

Family Members: Folder

Any client(s) relationship to other clients within an enrollment are often entered in the ClientTrack database as families. ClientTrack uses the term “family” to refer to a household. HUD’s Data Manual* defines a household as, “[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed.”

**For information regarding online resources, see Introduction/Online Resources in the “HMIS Basic User 2025 Manual”.*

A client may be a member of multiple households but always has a “primary household” identified. The “Family Members” menu option allows the Client’s family/household members to be managed.

Tips and Tricks - *Correctly Editing Family Members - Rules of Thumb when working with family/household units*



1. Only one “Self” should exist per program enrollment.
2. If you need to add a family member, do so through a program enrollment: go to the relevant enrollment, click on the action button, and select “Add Family Member” on the drop down.
3. Do not add or change family member information outside of an enrollment.

- Family/Household Members and family associations play an integral role on how enrollments and services show up on key reports such as the APR, etc. As a result, it is vital that when altering or changing any elements related to the family association that you are careful and/or seek the assistance of the HMIS Systems Team (hmis@changinghomelessness.org)

If you need further assistance with altering or changing a family/household unit in ClientTrack, you can contact the HMIS Systems Team for additional guidance (hmis@changinghomelessness.org)

Tips and Tricks – Correctly Editing Family Members in Existing Enrollments

Steps to Navigate to the “Family Members” Folder

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Family Members” secondary sidebar* menu option. ClientTrack will navigate to the “Family Members” workspace container, and a dropdown menu will appear under the “Family Members” folder.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Search

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Case Notes

Assessments

Referrals

Services

Enrollments

Family Members

Family History

HMIS 2017 Veteran Information

Clients / Family Members

Lebron James
624

4/4/1994
904-555-8458

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Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed." (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

+

7 results found (+1).

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*
<input checked="" type="checkbox"/>	maria		smith	<input type="text"/>	Full name reported	03/05/1955	69	Full DOB Reported
<input checked="" type="checkbox"/>	Jane		Austin	<input type="text"/>	Full name reported	04/01/1985	39	Approximate or Partial DOB Reported
<input checked="" type="checkbox"/>	Lebron	Bradley	James	<input type="text"/>	Full name reported	04/04/1994	30	Full DOB Reported
<input checked="" type="checkbox"/>	James		Cleveland	<input type="text"/>	Full name reported	01/01/2000	24	Full DOB Reported
<input checked="" type="checkbox"/>	James		Bronny	<input type="text"/>	Full name reported	10/06/2004	19	Full DOB Reported
<input checked="" type="checkbox"/>	Jimmy		James	<input type="text"/>	Full name reported	05/05/2019	5	Full DOB Reported
<input checked="" type="checkbox"/>	Janise	LaVette	James	<input type="text"/>	Full name reported	03/11/2020	4	Full DOB Reported
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --

Save

Save & Close

Cancel

Navigate to Family Members Folder

Family Member Information Anatomy

7 results found.

Callout A: Points to the 'Birth Date' and 'Age' columns in the table header.

Callout B: Points to the 'Relationship to Head of Household' and 'Veteran Status' columns in the table header.

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* ↑↓	Age	Birth Date Quality*	Gender*	Please Specify	SSN	SSN Quality*	Relationship to Head of Household*	Veteran Status*	Race*	Additional Race and Ethnicity Detail	Pregnancy Status	Pregnancy Due Date
<input checked="" type="checkbox"/>	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported	Woman (Start if 20...)		080	45	4750	Other Family Member	Yes	white, Hispanic/Lat...		

Family Member Information Anatomy

Add new family member

7 results found.

Callout A: Points to the 'Birth Date' and 'Age' columns in the table header.

Arrows: One arrow points from the 'Add new family member' button to the table. Another arrow points from the 'Family member name' label to the 'First Name' field. A third arrow points from the 'Date of birth and age' label to the 'Birth Date' and 'Age' fields.

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* ↑↓	Age	Birth Date Quality*
<input checked="" type="checkbox"/>	maria		smith		Full name reported	03/05/1955	69	Full DOB Reported

Family member name

Date of birth and age

Family Member Information Anatomy

Gender* ⓘ Please Specify Woman (Girl, if chil...	SSN 086 45 4236	Relationship to Head of Household* Other Family Member ▾	Veteran Status* Yes ▾	Race* White, Hispanic/Lati...	Additional Race and Ethnicity Detail <input type="text"/>	Pregnancy Status	Pregnancy Due Date
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Gender

Social Security Number

Relationship to Head of Household

Veteran Status

Race and Ethnicity

Pregnancy Status and Due Date

Family Member Information Anatomy