

Managing Households

Clarity System Basics

How to create a new household

Households are crucial in delivering effective services by ensuring all family or group members are accounted for. This is particularly important when services are delivered at the household level, such as in housing support.



New household steps

1 Navigate to Household Members section

To start a new household, search for one household member's client record and open it. From the client's profile, select *Manage* in the Household Member's section.

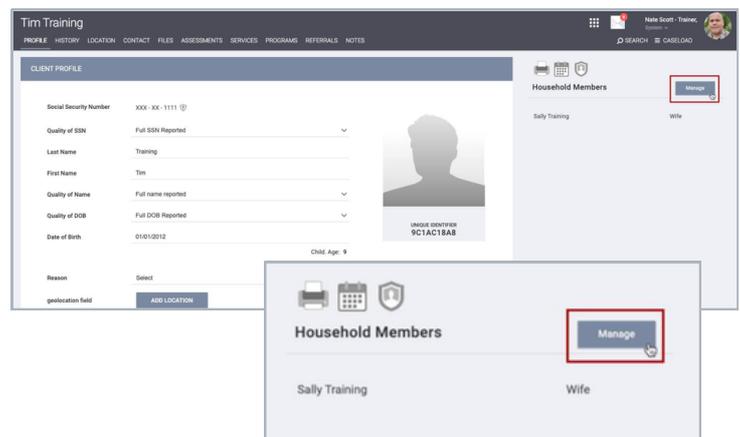
When do you need to create a household?

- ✓ Clients **entering a program alone** are considered part of a one-person household. No action needs to happen in Clarity to put them in a household.
- ✓ If a client is **not alone**, household members should be added, and a household must be created to contain all household members.

2 Searching and adding members

Client Search function allows you to search the entire client database for a matching family member to join your client's Family/Household group.

- Enter the client's name in the search bar.
- Hover over a household member's name to reveal **Add** when creating a new household.
- Hover over a household member's name to reveal **Join** when adding the client to an existing household.



Pro Tip

- ⓘ You can hover over the household member name in the household member section to make changes.

Note: This guide covers the essentials of the Clarity System Basics Training. We recommend reviewing the training course for a complete overview.