To Add or Remove a Family Member

Updated on February 2017

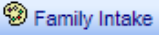**Home > Client Management (Search Client) > Intake > Update > Family Intake**

Business Purpose:

Clients who are not individuals must be intake as a family into SMIS. The Head of the family must be intake first, followed by "adding" the other family members, which are either Dependents or a Spouse/Partner.

Similarly, the same members when they leave the family, must be "removed" from the family using the same Family Intake screen BEFORE he/she is discharged individually.

How to Intake a Family Member:

1. Be sure you are on the Intake screen for the Head of the family. Click on the **Family Intake** action button.

2. In the **Spouse/Dependant(s)** tab, click on the **Add Dependant** button followed by entering the first 2-4 characters of the member's last name and first name and then click the button to search to see if the member already exists as a client in SMIS. A search results window will pop-up. If the member does not already exist in SMIS, then click the Add New Client **Action**. Else select the Add Existing **Action** of the existing member from the list shown.

3. Enter or confirm the member's Last Name*, First Name*, DOB* (Date Of Birth), Gender*, any Alias(es) and the Relationship* to the head of the family.

4. Add additional members if needed.

5. Click **Save** to save the member(s) record.

How to Remove a Family Member:

1. Be sure you are on the Intake screen for the Head of the family. Click on the **Family Intake** action button.

2. In the **Spouse/Dependant(s)** tab, select the dependent(s) to be removed by first clicking the checkbox to the left of the record of the member(s). Then, click on the **Remove Dependant** button.

3. Click to save the removal.

Important Notes:

1. Adding a family member will create an intake for him/her that will inherit some of the intake field values from the head of the family. If these values need to be changed or other fields filled in, you can update the intake of the new member afterwards.

2. If the family has already been admitted, then adding a family member will create both an intake and an admission for him/her. Also, some of the admission field values will be inherited from the head of the family, including the Assign Room* for the family. If these values need to be changed or other fields filled in, you can update the admission of the new member afterwards.