# 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 <u>Creating a New Client as a Family Member without An Enrollment</u>
- \*\*\* 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



- Add new family members to enrollments through the "Enrollments" folder in the Client Workspace.
- Adding new family members via the "Family Members" folder does not add the new family member to an existing enrollment.

#### **Steps to Creating a new Family Member Without an Enrollment**

**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".

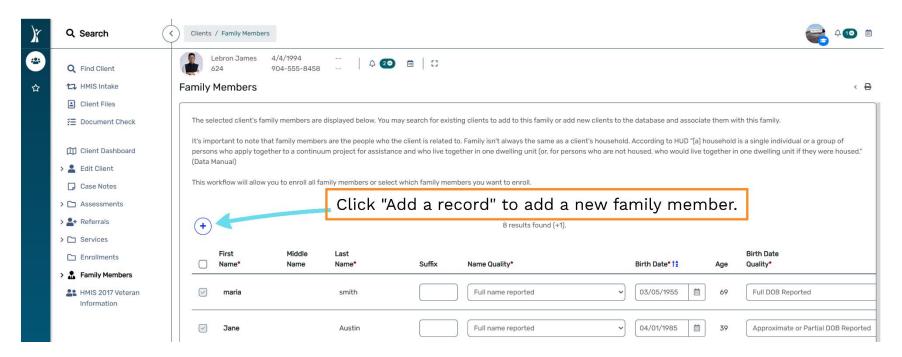
\*\* For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".

\*\*\* 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".\*\*\*

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**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 <u>Creating a New Client as a Family Member without An</u>

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".\*\*\*

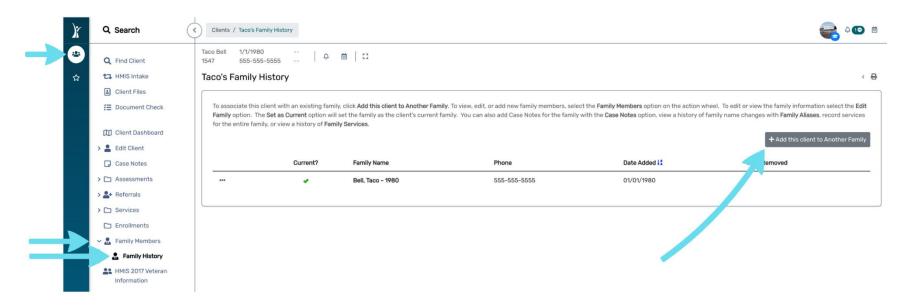
- \* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".
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- \*\*\* To learn how to navigate to the Home and Client workspaces, 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 the client to Another Family $\Theta$ Identify the client's family by clicking the Lookup icon. A new family can also be added by clicking the Lookup icon, then clicking the Add New Family button. After you've identified the family, verify that the contact information is correct. If it is not correct, please correct it below. Clicking Set as Current Family will tag this as the current family in family summary. Clicking Remove client from All Other Families will remove the client from any other family. Family Name: \* Family Address: Family Zip Code: Family Home Phone: Date Added: 05/22/2025 iii Relationship To Head of Household:\* -- SELECT ---- SELECT -- 🗸 Relationship Type: Set as Current Family:

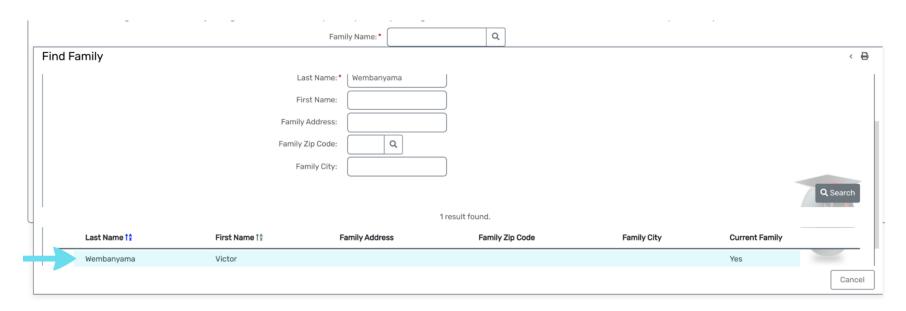
Add this Client to Another Family – Initiate Search for Family Name

**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.

# 0 Add the client to Another Family Identify the client's family by clicking the Lookup icon. A new family can also be added by clicking the Lookup icon, then clicking the Add New Family button. After you've identified the family, verify that the contact information is correct. If it is not correct, please correct it below. Clicking Set as Current Family will tag this as the current family in family summary. Clicking Remove client from All Other Families will remove the client from any other family. Family Name: 1 Find Family < ₽ To search existing family records, search for a member of the family. Selecting the member will associate the member's family to the current client. To select a record from the search results, click on the row. To create a new family record, click Add New Family. + Add New Family Last Name: Wembanyama First Name: Family Address: Q Family Zip Code: Family City:

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 the client to Another Family	₽
Identify the client's family by clicking the <b>Lookup</b> icon. A new family can also be added by clicking the <b>Lookup</b> icon, then clicking the <b>Add New Family</b> button. After you've identified the family, verify that the contact information is correct. If it is not correct, please correct it below. Clicking <b>Set as Current Family</b> will tag this as the current family summary. Clicking <b>Remove client from All Other Families</b> will remove the client from any other family.	
Family Name: * Wembanyama, Victor - 20 Q	
Family Address:	
Family Zip Code:	
Family Home Phone:	
Date Added: 05/22/2025	
Relationship To Head of Household:* Son	
Relationship Type: SELECT V	
Set as Current Family:	
Remove Client from all Other Families:	



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

Тасо Bell 1/1/1980 -- | Д 🖮 | СЗ

Taco's Family History

To associate this client with an existing family, click Add this client to Another Family. To view, edit, or add new family members, select the Family Members option on the action wheel. To edit or view the family information select the Edit Family option. The Set as Current option will set the family as the client's current family. You can also add Case Notes for the family with the Case Notes option, view a history of family name changes with Family Aliases, record services for the entire family, or view a history of Family Services.

+ Add this client to Another Family

	Current?	Family Name	Phone	Date Added 1 %	Date Removed
•••	•	Wembanyama, Victor - 2003		05/22/2025	
***	×	Bell, Taco - 1980	555-555-5555	01/01/1980	05/22/2025 10:08AM

Add this Client to Another Family – Family History