

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.

Client - (1) Test, Justin A

Mass Visibility Update

(1) Test, Justin A

Release of Information: None

-Switch to Another Household Member- Submit

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

(25550) Male Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(1) Test, Justin A	51	Yes	Self	06/03/2021	0	1
(108687) Test, Terri	28	No	son	08/10/2022	2	1
(103388) Test, Thomas		No	son	08/10/2022	3	1

Manage 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.

Client Information | Service Transactions

Summary | Client Profile | Households | **ROI** | Entry / Exit | Case Managers | Case Plans

Release of Information

Provider	Permission	Start Date	End Date
Catholic Charities	Yes	09/01/2022	09/01/2025

Add Release of Information

Showing 1-1 of 1

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

Release of Information

Release of Information - (1) Test, Justin A

Household Members

No Household Members were originally associated.

Include Additional Household Members

Release of Information Data

Provider* Catholic Charities (45)

Release Granted Yes

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.

Client - (1) Test, Justin A

(1) Test, Justin A
Release of Information: None

-Switch to Another Household Member- Submit

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Catholic Charities - Casa San Francisco ES (9)	HUD	09/01/2022				

Add Entry / Exit

Showing 1-1 of 1

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.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* Catholic Charities - Casa San Francisco ES (9) v
Type* HUD
Update

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		09/01/2022						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Household Members: (1) Test, Justin A, Age: 51, Veteran: Unknown

Household Data Sharing: Client: (1) Test, Justin A, Add Household Data

HUD CoC & ESG Entry SO ES SH (2020-2021) - CoC

Entry Date: 09/01/2022 03:20:56 PM

5. In the "Edit Project Start Date" window:

- Select the household member(s) being added to the project entry.
- Change the Project Start Date to match when they joined the project.
- 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

- (1) Test, Justin A
Age: 51
Veteran: Unknown
- (108687) Test, Terri
Age: 28
Veteran: Unknown

Household Data Sharing

Client: (1) Test, Justin A Add Household Data

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.

Client - (14) Smith, Will

(14) Smith, Will
Release of Information: None

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

(2) Male Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(14) Smith, Will	40	Yes	Self	09/21/2022	0	1
(16) Smith, Jaden	23	No	son	09/21/2022	0	1
(15) Smith, Willow	20	No	daughter	09/21/2022	0	1

Manage Household

Previous Households

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.

Client Information | Service Transactions

Summary | Client Profile | Households | **ROI** | Entry / Exit | Case Managers | Case Plans | Assessments

Release of Information

Provider	Permission	Start Date	End Date
The Shepherd Place	Yes	09/02/2022	09/02/2025

Add Release of Information

Showing 1-1 of 1

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

Release of Information

Release of Information - (14) Smith, Will

Household Members

To update Household members for this Release of Information, click the box beside each name.

(2) Two Parent Family

- (14) Smith, Will
- (16) Smith, Jaden
- (15) Smith, Willow

Include Additional Household Members

Release of Information Data

Provider* The Shepherd Place (7) Search My Provider Clear

Release Granted Yes

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

Include Additional Household Members ✕

Household Members

i 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* Midnight Check In

Confirm for Next Day Stay?

Unit Name / Number 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

i 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

- (14) [Smith, Will](#) Room 2 - Family Bed 001 Assign Unit
- (17) [Pinkett-Smith, Jada](#) Room 2 - Family Bed 002 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.

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	
09/21/2022	House - 2	Room 2 - Family	Bed 004	(17) Pinkett-Smith, Jada	04/30/1983	Female	9	No	

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