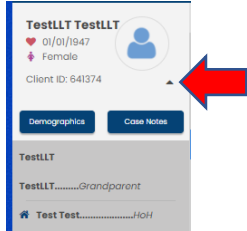Adding a client to a family and adding them to the enrollment

1. If the member is not listed with the family, then you need to add this person to the family first and then you can add them to the enrollment and create the assessments.
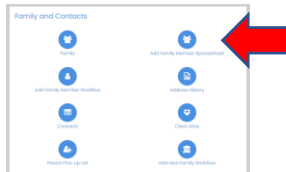2. In the example below, the child record is missing from the family and the enrollment

3. You first need to add the child to the family. You can do this from the dashboard or left side menu.
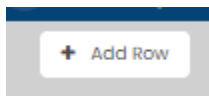4. From the Dashboard:
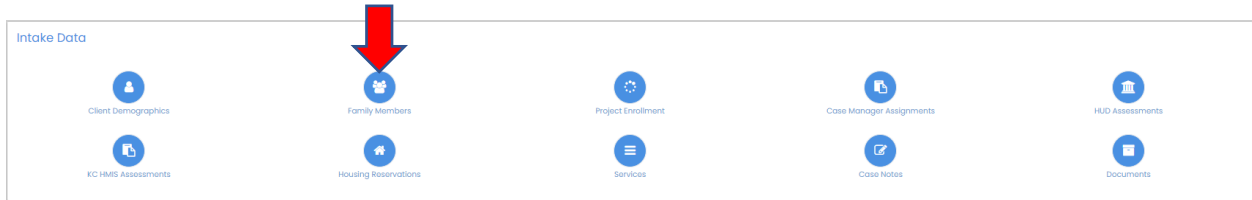
5. Or from the left side menu – Case Management>Family and Contacts
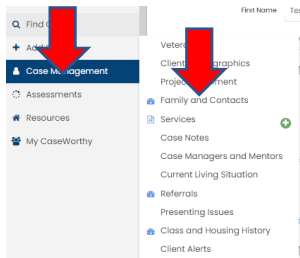
6. Click the icon 'Add Family Member Spreadsheet'

7. Click 'Add Row'

8. Complete the form, but firs enter the first and last name and then check for duplicates. If the system finds the client then select them and update/edit the data as needed.

9. This will add the member to the family

| Last Name *	First Name *	❓ Dupe Check *	Birth Date *
✔ Test	Test		10/3/1972
✔ TestLLT	TestLLT		1/1/1947
✔ test3	test3		10/1/2012

10. You will now also see them in the family member list on the left side drop down

You can now follow the steps on how to add this new family member to the enrollment as shown below:
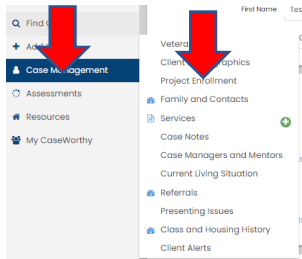
Adding a family member to an enrollment:

1. First, the family member has to be part of the family. This means that when you click the drop down in the left side to open the family list, the client is showing in that list.
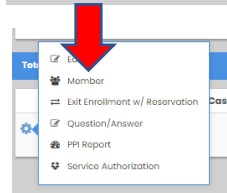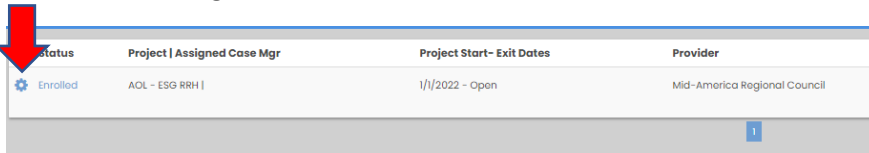

2. In this case, if you just need to add the member to the enrollment, then you just need to click on the project enrollment icon in the dashboard or select case management from the left side menu and then select project enrollment.
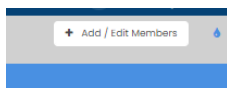3. From the Dashboard:
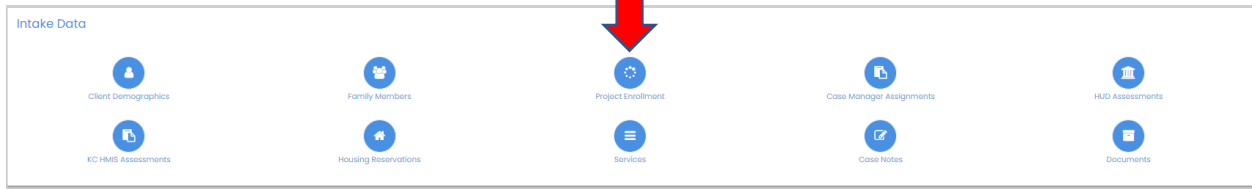
4. Or from the left side menu – Case Management>Project Enrollment

5. Click the gear and select Member

| Status | Project | Assigned Case Mgr | Project Start- Exit Dates | Provider |
|---|---|---|---|
| ⚙ Enrolled | AOL - ESG RRH | | 1/1/2022 - Open | Mid-America Regional Council |

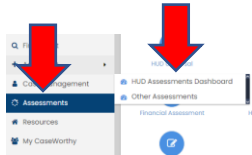
6. Click on 'add/edit members' in the top right

7. Click on the check mark nest to the family member's name and provide the date the member joined the household.
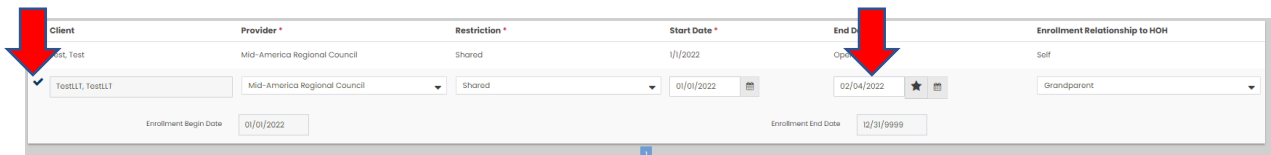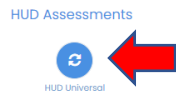

8. Once you have added the member to the enrollment you will need to manually create the entry assessments.

9. From the dashboard or from the left side menu you can select HUD Assessments
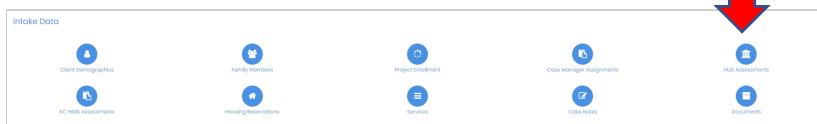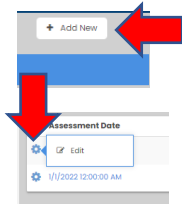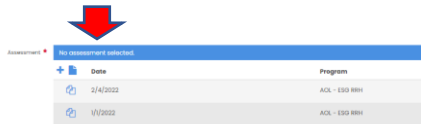
10. You can then click on the HUD Universal Assessment and create the entry assessment

11. In the top right click Add New

12. Click on the words 'No Assessment Selected'

13. Complete the form, make sure to edit the date if needed and then save

14. You can then complete the from