



HOW TO REMOVE MEMBERS OF AN EXISTING FAMILY UNIT

1. From the Front Desk menu, select Clients. Go to the Family Head of the household of which you are altering. If you are unsure of the family head – Go to Step three and click on the name of the client with the 'Family Head' Role
2. From the Client - Vitals page, click the Client Information drop-down list and select Family.
3. On the Client - Family page, find the member you'd like to remove from the Family Unit and click the Delete button on the right.

Client - Family

Family History

Showing 1 to 2 of 2 entries | Show 10 entries

Filter items

Status	Full Name	Date of Birth	Role	Relationship	Action
2023-08-09 - Present	[REDACTED]	1999-12-27	Family Head	n/a	
2023-08-09 - Present	[REDACTED]	2009-01-01	Dependant - Child	Sister	

1

+ Add Member

+ Create and Add Member

Delete the item?



Are you sure you want to delete this record?

Close

Delete

4. A pop-up will appear asking if you are sure you want to delete this record. Select Delete.

5. A green notification will appear on the top right

Item Deleted Successfully

6. The Family Member is now removed, from both the Family Head client and the removed client, and will not show up in either of their Family Units.