

Suncoast Partnership

Step-by-Step: Creating Family

All clients must be in system before a household can be created. Please see how to how to search for and/or create new client before continuing with the below instructions.

1. Once the **head of household** has been created, navigate to the head of household's profile screen and click on the **manage** button on the right side of the screen in the Household Members selection

The screenshot shows the client profile for Betty Smith. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. The 'PROFILE' tab is active. On the right side, under the 'Household Members' section, a 'Manage' button is highlighted with a red box. The client profile details include:

Social Security Number	XXX - XX - 6795	
Quality of SSN	Full SSN Reported	
Last Name	Smith	
First Name	Betty	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	02/15/1968	Adult. Age: 54
Middle Name	None	
Gender	Female	
Race	White	
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x)	
Veteran Status	No	

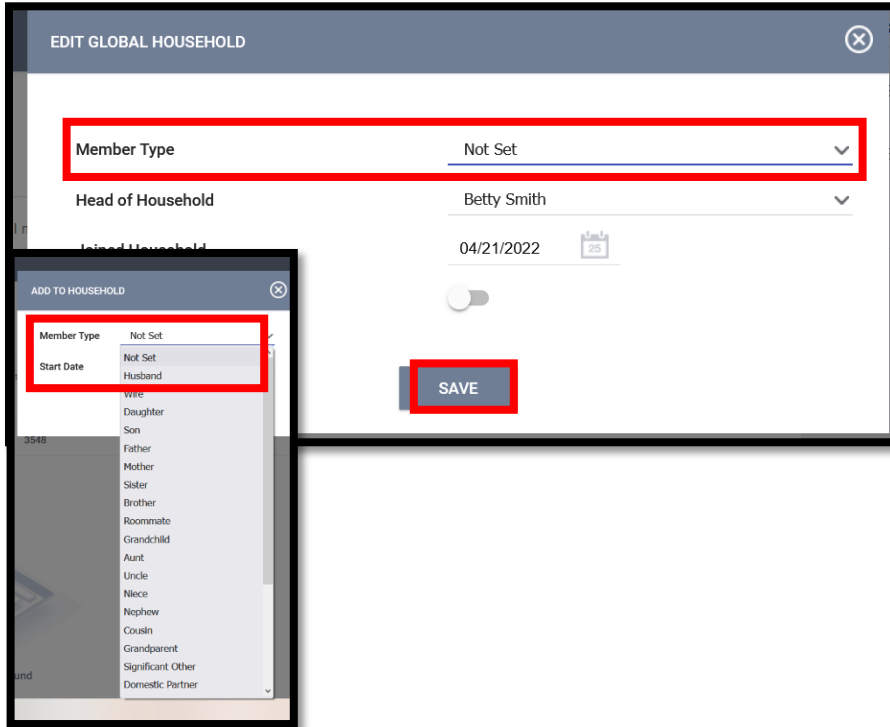
2. The Household Management screen will appear. On the left of the screen, you will see your recent search results. The family members who you recently created will be displayed there. Hover your mouse over the name of client you would like to add to the household and click on (+) at the end of their name to add.

If the client isn't in your recent searches, you can use the Search for Household Member section to find them. Hover your mouse over their name and click on (+) to add.

The screenshot shows the Household Management screen. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. The 'HOUSEHOLD MANAGEMENT' section is active. The 'Search for a Household Member' section is visible, with a search bar containing 'Betty Boo' and a 'SEARCH' button. Below the search bar, a table lists search results, with a red box highlighting the 'Add' button next to 'Betty Boo'. On the right side, under the 'Your recent client searches accessed' section, a red box highlights the '+' button next to 'Amy Barth'.

Client	Date of Birth	Last Four SSN	Last Updated
+ Add Betty Boo	01/01/1960	3548	04/18/2022

3. Select their member type from the drop-down screen. The client's member type is their relationship to the head of household. Click **SAVE**.



The screenshot shows the 'EDIT GLOBAL HOUSEHOLD' form. The 'Member Type' dropdown is highlighted with a red box and is currently set to 'Not Set'. Below it, the 'Head of Household' is listed as 'Betty Smith'. The 'Join Household' date is '04/21/2022'. A 'SAVE' button is also highlighted with a red box. An inset window titled 'ADD TO HOUSEHOLD' shows the 'Member Type' dropdown menu open, listing various relationship options such as 'Not Set', 'Husband', 'Wife', 'Daughter', 'Son', 'Father', 'Mother', 'Sister', 'Brother', 'Roommate', 'Grandchild', 'Aunt', 'Uncle', 'Niece', 'Nephew', 'Cousin', 'Grandparent', 'Significant Other', and 'Domestic Partner'. The 'Member Type' dropdown in the inset is also highlighted with a red box.

4. You will select the member type of all the members of the household except the head of household.
5. You do not need to set a member type for head of household. The star next to their names indicates them as head of household.