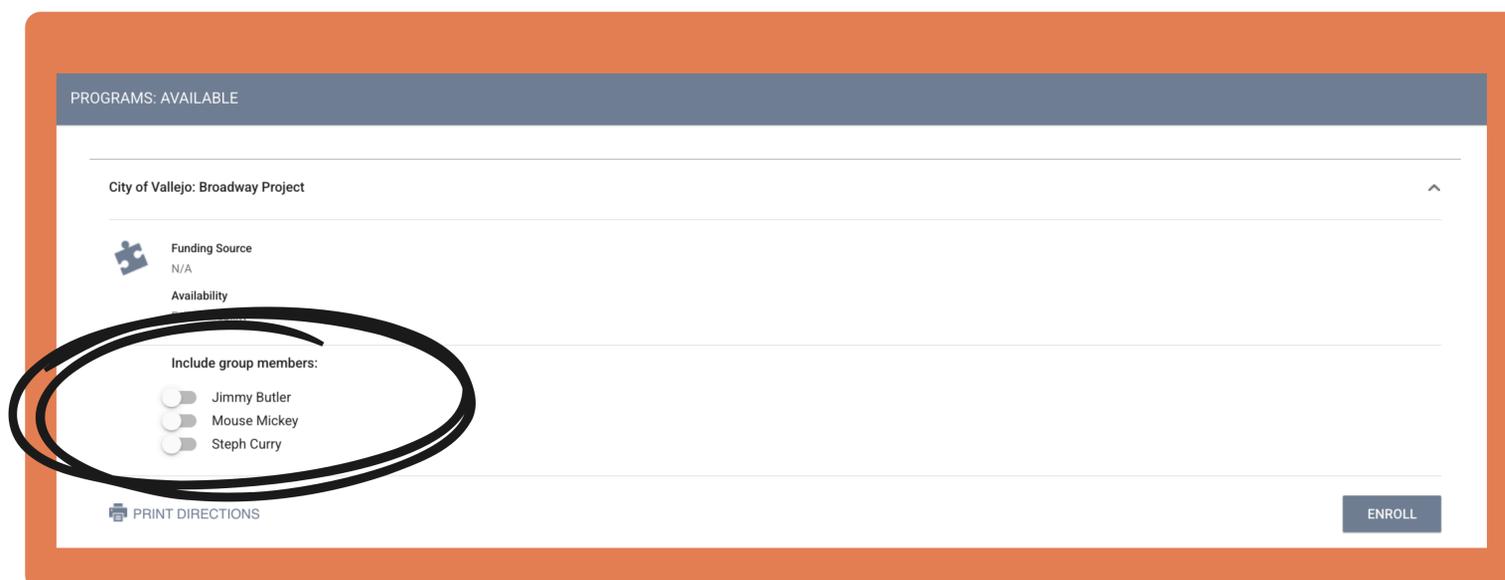

Step 8
Include Group Members
If you have created a family/household for the client, you will be prompted to select family/household members to include in the enrollment. Click the toggle(s) next to the family member(s) who should be enrolled in the program.

Note: Program group enrollment depends on the requirements of household types that can be served.

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HAVE QUESTIONS OR NEED ASSISTANCE PLEASE CONTACT THE HELP DESK OR EMAIL SUPPORT@BITFOCUS.COM

Need Assistance?

# ADDING A NEW HOUSEHOLD MEMBER TO AN ACTIVE PROGRAM ENROLLMENT

Step 9

Before adding a new household member to an active enrollment, ensure the client has been added to the household on the PROFILE page. Next, navigate to the client record for a household member included in the enrollment. Click the EDIT icon next to the active enrollment, either from the HISTORY tab or PROGRAMS tab.

PROGRAM HISTORY
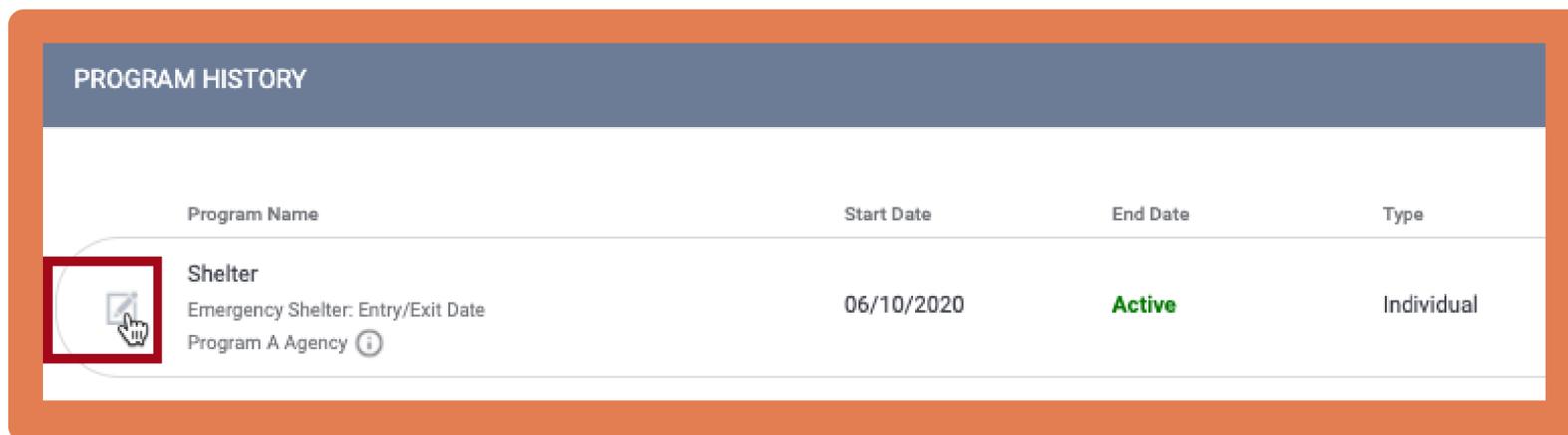
Program Name	Start Date	End Date	Type
Shelter Emergency Shelter: Entry/Exit Date Program A Agency ⓘ	06/10/2020	**Active**	Individual

Step 10

Click the ADD icon next to Program Group Members in the right sidebar.
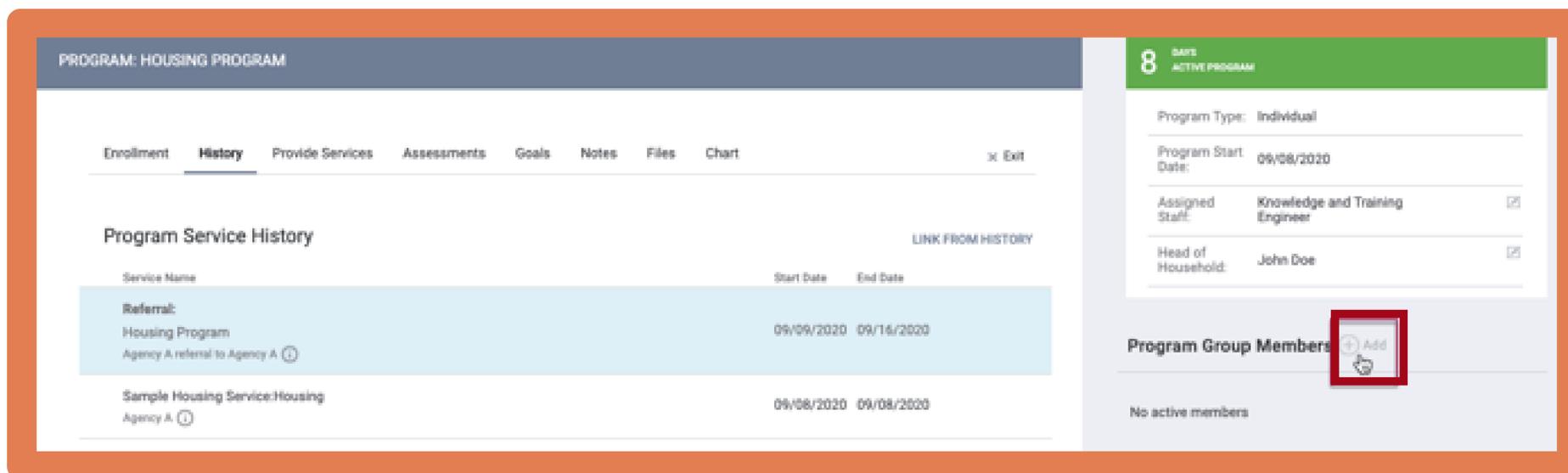
PROGRAM: HOUSING PROGRAM

Enrollment History Provide Services Assessments Goals Notes Files Chart ✕ Exit

Program Service History   LINK FROM HISTORY

Service Name	Start Date	End Date
Referral: Housing Program Agency A referral to Agency A ⓘ	09/09/2020	09/16/2020
Sample Housing Service:Housing Agency A ⓘ	09/08/2020	09/08/2020

8 DAYS ACTIVE PROGRAM

|	
Program Type:	Individual
Program Start Date:	09/08/2020
Assigned Staff:	Knowledge and Training Engineer
Head of Household:	John Doe

Program Group Members ⊕ Add

No active members

An ENROLL ADDITIONAL MEMBERS pop-up box will provide the option to add any group member who is not already included in the enrollment. Click the toggle next to the client(s) you wish to add. Click ENROLL.
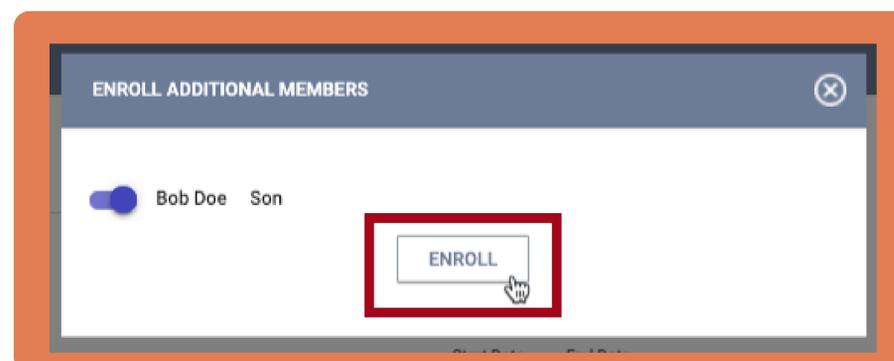
ENROLL ADDITIONAL MEMBERS ⊗

Bob Doe   Son

ENROLL