

HPRP Special Cases: Adding new babies or household members

When a baby is born, or a new member enters a household, he/she needs to be added to the existing household and connected to the program entry and services. For HPRP, this process is slightly different. Most importantly:

- If the new person was born or entered the household and **the household type switched from being a single person to a household with more than one person**, complete part “A” special instructions in each step below.
- If the new person was born or entered **into a household with more than one member and in the same quarterly reporting period that the household entered the program**, complete the part “B” special instructions in each step below.
- If the new person was born or entered later, **into a household with more than one member and in a quarterly reporting period later than when the rest of the household entered**, complete the part “C” special instructions in each step below.

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. For **household entry date**, follow these guidelines:
 - A. If the new person was born or entered and **the household type switched from being a single person to a household with more than one person**, their household entry date should be the **same** as the rest of the household members. *NOTE: This might cause a baby’s household entry date to be before his/her date of birth. This is necessary for accurate reporting.*
 - B. If the new person was born or entered **into a household with more than one member and in the same quarterly reporting period that the household entered the program**, their household entry date should be the **same** as the rest of the household members. *NOTE: This might cause a baby’s household entry date to be before his/her date of birth. This is necessary for accurate reporting.*
 - C. If the new person was born or entered later, **into a household with more than one member and in a quarterly reporting period later than when the rest of the household entered**, their household entry date should be the **first date of the quarter they were born or entered in**. *NOTE: This might cause a baby’s household entry date to be before his/her date of birth. This is necessary for accurate reporting.*

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** in the box next to their name. Use the same date you chose as their household entry date:

- A. If the new person was born or entered and ***the household type switched from being a single person to a household with more than one person***, their household entry date should be the **same** as the rest of the household members. *NOTE: This might cause a baby's program entry date to be before his/her date of birth. This is necessary for accurate reporting.*
 - B. If the new person was born or entered ***into a household with more than one member and in the same quarterly reporting period that the household entered the program***, their household entry date should be the **same** as the rest of the household members. *NOTE: This might cause a baby's program entry date to be before his/her date of birth. This is necessary for accurate reporting.*
 - C. If the new person was born or entered later, ***into a household with more than one member and in a quarterly reporting period later than when the rest of the household entered***, their household entry date should be the **first day of the quarter they were born or entered in**. *NOTE: This might cause a baby's program entry date to be before his/her date of birth. This is necessary for accurate reporting.*
6. Click "add related entry/exit." The new person will now be connected to the rest of the household in the entry/exit section.

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.
2. Click on the "Assessments" tab. Go to your funder-specific assessment. **Backdate** the assessment to the new person's **program 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.
3. Answer the first two questions: *Housing Status* and *Does Client Have a Disability of Long Duration*.
4. Answer any remaining questions required for the new person under HPRP, such as income, non-cash benefits, veteran information, or domestic violence information.
5. Click "save" at the top or bottom of the assessment.
6. Click the "return to live mode" button.

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

- A. If the new person was born or entered and ***the household type switched from being a single person to a household with more than one person***.
 1. Go into the head of household's record. Go into "Service Transactions". Under "display options," make sure you have selected "display services."
 2. a. **DELETE** any existing service transactions for the head of household.
b. Repeat step 2 for **all other household members**. To easily switch between household members, click on their names in the "households overview" box.
 3. When the service transactions have been deleted for **all** household members, return to the head of household's record.Use the "multiple services" button to re-record all services. Be sure to check the boxes next to all household members' names, including the person. Don't forget to save! *NOTE: This may cause a baby's service start date to be before his/her date of birth. This is necessary for accurate reporting.*

- B. If the new person was born or entered ***into a household with more than one member and in the same quarterly reporting period that the household entered the program***:

4. Go into the head of household's record. Go into "Service Transactions". Under "display options," make sure you have selected "display services."
5. a. **DELETE** any existing service transactions for the head of household.
b. Repeat step 2 for **all other household members**. To easily switch between household members, click on their names in the "households overview" box.
6. When the service transactions have been deleted for **all** household members, return to the head of household's record.
7. Use the "multiple services" button to re-record all services. Be sure to check the boxes next to all household members' names, including the person. Don't forget to save! *NOTE: This may cause a baby's service start date to be before his/her date of birth. This is necessary for accurate reporting.*

C. If the new person was born or entered later, **into a household with more than one member and in a quarterly reporting period later than when the rest of the household entered:**

1. Go into the head of household's record. Go into "Service Transactions." Under "display options," make sure you have selected "display services."
2. For all **open** service transactions (those without an end date), click on the edit pencil to add an end date. The end date should be the last day of the quarter ending **just prior** to the new person's birth or entry date.
3. Use the "multiple services" button to start a brand-new service transaction for the entire family (including the new person) that begins on the **first day of the quarter the person was born or entered in**. *NOTE: This might cause a baby's service start date to be before his/her date of birth. This is necessary for accurate reporting.*
4. Repeat this process for additional **open** service transactions as necessary.
5. For **already closed** service transactions that should include the new person (such as a rent payment that falls within the month of the new person's birth or entry date), follow steps 1-5 in part A.

NOTE: Remember that all service start dates must be on or after program entry dates for accurate reporting. Please check to make sure your service start dates are correct.