1.0 Overview

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

2.0 Work Instructions

1. **Identify Existing Household**
   a. Navigate to "**Households**" tab.
   b. Identify which household you will be adding a member(s) to.
   c. Select "**Manage Household**."

1. Identify Existing Household

2. **Add Desired Members to Household**
   a. Select "**Add/Delete Household Members**."
      i. Click on the triangle next to "**Add Clients to Household**."
      ii. Fill out necessary information to search system for an existing client.

2. Add Desired Members to Household

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Page | 1 of 4

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 Associa
⊖	(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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Page | 2 of 4

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.

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."

4. Exiting Removed Household Members from a Program Entry

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

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

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Page | 4 of 4