DE-CMIS GUIDANCE:
HOW TO ADD ADDITIONAL HOUSEHOLD MEMBERS TO ENTRY

INTRODUCTION

This document's purpose is to provide guidance to Delaware CMIS users on how to enter new household member(s) to an already-existing project entry.

Situations where this is required may include, but are not limited to:

- A household having more members than documented and/or referred by Centralized Intake;
- A client having shared custody of a child where:
  - the child is only staying in a program part-time; or
  - client takes custody of child while enrolled in a program;
- A client having a new partner; or
- A client giving birth while enrolled in a program.

Following this workflow will avoid having families be pulled into reports as different households rather than one. System-wide, this can eliminate errors where unaccompanied minors are incorrectly enrolled under programs.

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TECHNICAL ASSISTANCE

For further clarification on adding new household members to already-existing project entries, contact Housing Alliance Delaware (HAD) at cmis.support@housingalliancede.org.

METHOD #1: CLIENTPOINT

1. Go to the profile of the Head of Household who is already enrolled in the project. Access their Households tab and check if the "new" household member(s) is in the household.

    a. If not, use the "Manage Household" button to add them. Do so by using a Client Search to see if they have a profile in CMIS, and if not, create one now. <u>Consult the ClientPoint Training PowerPoint for more guidance if needed (slides 21-24)</u>.

2. Update the client's Release of Information (ROI) by including the new household member(s).

    a. Select the pencil/edit icon to access the ROI.

    b. Click the "Include Additional Household Members" button.

c. Select the household member(s) who are being added to the project entry.

☐ **(25550) Male Single Parent**
    ☑ (1) Test, Justin A
    ☑ (108687) Test, Terri
    ☐ (103388) Test, Thomas

d. Click the "Continue" button, followed by the "Save Release of Information" button.

3. Go to the client's Entry/Exit tab, where you will use the pencil to access the client's already-existing project entry. Then, click "Save & Continue" to proceed.

4. At the top of the window, a "Household Members Associated with this Entry / Exit" is visible. Click the "Include Additional Household Members" button at the bottom.

5. In the "Edit Project Start Date" window:
    a. Select the household member(s) being added to the project entry.
    b. Change the Project Start Date to match when they joined the project.
    c. Click "Save & Continue".

a.

- ☐ **(25550) Male Single Parent**
  - ☑ (1) Test, Justin A (Entry Date: 09/01/2022 3:20 PM)
  - ☑ (108687) Test, Terri
  - ☐ (103388) Test, Thomas

Edit Project Start Data - (1) Test, Justin A	
Provider	Catholic Charities - Casa San Francisco ES (9)
Type	HUD
b. Project Start Date*	09 / 19 / 2022 3 ▾ : 20 ▾ : 56 ▾ PM ▾

c. [Save & Continue] [Cancel]

6. The "Household Members Associated with this Entry / Exit" table will have updated (with different Project Start Dates) and the "Household Members" box now lists all associated household members. Use the Household Members box to switch to the newly added household member(s) to complete their entry assessment.

Household Members Associated with this Entry / Exit

		Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
🔒	👤	(1) Test, Justin A	Yes	✏ 09/01/2022	✏	📋	📋			
🔒	👤	(108687) Test, Terri	No	✏ 09/19/2022	✏	📋	📋			

[Include Additional Household Members]   Showing 1-2 of 2

Entry Assessment

Household Members	Household Data Sharing 🔒
(1) Test, Justin A Age: 51 Veteran: Unknown	**Client:** (1) Test, Justin A [Add Household Data]
(108687) Test, Terri Age: 28 Veteran: Unknown	**HUD CoC & ESG Entry SO ES SH (2020-2021) - CoC** Entry Date: 09/01/2022 03:20:56 PM 🔒

7. Save & Exit once complete.

METHOD #2: SHELTERPOINT

1. Use **ClientPoint** to access the profile of the Head of Household who is already enrolled in the project. Access their Households tab and check if the "new" household member(s) is in the household.

    a. If not, use the **"Manage Household"** button to add them. Do so by using a Client Search to see if they have a profile in CMIS, and if not, create one now. Consult the ClientPoint Training PowerPoint for more guidance if needed (slides 21-24).

2. Update the client's Release of Information (ROI) by including the new household member(s).
    a. Select the pencil/edit icon to access the ROI.

    b. Click the **"Include Additional Household Members"** button.

c. Select the household member(s) who are being added to the project entry.

Include Additional Household Members

Household Members

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

☐ **(2) Two Parent Family**
- ☑ (14) Smith, Will
- ☑ (17) Pinkett-Smith, Jada
- ☑ (16) Smith, Jaden
- ☑ (15) Smith, Willow

d. Click the "Continue" button, followed by the "Save Release of Information" button.

3. Go to **ShelterPoint** and locate your Head of Household on your project's Unit List. Click on their name.

	09/07/2022	House - 2	Room 2 - Family	Bed 001		(14) Smith, Will	02/19/1982	Male	9	No	
	09/07/2022	House - 2	Room 2 - Family	Bed 002		(16) Smith, Jaden	06/28/1999	Male	9	No	
	09/07/2022	House - 2	Room 2 - Family	Bed 003		(15) Smith, Willow	07/15/2002	Female	9	No	

4. In the **Household Members** section of the check-in screen, click the "**Check In Additional Family Members**" button.

Unit Stay Entry Data

| Stay Data | Entry / Exit | Release of Information | Service Transactions |

Unit Entry Data - (14) Smith, Will

Date In*	09 / 07 / 2022 🗓🔄 🗓 9 ✔ : 04 ✔ : 50 ✔ AM ✔	Midnight Check In
Confirm for Next Day Stay?	No ✔	
Unit Name / Number	House - 2 / Room 2 - Family / Bed 001	Assign Unit
Supplies Given		
Locker number		
Codes/Notes		

| | | Change | Clear |

Apply Funds for Service

Funding Sources

| Source | | Amount |
| Add Funding Source | | Calculate | Total: $0.00 |

Incidents For (14) Smith, Will

| | Start Date | End Date | Incident | | Incident Code Provider | Ban | Site | Staff |
| Add New Incident | | | | No matches. | | | |

Household Sharing 🔒

| | | Add Household Data |

▼ **Household Members**

ⓘ Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.

(2) Two Parent Family | | | [Check In Additional Family Members]

☐ (14) Smith, Will	Room 2 - Family	Bed 001	Assign Unit
☐ (17) Pinkett-Smith, Jada			Assign Unit
☐ (16) Smith, Jaden	Room 2 - Family	Bed 002	Assign Unit
☐ (15) Smith, Willow	Room 2 - Family	Bed 003	Assign Unit

5. In the "**Check In Additional Household Members**" window:
   a. Change the "Date In" to the date/time that the client(s) joined the household in the program.
   b. Check off the name(s) of the clients moving in with the household.
   c. Select "Save & Exit".

6. In the **Household Members** section, assign the new household member a Unit.

6. Scroll to the bottom of the check-in screen and click "Save & Exit".

7. At this time, the newly added client(s) should be visible on the Unit List with a matching Group ID number to the rest of the household.

8. Click on the newly added client(s)' name to access their check-in screen. Complete their entry assessment. Click "Save & Exit" once complete.