

# Removing Members from an Existing Household - Work Instructions



## 1.0 Overview

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

## 2.0 Work Instructions

### 1. Identify Existing Household

- Navigate to **“Households”** tab.
- Identify which household you will be adding a member(s) to.
- Select **“Manage Household.”**

### 2. Add Desired Members to Household

- Select **“Add/Delete Household Members.”**
  - Click on the triangle next to **“Add Clients to Household.”**
  - Fill out necessary information to search system for an existing client.

### 1. Identify Existing Household

Client - (1368047) Doe, John

(1368047) Doe, John

Release of Information: None

-Switch to Another Household Member- Submit

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans

▼ (669033) Couple With No Children

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(1368251) Doe, Jane		No		04/15/2024	0	1
(1368047) Doe, John	27	No		04/15/2024	0	1

Manage Household

▶ Previous Households

### 2. Add Desired Members to Household

Add/Delete Household Members - (137) Single Individual

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(94) Shmo, Joe	23	Yes	Self	01/01/2024	0	1

▼ Previous Household Members

This Household does not have any previous members.

▶ Add Clients to the Household

Continue Cancel

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### 3. Remove Desired Member(s)

- a. Click on the red minus sign next to the household member(s) that you are removing.
- b. Enter the date of when the client left the household and click **“Save.”**
  - i. This can be the actual date the client left the household (if known), or the date you learned that they left.
- c. Verify that the Household Type is still accurate, adjust if necessary.
  - i. If the household member who is leaving was the Head of Household (HoH), select one of the remaining household members as the new HoH.
- d. After removing a member from the household, they must also be closed (exited) from your program’s entry starting on step #4 on the next page.

**Note:** The removed household member will still be listed under **“Previous Household Members”** and can easily be added back in by clicking on the curved arrow.

### 3. Remove Desired Member(s)

Household Type *	Couple With No Children
Income	US\$0.00 monthly (US\$0.00 annual)
Client Count	2

  

Household Members						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *		Previous Association
(2) Gump, Forrest		Yes	Self	07 / 10 / 2024		0
(18) Gump, Jenny		No	Significant other	07 / 10 / 2024		1

~~Add/Delete Household Members~~ Household

▶ Previous Household Members

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4. **Exiting Removed Household Members from a Program Entry**
  - a. Go to the removed household members client profile and navigate to the **“Entry/Exit”** tab.
  - b. Find your program’s entry or entries and click on the **pencil icon** next to the Exit Date column.
  - c. In the pop-up, make sure that only the removed household member’s name has a checkmark.
    - i. Fill out the exit assessment and select **“Save & Continue.”**
  - d. If the removed household member is still being served by your program, open a new Program Entry.
    - i. The Project Start Date for this new entry will be the same date as the date they left their household.

## 4. Exiting Removed Household Members from a Program Entry

**Edit Exit Data - (18) Gump, Jenny**

**Household Members**

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

- (1) Couple With No Children
- (21) Gump, Ernest
- (18) Gump, Jenny

**Edit Exit Data - (18) Gump, Jenny**

**Exit Date \*** 07 / 23 / 2024

**Reason for Leaving** Left for housing opp. before completing program

**Destination \*** Rental by client, no ongoing housing subsidy (HUD)

**Save & Continue** **Cancel**

5. **Recording a New Head of Household (HoH) within a Program Entry**
  - a. If the removed household member had been marked as the HoH, you must take extra steps to make sure the new household has a member marked as HoH.
  - b. Go to the new HoH’s **“Entry/Exit”** tab and click on the **pencil icon** next to *your program’s* start date.
  - c. Scroll down to **“Relationship to Head of Household”** and change the answer to **“self.”**
  - d. Using the navigation pane on the left side of the pop-up, go through each household member and check their **Relationship to Head of Household** and update their answers as needed.
    - i. Make sure that only one member is selected as **“Self.”**
    - ii. Once all members Relationship to Head of Household has been updated, select **“Save & Exit.”**

## 5. Recording a New Head of Household (HoH) within a Program Entry

**Entry Assessment**

**Household Members**

- (164) Winchester, Dean  
Age: 25  
Veteran: No (HUD)
- (165) Winchester, John  
Age: 54  
Veteran: Yes (HUD)
- (166) Winchester, Sam  
Age: 22  
Veteran: No (HUD)

**Household Data Sharing**

**Client:** (164) Winchester, Dean

**Relationship to Head of Household:** Self

**Date of Birth:** 04 / 06 / 19

**Date of Birth Type:** Full DOB Rep

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## 3.0 Resources

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### 3.1 Referenced Material

- [2024 HUD Data Standards](#)

### 3.2 Related Material

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

### 3.3 Contacts

- [HMISAdmin@clackamas.us](mailto:HMISAdmin@clackamas.us)