

Hot Topic Thursdays - Adding Household Members

August 28th, 2025



NC COALITION to
HOMELESSNESS end

Adding Household Member's Mid-Stay

ClientPoint









- Reasons for Addition
 - Birth of a child
 - Family member joins household
 - Friend joins household
 - Household member re-join's household

Household Tab Reminder

- A “roster” of who could be enrolled in a household
- Being in the household tab is JUST the first requirement to add clients to a project entry

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

▼ (64) Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(219) Lion, Scar	39	Yes	Self	08/17/2019	0 	1 
(221) Lion, Azizi	15	No	daughter	08/17/2019	0 	1 
(220) Lion, Kamari	3	No	son	08/17/2019	0 	1 
(222) Lion, Shenzi	10	No	daughter	08/17/2019	0 	1 

Manage Household

Entry/Exit Tab

- Only select the clients that are coming into the project at project start

Project Start Data - (219) Lion, Scar

Household Members










To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- (64) Single Parent
 - (219) Lion, Scar
 - (221) Lion, Azizi
 - (220) Lion, Kamari
 - (222) Lion, Shenzi

Entry/ Exit Tabs: Single client from Household cont.

- Notice the Client Count on the Entry/Exit Screen, which means Scar is the only client in the project


Entry / Exit									
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count			
 Heading Home - Rowan County - Emergency Shelter (7389)	HUD	 02/17/2020							

[Add Entry / Exit](#) Showing 1-1 of 1

Entry/ Exit Tabs: Multiple clients from Household cont.

- If we were to go and edit the Entry, we see the ability to ‘Include Additional Household Members’
- This means they were not removed from the Household because they weren’t on the Entry/Exit

Household Members

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

(64) Single Parent

- [\(219\) Lion, Scar \(Entry Date: 02/17/2020 11:22 AM\)](#)
- [\(221\) Lion, Azizi \(Entry Date: 02/17/2020 11:22 AM\)](#)
- [\(220\) Lion, Kamari \(Entry Date: 02/17/2020 11:22 AM\)](#)

Include Additional Household Members

Household tab is different than Entry/Exit tab

- Household tab sets up the roster for recording Intakes and Exits
- Don't delete! Only remove members from the Household tab for death or divorce
- Reports pull information from Entry/Exit tab

Start with the Household Tab



1. EDA into correct project



2. Back date to the date the new client joins the household



3. Click on the Household Tab



If the Household has one Client



1. On the Household tab, Start a New Household
2. Select the appropriate Household Type
3. Search for the new Household member
4. If client is not in search, add new client with this information

If the Household has one Client



5. Add all new household members as needed
6. Click Continue
7. Identify the HoH
8. Fill in the “Relationship to HoH” fields until all have been updated
9. Save and Exit

If the Household has more than one Client and is rejoining the household



1. On the Household tab, click Manage New Household to edit existing household
2. Update the Household Type
3. Click the black arrow in front of Previous Household Members
 1. If the client is in the list, click the circular blue arrow in front of the client's name
 2. Fill in the date the client rejoined the household and the relationship

If the Household has more than one Client and a new Client joins



1. On the Household tab, click Manage New Household to edit existing household
2. Update the Household Type
3. Click on Add/Delete Household members
4. Click the arrow in front of Add Clients to the Household
5. Fill in the Client's name and search
 1. If the individual appears in the search results, click the green button to add them to the household
 2. If the client does not appear in the search results, fill in the additional information and click **Add new Client with this Information**
 3. Repeat until all household members are listed within the bottom table.
6. Click Continue



If the Household has more than one Client and a new Client joins Cont'd



7. From the top “Household Members” table, fill in the relationship to HoH for each new household member
8. Confirm the “joined household” date matches when the new member actually joined the household
7. After the all "Relationship to Head of Household" fields have been updated, the "Joined Household" date, and "Household Type" field have all been confirmed, click **Save and Exit**.



Adding the New Client to the Existing Project Entry

Entry/Exit Tab



Entry/Exit Tab Cont'd

Locate the “Household Members Associated with this Entry/Exit” table

Click the entry pencil for the clients who just joined the household

- Uncheck all clients except the newly joining client(s)

Change the date to the date the new client(s) joined, click Save & Continue

*the newly joining clients should now show with their correct entry dates while the rest of the household should have their original entry dates



Entry/Exit Tab Cont'd

Complete the entry assessments for the newly joining family members

- Click on the new client(s) name on the left-hand side and complete applicable assessment questions



Once all entry assessments have been completed for the newly joining client(s), click Save & Exit

*If Move-In Date listed for the Head of Household the project is a permanent housing project and the Head of Household does have a Housing Move-In Date, the newly joining adult client(s) should have the Housing Move-In Date listed as the same Housing



Next Meeting:

Hot Topic: Start vs. Interim, Where to Correct Your Data

September 11th, 2025

10:00am-10:30am



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Hot Topic Thursday's

August and September

2025

Thurs
8/14

Exiting Household members

Exits happen! We will be discussing how to exit the HoH and all other members of the household from a project. Household members left behind contribute to poor data quality!

Adding household members

Come refresh your skillset on how to accurately remove and add household members to a project. We will dig in to every step of the process.

Thurs
8/28

Thurs
9/11

Start Vs Interim: Where to correct your data?

Building rapport with a client takes time. Thankfully, HMIS is flexible for you to update client profiles to reflect their experiences and life events over time. Please attend to have a discussion about when to use the start assessment, and when to use an interim update to edit a client profile.

How to Exit Inactive Clients

If a client needs to be unenrolled from a project, there are different considerations to make for each exit. No matter the project type, you need to be here to make sure you can exit these clients accurately for positive quality data outcomes!

THURS
9/25



Email Us: hmis@ncceh.org



NCCEH

Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



NCCEH