Adding new babies or household members (non-HPRP programs)

When a baby is born, or a new member enters a household while the rest of the household is already being served, he/she needs to be added to the existing household and connected to the program entry and services. Please use this sheet to make sure that you have correct data entry and accurate reports.

Step 1: Add the new member or baby to the household

1. Go to the "households overview" box in the head of household's record.
2. Click on the pencil to the left of the household type. A pop-up window will open.
3. Complete the pop-up with information about the new person as usual:
   - *Head of household:* this is preset to "no."
   - *Relationship to head of household:* select the best option.
   - *Date entered:* Change to the **baby's birthdate** or the **date the new member joined the household**.
   - Additional profile and demographic information (name, SSN, SSN data quality, date of birth, DOB data quality, gender, race, ethnicity)
4. Click "add client with this information."
5. Click "exit and refresh."

Step 2: Connect the new member or baby to the household's entry/exit

1. Make sure you are in the head of household's record.
2. Click on the orange entry/exit box in the top right corner. A pop-up window will open.
3. Click on the pencil next to the "entry date" field to open the entry information.
4. In the overview section at the top, you will see a drop-down menu. Select the new person's name.
5. Change the new person's **entry date** to their **household entry date** in the box next to their name.
6. Click "add related entry/exit." The new person will now be connected to the rest of the household in the entry/exit section.
7. Click "save and close."

Step 3: Answer assessment questions in the new member or baby's record

1. Go into the new person's record. To do this, click on his/her name in the Households Overview box at the top of the screen.
2. Click on the "Assessments" tab. Go to your funder-specific assessment.
3. **Backdate** the assessment to the **new person's household entry date**. Enter the date and click the "back date" button. Click "OK" when the pop-up appears. You should see a yellow bar at the top of the screen.
4. Answer the first two questions: *Housing Status* and *Does Client Have a Disability of Long Duration*.
5. Answer any remaining questions required by your funding source, such as income, non-cash benefits, specific disabilities, veteran information, or domestic violence information.
6. Click "save" at the top or bottom of the assessment.
7. Click the "return to live mode" button.

Step 4: Connect the new member or baby to the household's service transactions

1. Go back into the head of household's record. To do this, click on his/her name in the "Households Overview" box at the top of the screen.
2. Click on the "Service Transactions" tab. Under "display options," make sure you have selected "display services."
3. Click the pencil to the left of a service transaction that does not already have an end date. Put in an end date that is one day **before** the new baby or household member joined the household.
4. Save and repeat for all other service transactions that do not have an end date.
5. Use the "multiple services" button to re-record services that the household still receives. Change the start date to the **day the new member or baby joined the household.** Make sure to check off the boxes next to all household members' names, including the new person. Don't forget to save!