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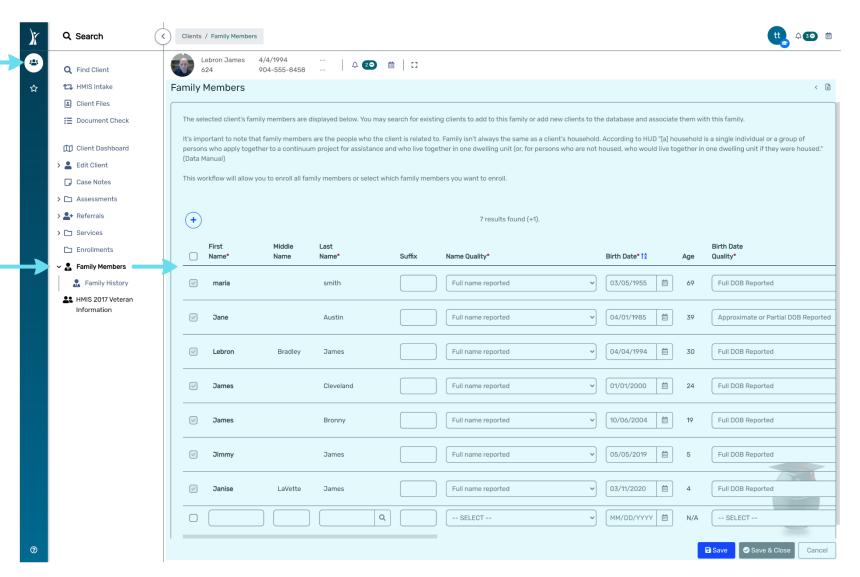
For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".

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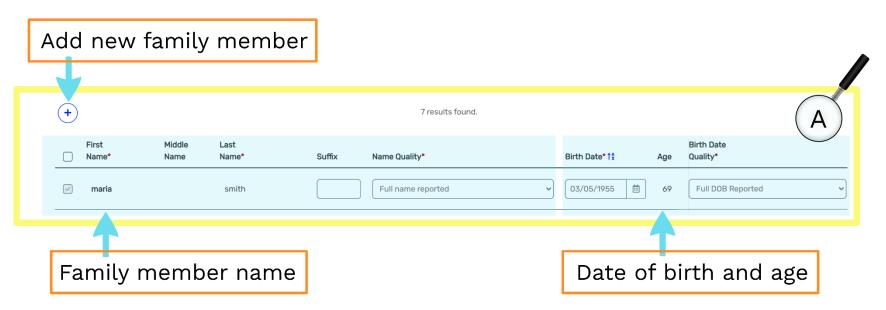
For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".
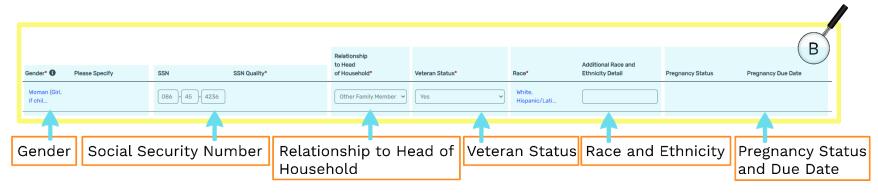
Navigate to Family Members Folder

Family Member Information Anatomy

Family Member Information Anatomy

Add new family member

Family member name

Date of birth and age

Family Member Information Anatomy

Gender*	Please Specify	SSN	SSN Quality*	Relationship to Head of Household*	Veteran Status*	Race*	Additional Race and Ethnicity Detail	Pregnancy Status	Pregnancy Due Date
Woman (Girl, if chil...		086 - 45 - 4236		Other Family Member	Yes	White, Hispanic/Lati...			

Gender

Social Security Number

Relationship to Head of Household

Veteran Status

Race and Ethnicity

Pregnancy Status and Due Date

Family Member Information Anatomy