

To View Family History

Updated on November 2023

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.

The Family Members information includes Last Name, First Name, Date of Birth, Gender, Also Known As, Relationship, Join Date and Left Date.

How to view Family Member History:

1. Click on the History button. A new pop-up window will display a family history record.

Client Management - Family Intake History							
Close							į
Family Members							
Last Name	First Name	Date of Birth	Gender	Also Known As	Relationship	Join Date	Left Date
Gin	Gin	1995/09/09	Male		Spouse/Partner	2023/10/03 12:57:08 PM	
Maria	Anna	1996/09/09	Female	Anna	Family Head	2023/10/03 12:57:08 PM	
Gin	bob	2015/09/09	Male		Dependant	2023/10/03 01:24:40 PM	
Gin	Dora	2022/09/09	Female		Dependant	2023/10/03 02:35:23 PM	
Gin	Jone	2023/09/09	Male		Dependant	2023/10/03 03:29:47 PM	
5 items found, displaying a	all items.						

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.