HT11: HOW TO ADD / JOIN MEMBERS TO AN EXISTING FAMILY UNIT

The instructions below include two different way you can add members to an existing family unit.

ADD MEMBER TO FAMILY

1. From the Front Desk menu, select Clients.

2. On the Client List page, select the Client record of one of the clients that will be part of the new family unit by clicking the name of the client.

3. From the Client - Vitals page, click the Client Information drop-down list and select Family.

4. On the Client - Family page, click the Add Member button.

5. From the Add Member page, type to search for an existing client in the Family Member Name field then select the client from the search results.

   If the client is not already in the HIFIS database, click the Close button and click the Create and Add Member button instead. Fill in the mandatory fields in the Create and Add Member page, then click the Save button

6. Select their family role and their relationship to the family head.

7. Confirm the start date of the relationship and, if applicable, the end date.

8. Click the Save button.

9. To add additional family members, repeat steps 4 through 8.

JOIN MEMBER TO FAMILY

1. From the Front Desk menu, select Clients.

2. On the Client List page, select the Client record of one of the clients that will be part of the new family unit by clicking the name of the client.

3. From the Client - Vitals page, click the Client Information drop-down list and select Family.

4. On the Client - Family page, click the Join a Family button.

5. In the Search field, type the name of the family head of the family unit to which you want to join this client and select the Search button.

6. From the search results, select the Join a Family button to join the client to the appropriate family.

7. On the Family Member Details page, select the client's family role and their relationship to the family head.

8. Confirm the start date of the relationship and, if applicable, the end date.

9. Click the Save button.