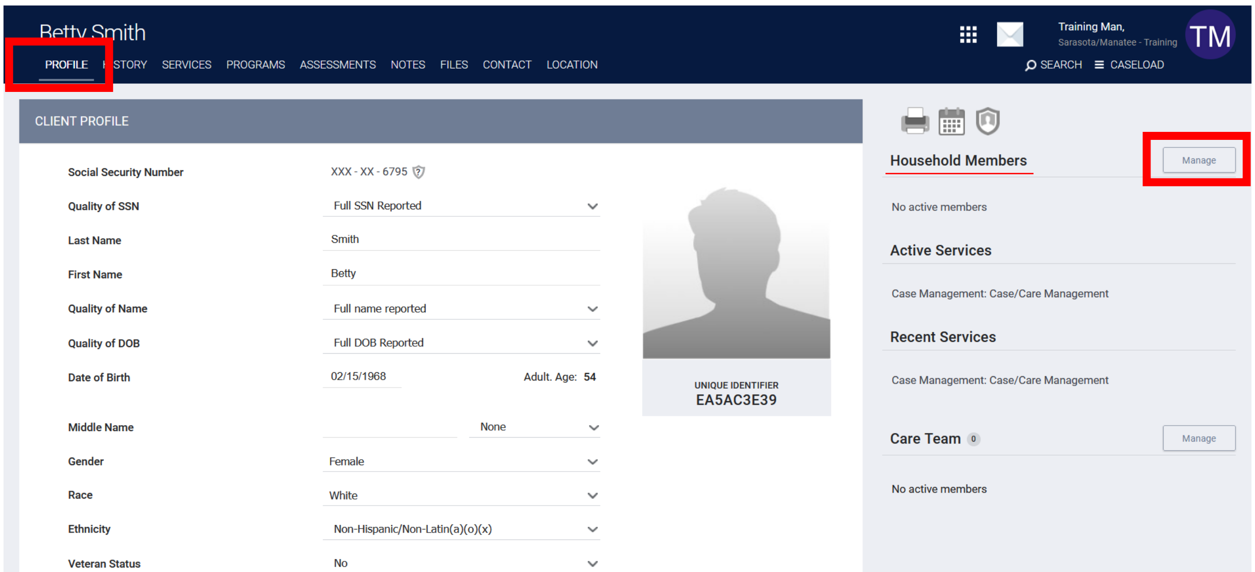
Suncoast Partnership

Step-by-Step: Creating Family

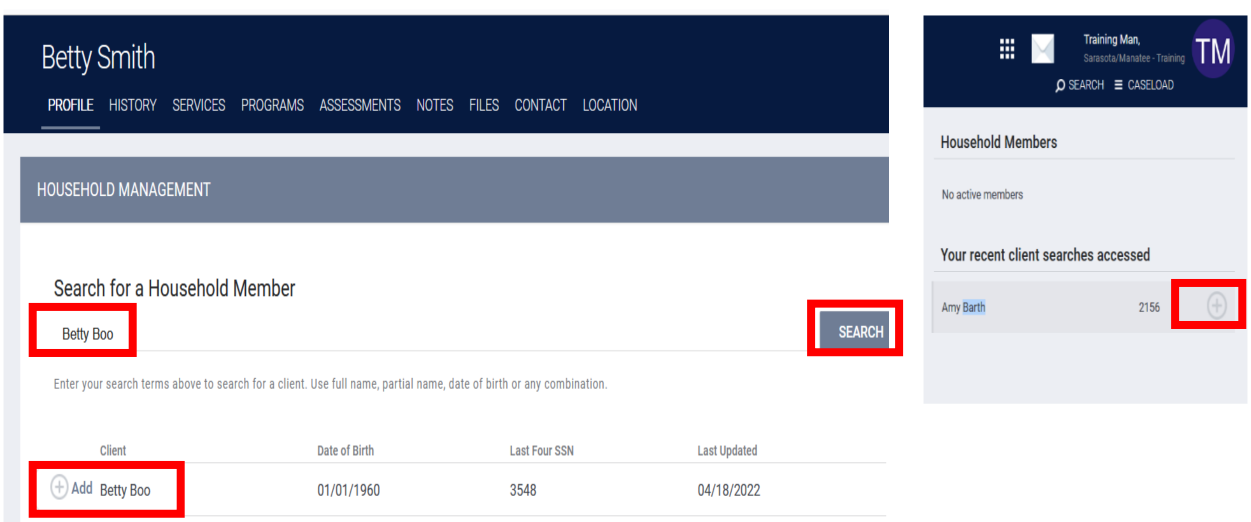
All clients must be in system before a household can be created. Please see how to how to search for and/or create new client before continuing with the below instructions.

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

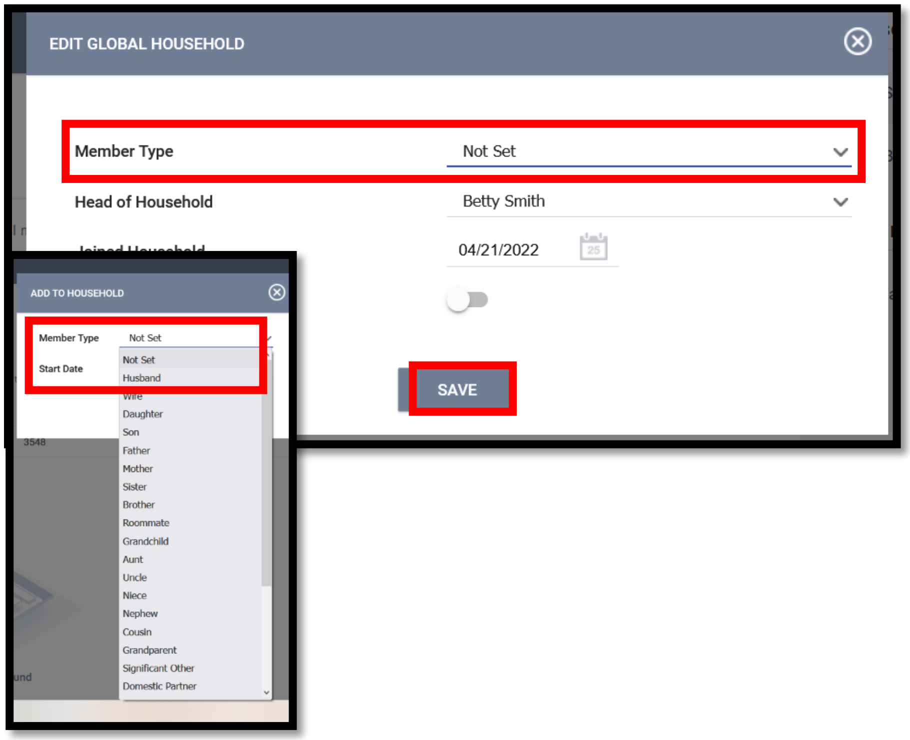


2. The Household Management screen will appear. On the left of the screen, you will see your recent search results. The family members who you recently created will be displayed there. Hover your mouse over the name of client you would like to add to the household and click on ⊕ at the end of their name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



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.**



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.