

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



- 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 (*).

Q Search
Clients / Family Members

- Find Client
- HMIS Intake
- Client Files
- Document Check
- Client Dashboard
- Edit Client
- Case Notes
- Assessments
- Referrals
- Services
- Enrollments
- Family Members**
 - HMIS 2017 Veteran Information

Lebron James
 624
 4/4/1994
 904-555-8458

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.

Click "Add a record" to add a new family member.

8 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

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.

The screenshot displays the HMIS client interface. On the left is a dark blue sidebar with a search bar and a list of navigation options: Find Client, HMIS Intake, Client Files, Document Check, Client Dashboard, Edit Client, Case Notes, Assessments, Referrals, Services, Enrollments, Family Members, Family History, and HMIS 2017 Veteran Information. A red arrow points to the 'Family History' option. The main content area shows the 'Taco's Family History' section for client 'Taco Bell'. It includes a table with columns: Current?, Family Name, Phone, Date Added, and an action column. A red arrow points to the '+ Add this client to Another Family' button in the top right of the main content area.

Current?	Family Name	Phone	Date Added	Action
***	Bell, Taco - 1980	555-555-5555	01/01/1980	removed

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



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

Relationship To Head of Household: * -- SELECT --

Relationship Type: -- SELECT --

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.

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: 

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:

First Name:

Family Address:

Family Zip Code: 

Family City:



[Cancel](#)

Add this Client to Another Family – Search Family Name

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

Family Name:

Find Family

Last Name:

First Name:

Family Address:

Family Zip Code:

Family City:

1 result found.

Last Name	First Name	Family Address	Family Zip Code	Family City	Current Family
Wembanyama	Victor				Yes

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 **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: * Wembanyama, Victor - 20

Family Address:

Family Zip Code:

Family Home Phone:

Date Added: 05/22/2025

Relationship To Head of Household: * Son

Relationship Type: -- SELECT --

Set as Current Family: ☒

Remove Client from all Other Families: ☒

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

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 ⌵⌵	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