

Creating a New Household - Work Instructions



1.0 Overview

Step-by-step instructions for removing members from an existing household.

2.0 Work Instructions

1. Start a New Household

- Navigate to “Households” tab.
- Click “Start a New Household.”
- Select “Manage Household.”
- Select appropriate “Household Type.”

2. Add Desired Members to Household

- Search for a household member, if the client is already in the system, click on the **plus sign** to add them to the newly created Household.
 - If the search yields no results, you will need to create a client profile.
- Once all members of the household have been added, click on **Continue**.

1. Start a New Household

Add New Household

Household Type

Household Type * -Select-

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-		Date of Birth	/ /
Alias			DOB Data Quality	-Select-

2. Add Desired Members to Household

Household Information - (138) Single Individual

(138) Single Individual Save Save & Exit Exit

Household Type * Single Individual

Income US\$0.00 monthly (US\$0.00 annual)

Client Count 1

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(94) Shmo, Joe	23	No	-Select-	04 / 29 / 2024	0	2

Add Selected Household Members Household History Report

Creating a New Household - Work Instructions



- 3. Answer Questions for Each Added Member
 - a. Answer **Head of Household** (Yes/No), **Relationship to Head of Household** and add a **Joined Household** date for each member of the household.
 - i. Make sure that only one person has answered “yes” to **Head of Household** and that their **Relationship to Head of Household** is marked “self.”
 - b. Click “**Save & Exit.**”

3. Answer Questions for Each Added Member

Household Size	3
Relationship to Head of Household	Head of household's child
Enrollment CoC	Self (head of household)
Translation Assistance Needed	Head of household's child Head of household's spouse or partner Head of household's other relation member (other relation to head of household)
Covered by Health Insurance	Other: non-relation member Data not collected

3.0 Resources

3.1 Referenced Material

- [2024 HUD Data Standards](#)

3.2 Related Material

- [2024 Client Profile Tab Work Instructions](#)

3.3 Contacts

- HMISAdmin@clackamas.us