To Add or Remove a Family Member

Updated on October 2023

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.

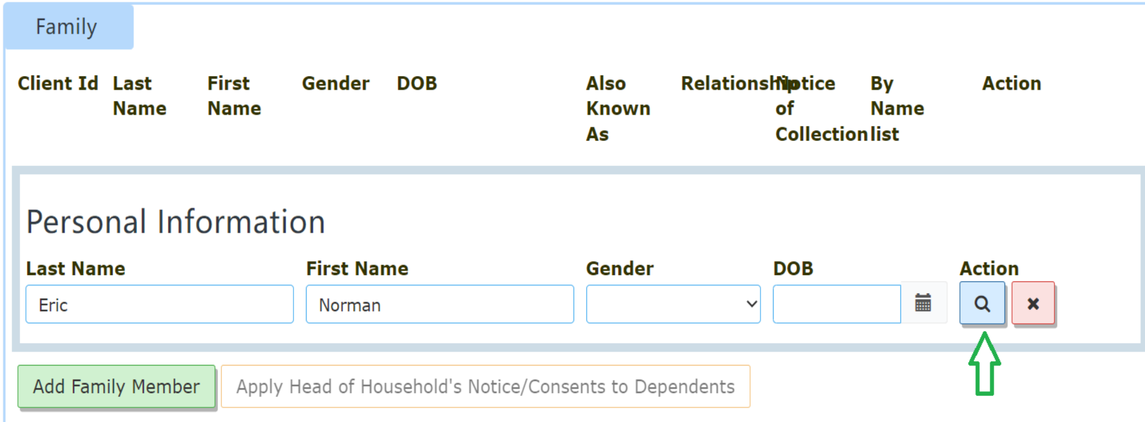
How to Intake a Family Member:

1. Be sure you are on the Intake screen for the Head of the family.

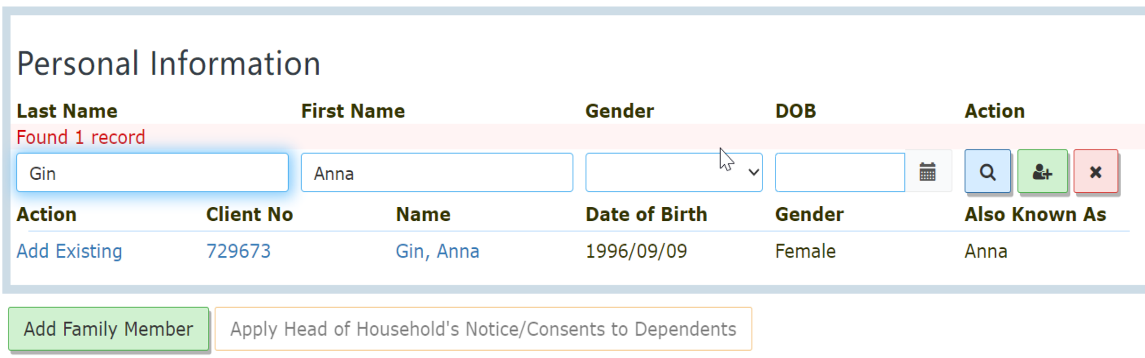
2. Enter all necessary information in the following sections of the Intake process:
   Bed program (ACC: *Room*): *Notice of collection, Personal Information, Living Situation, Length of Homelessness, Family, BNL Consent* (can be signed only after the intake saved), *Client Details, Support Needs, Income, Identification and Contact Information*.
   Service Program: *Intake Program, Notice of Collection, Personal Information, Living Situation, Length of Homelessness, Central intake Call Details* (this section is available only in the Central Intake program), *Family, Support Needs*
   Whenever available, use the drop-down arrow next to the field for selection.

3. **Family** section:

   a. There is an option to add and remove family members. To add a new family member, click on the Add Family Member button, fill in the Last name and First name fields and click on the search button.

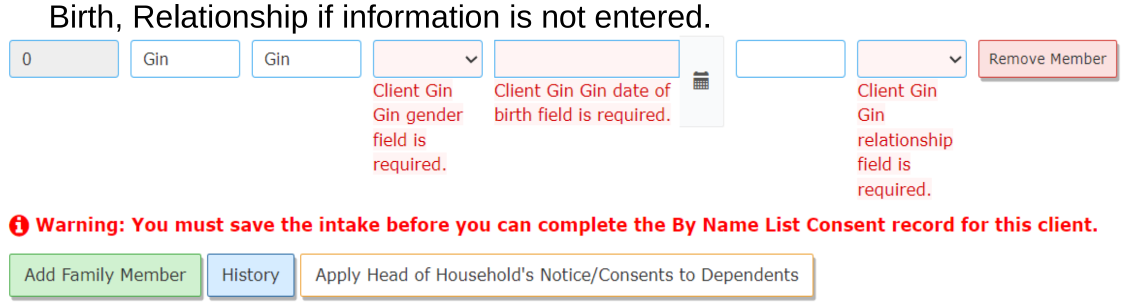


b. If this is an existing client, click on the Add Existing link.

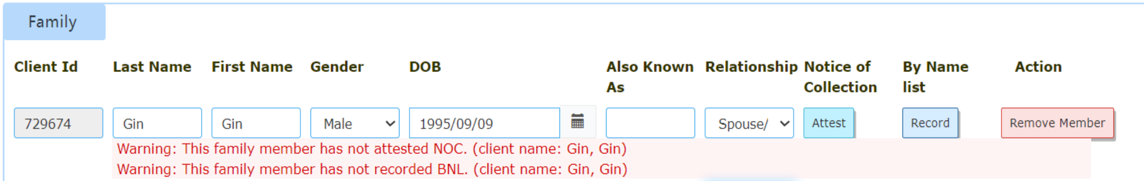


c. If this is a new client, click on the icon. Then click on the "Save".

d. The error messages will be displayed for the following fields: Gender, Date of Birth, Relationship if information is not entered.

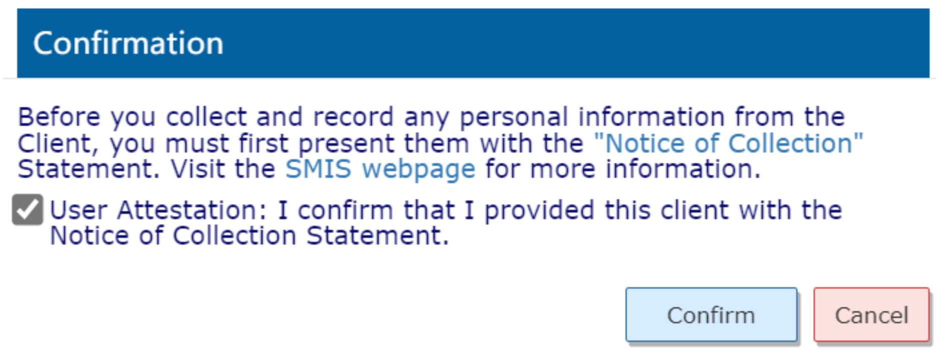


e. Enter all mandatory information and save. The following warning messages should be displayed:

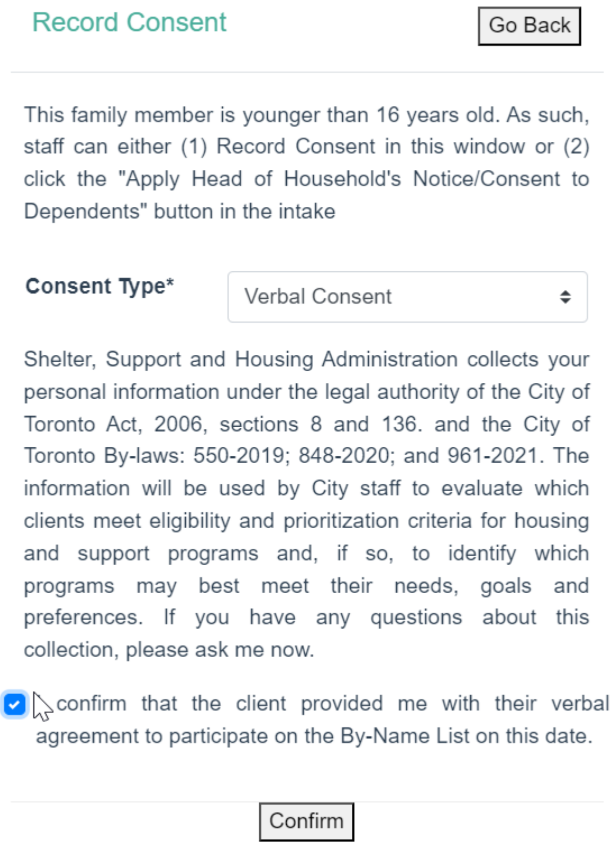


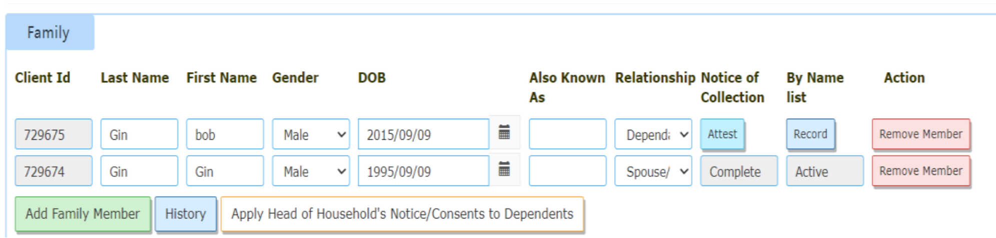
f. You can click on Attest and Record buttons.

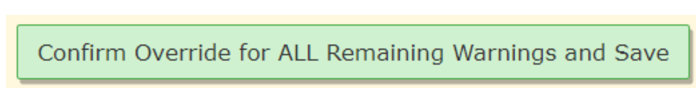
- Clicking on Attest button will open a Confirmation pop-up window.
  - Clicking on Confirm button will close the pop-up window and NOC status will move to 'Complete'.



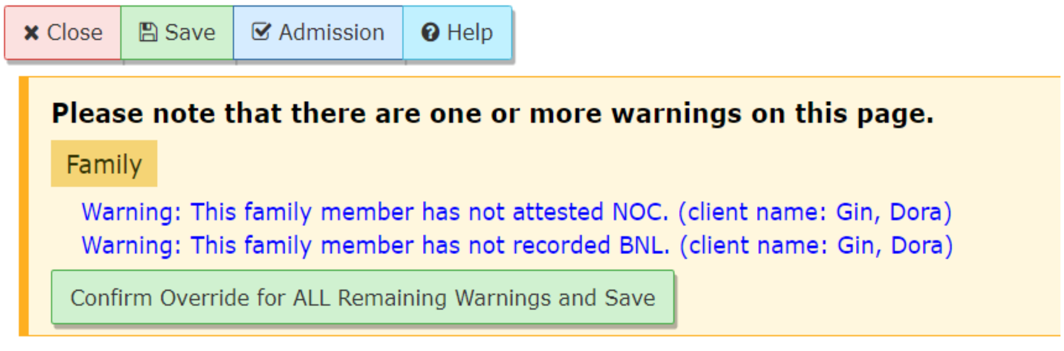
- Clicking on Record button will open a Confirmation pop-up window.
  - Clicking on Confirm button will close the pop-up window and BNL status will move to 'Active'.



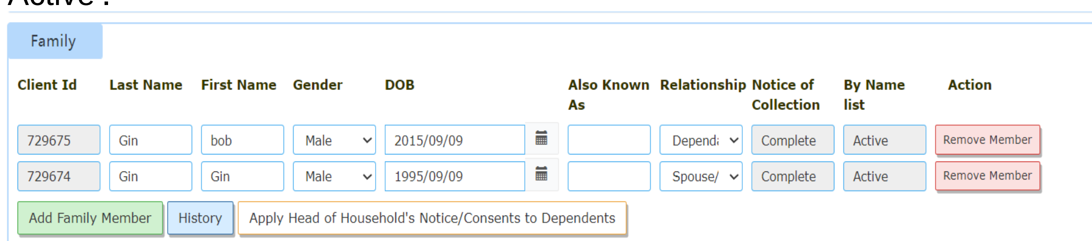


g. You can click on the 

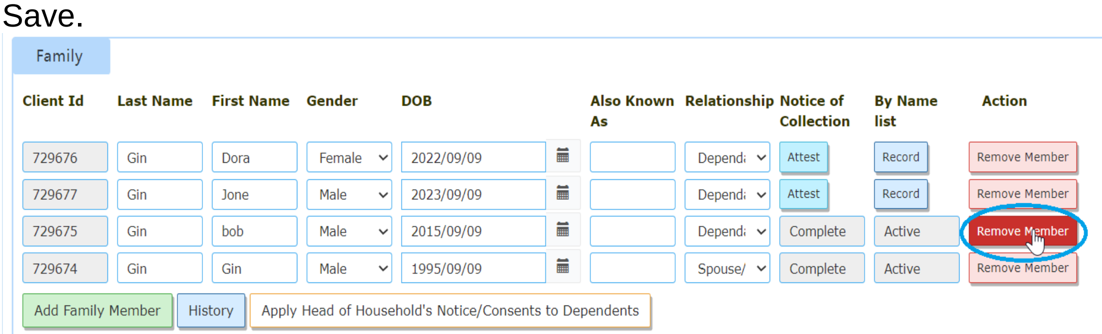
green button. The Dependant data information will be saved but Attest and Record buttons will remain active.



h. If a family member is a dependant, clicking on the Apply Head of Household's Notice/Consents to Dependents button will save **Notice of the Collection** and **By Name list** and change the values to 'Complete' and 'Active'.



i. To remove a family member, click of the Remove Member button and then click Save.



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

Client Management - Family Intake History

Close

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 all items.

4. Add additional members if needed.

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

Important Notes:

1. Family section information should be available in Bed programs (with ACC = Rooms) and Service Programs.

2. 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.

3. 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.

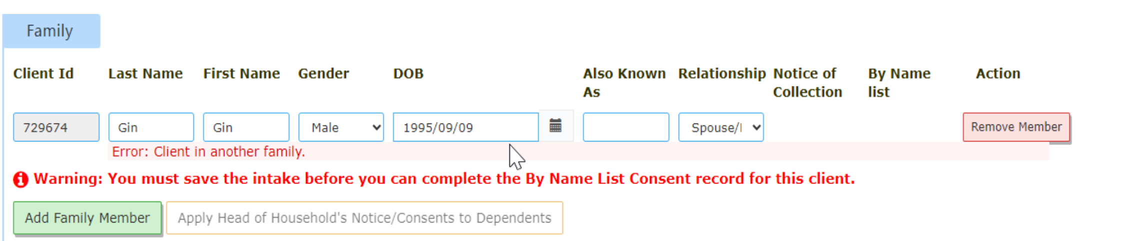
4. If selected client member is already in another family and save button is clicked, a message is displayed at the top of the intake screen"

Please note that there are one or more errors on this page. You will not to be able to save this page until these errors are corrected.

Family

Error: Client in another family.

At the same time the error message appears in the Family tab:



5. If the user did not click on the search icon and instead clicked on the Save button, the following error message will be displayed: