To View Family History

Updated on February 2017

Home > Client Management (Search Client) > Intake > View/Update > Family Intake > History

Business Purpose:

To view the history of additions and removals of members to a family.

How to view Family Member History:

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

2. Click the History action button to view family members' history, including those of the head of the family.

Important Notes:

1. Family members can be added during the family intake process, as well as afterwards, even after the initial family has been admitted.

2. Family members can be removed before or after the family admission. However, if a member is removed after the family is admitted, he/she must also be discharged individually through his/her respective Discharge screen from their Client navigator.