Creating**/Adding*** Family Member(s) to and Existing “Family”*

** For instructions on how to add a new family member to a family and add the family member to a family’s existing enrollment, please see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment/*Editing an Existing Enrollment: Adding A Family Member.

*** For instructions on how to create a new family member without an enrollment, please see [Creating a New Client as a Family Member without An Enrollment]*

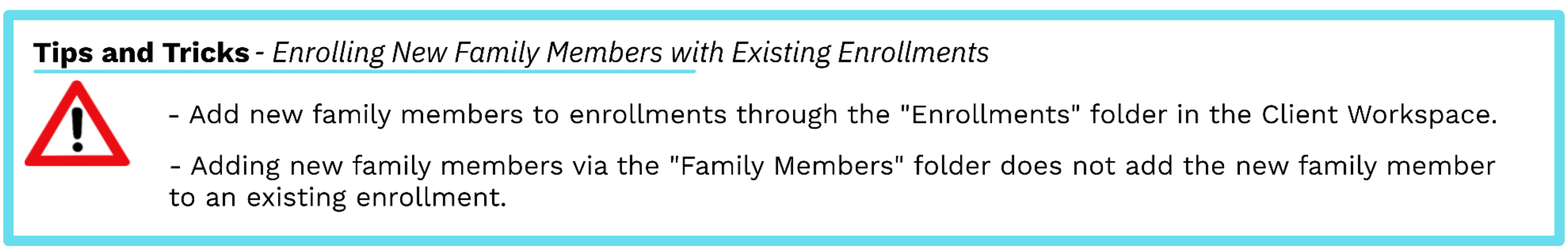
**** For instructions on how to add an existing client to a family without an enrollment, please see [Adding an Existing Profile to Another Family]*

Creating a New Client as a Family Member without An Enrollment

For instructions on how to add an existing client to a family without an enrollment, please see [Adding an Existing Profile to Another Family]

Adding a new family member through the “Family Members” folder adds a new family member without adding them to an enrollment*.

**For instructions on how to add a new family member to a family and add the family member to a family’s existing enrollment, please see Chapter 5: Basics of Entering Data into ClientTrack/Editing an Existing Enrollment/*Editing an Existing Enrollment: Adding A Family Member.



Tips and Tricks – Enrolling New Family Members with Existing Enrollments

<u>Steps to Creating a new Family Member Without an Enrollment</u>

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".

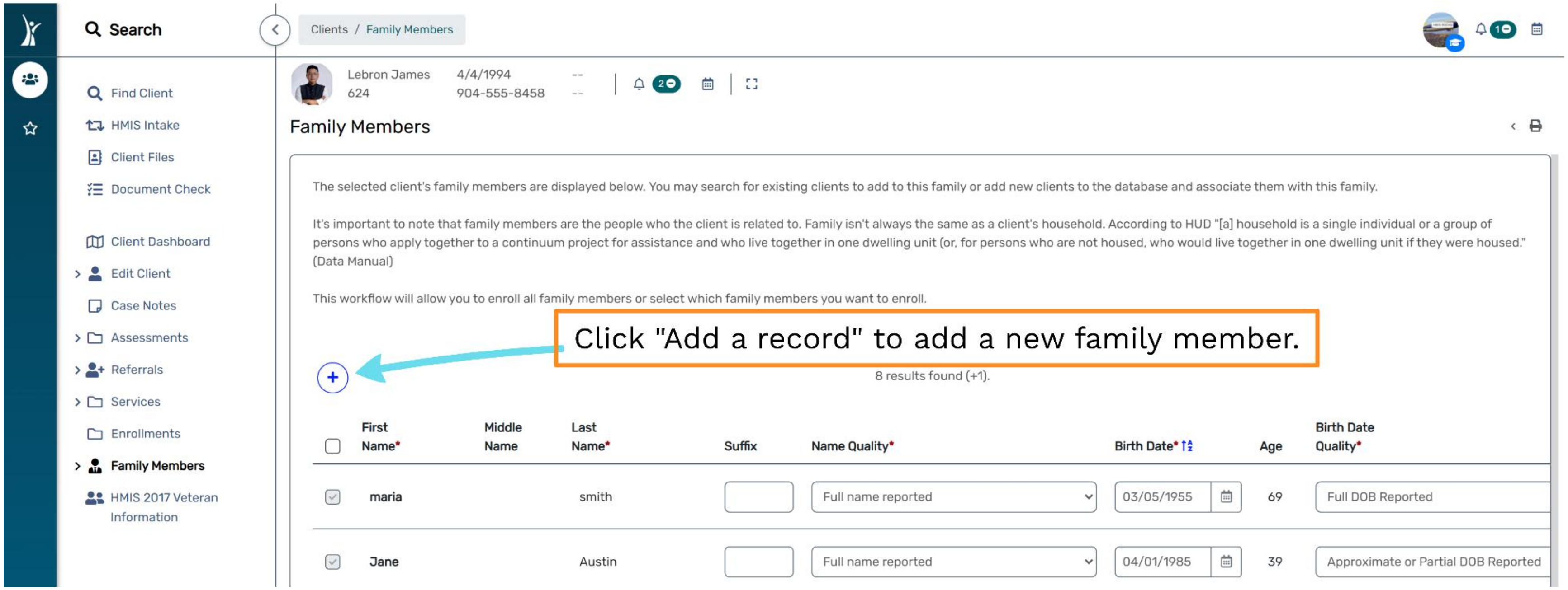
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

**** 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".

Step 3: Select the "Add a Record" plus sign icon in the "Family Members" workspace container or scroll down and select inside an empty box below the last family member. Fill out information as applicable. Required elements are marked with a (*).



Add a New Family Member without an Adding to An Enrollment

Family History: Subfolder

The “Family History” subfolder menu option is a record of a client’s family/household history. It will indicate the client’s current family/household.

Steps to Navigate to the “Family History” Subfolder

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”.

Step 3: Select the “Family History” subfolder from the dropdown menu on the secondary sidebar* menu option.

Adding an Existing Profile to Another Family

For instructions on how to create a new family member without an enrollment, please see *Creating a New Client as a Family Member without An Enrollment*

Steps to Adding an Existing Profile to Another Family

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”.

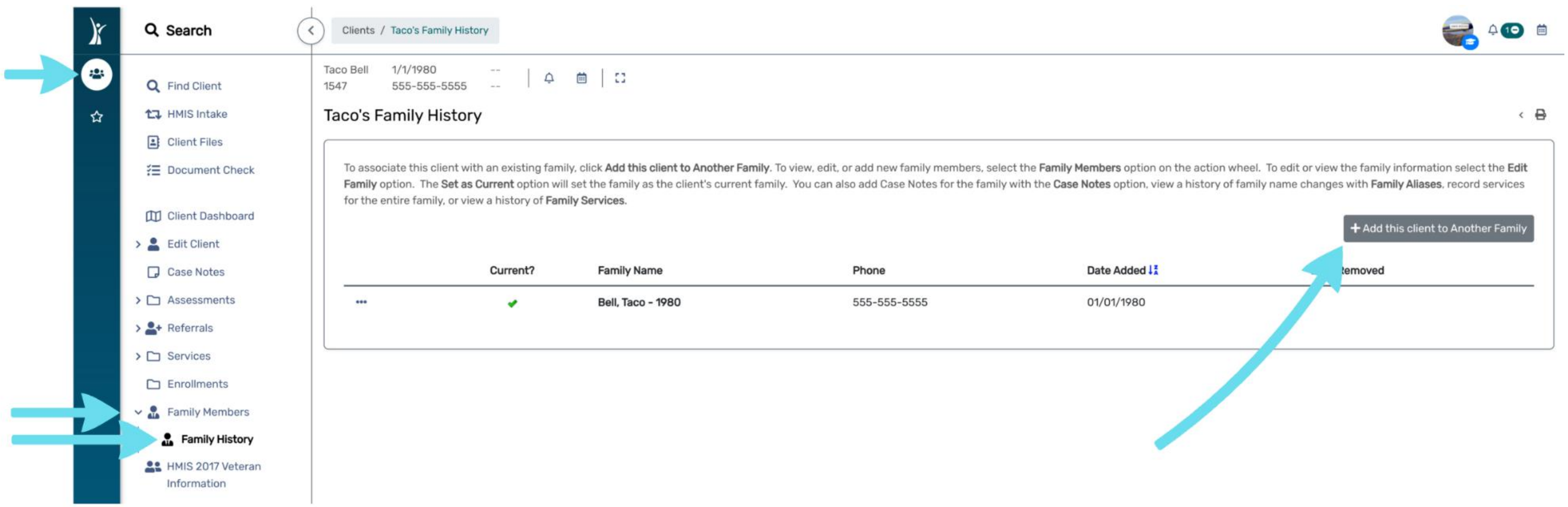
**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

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”.

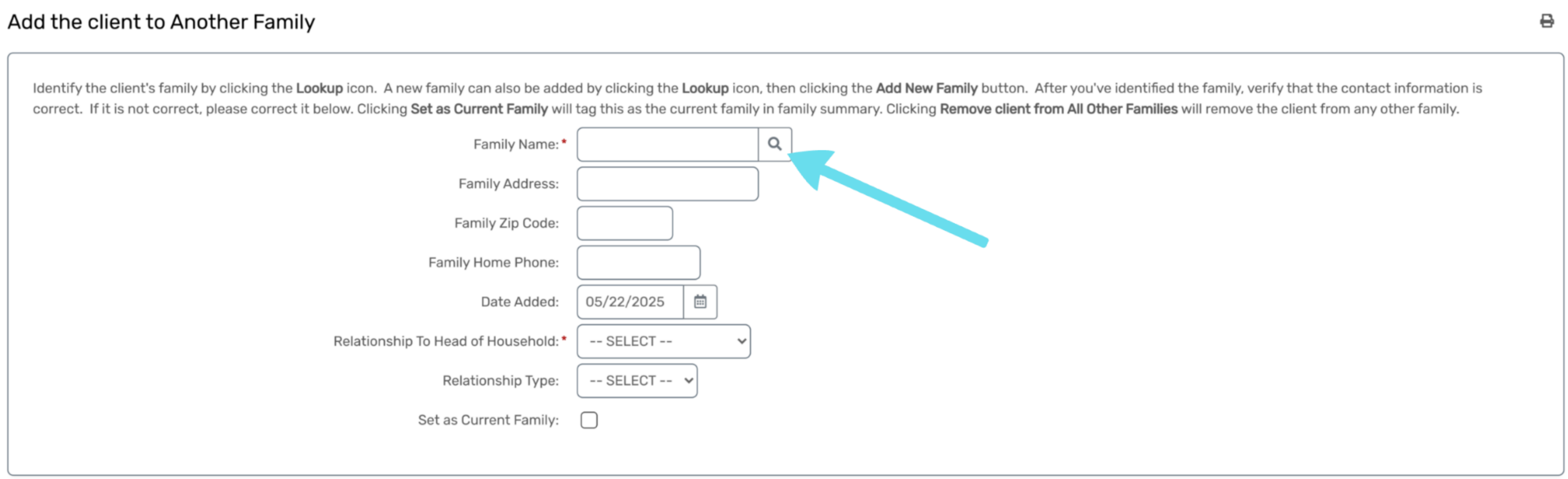
Step 3: Select the “Family History” subfolder from the dropdown menu on the secondary sidebar* menu option.

Step 4: Click the “Add this client to Another Family” button.



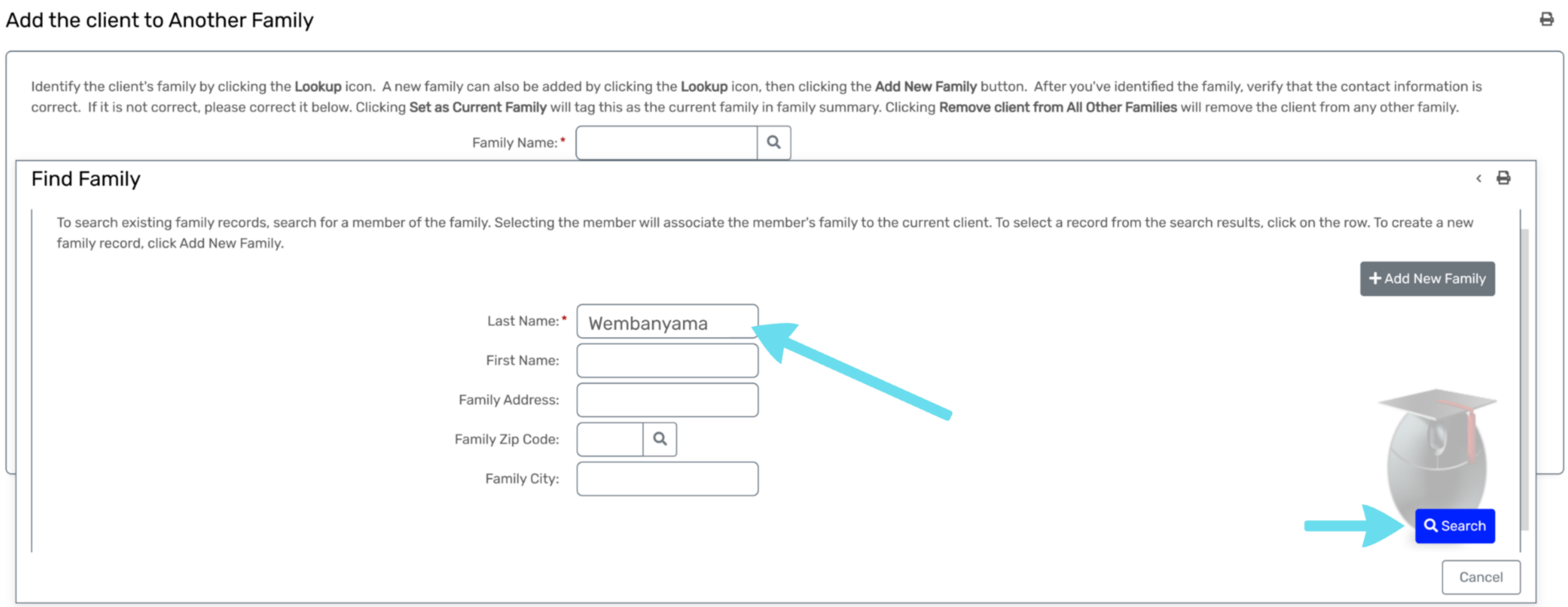
Add this Client to Another Family Button

Step 5: Click the search icon button to search for a Family Name.



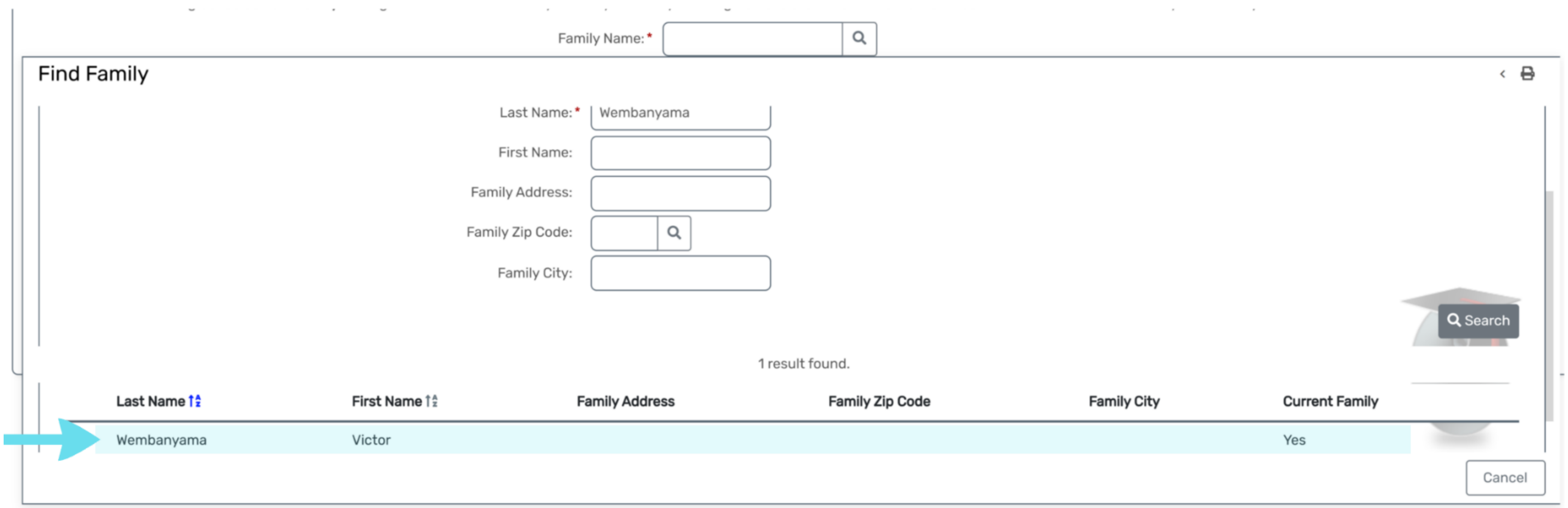
Add this Client to Another Family – Initiate Search for Family Name

Step 6: In the "Last Name" text box, type in the Family's last name for the appropriate family. Type in other search criteria as applicable as labeled in additional check boxes to identify a family. Click the search icon button to search for a Family Name. ClientTrack will display all applicable search results for the data entered.



Add this Client to Another Family – Search Family Name

Step 7: Scroll down to see search results. Click the appropriate family

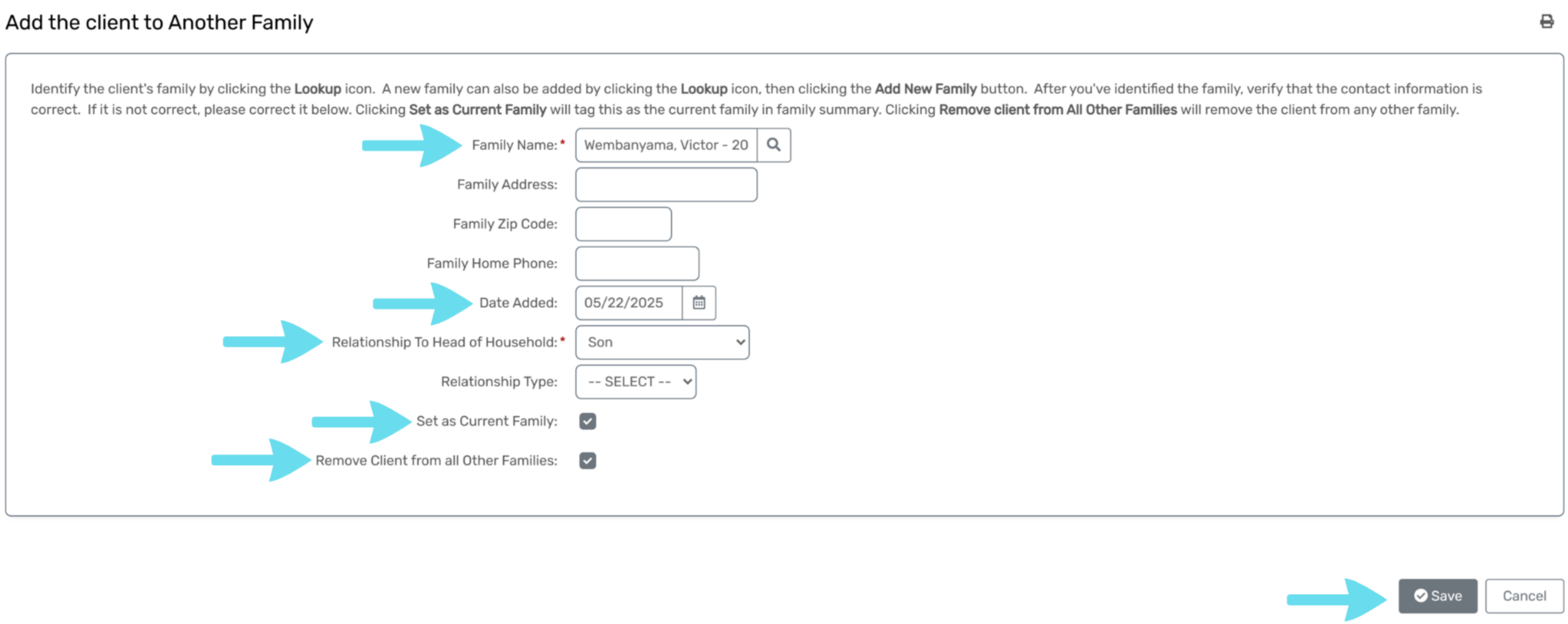


Add this Client to Another Family – Select Family

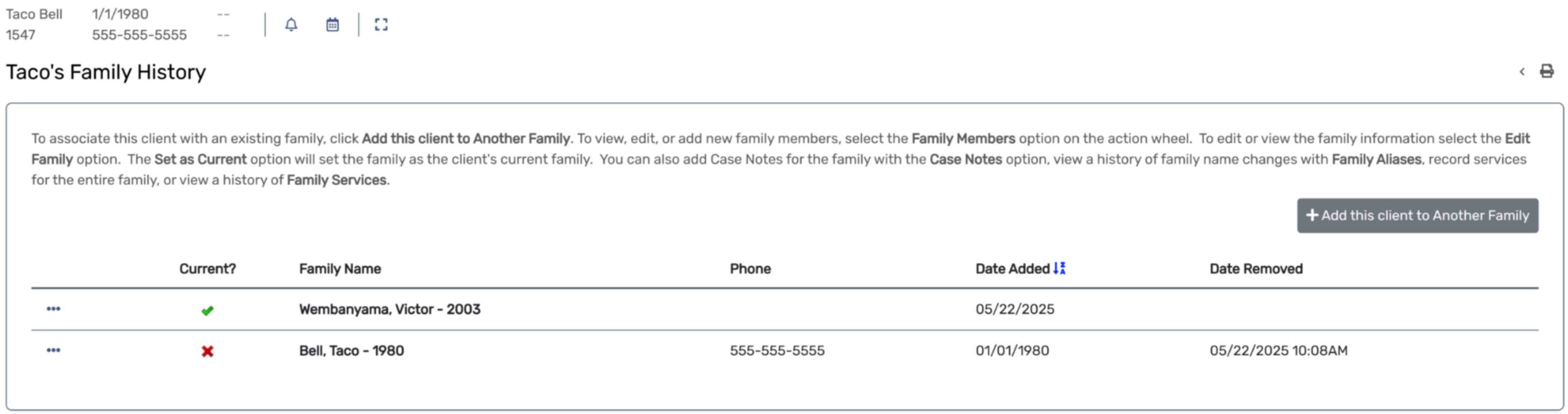
Step 8: Select the appropriate "Relationship To Head of Household". "Family Name" and "Date Added" will default to the client's name and current date, respectively.

In most circumstances, select "Set as Current Family:" and "Remove Client from all Other Families".

Click "Save" to save all entries or click "Cancel" to exit the form without saving. ClientTrack will navigate to the client's "Family History" workspace container. The client's family history will display the current and past family history.



Add this Client to Another Family – Select Family and Relationship Status



Add this Client to Another Family – Family History