# PURPOSE

This instruction aid covers changing Household Members association to a Primary Client’s household.

The changes that may need to be handled are:

* Make Household Member the Primary Client (of the Household)
* Split Household Member from the household
* Add Household Member to the household
* Link Household Member from another household

# AUDIENCE

Agency employees and volunteers who record client visits to a food pantry and who maintain or update client information

# PREREQUISITES

1. Log In & Password Reset
2. Search Client Record

(C) Client Data Exceptions  
(G) New Client Entry-New TEFAP OR (H) new Client Entry-New Client

# INSTRUCTION STEPS

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|  |
| (B) Search client record |
| 1. Select Household Member |
| 2a. Edit Basic Information |
| 2b. Switch to Client’s Full Profile |
| 2c. Promote to Head of Household |
| 2d. Remove from Household |

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| **RULE: You must select the Primary Client record first before changing a Household Member’s association** | |
| 1. **Select Household Member** | |
| 1. Scroll down to Household Members |  |
| 1. Identify the desired Household Member |  |
| **HINT: There are four actions available:**   * **Edit Basic Information** * **Switch to Full Profile** * **Promote to Head of Household** * **Remove from Household** |  |

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| **2a. Edit Basic Information** | |
| 1. Select and click on the Pen icon |  |
| 1. Edit Last Name and/or First Name in Household Member info |  |
| 1. Edit Date of Birth using format MM/DD/YYYY or MM-DD-YYYY |  |
| 1. Edit Gender by selecting one value from list of choices |  |
| 1. Edit Relationship by selecting one value from list of choices |  |
| 1. Scroll down to “Ethnicity”. Edit by clicking on the appropriate values from the list of choices |  |
| 1. Scroll down to “Self-Identifies As”. Edit by clicking on the appropriate values from the list of choices |  |
| 1. Scroll to the bottom of the screen and click “Save Changes” |  |
| **Edit Basic Information Complete** | |

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| **2b. Switch to Client’s Full Profile** | |
| **HINT: Select this option to provide Services for a CSFP-eligible client that is a Household Member** |  |
| **HINT: Select this option to update a Household Member’s Personal or Monthly Income information** |  |
| 1. Select and click on the Switch icon |  |
| **Proceed to (D) Record Service Visit or TOPIC: (H) New Client Entry** | |

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| **2c. Promote to Head of Household** | |
| 1. Select and click on the Up-Arrow icon |  |
| 1. A “Promote Household Member” warning message will appear. |  |
| 1. If you are sure you want to proceed, click “Apply”. |  |
| 1. A “Success” message will appear confirming the person has been promoted to Primary Client |  |
| **Proceed to TOPIC: (C) Client Data Exceptions** | |

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| **2d. Remove from Household** | |
| 1. Select and click on the Trash Can icon |  |
| 1. A “Remove Member from Household” warning message will appear. |  |
| 1. If you are sure you want to proceed, click “Remove from Household”. |  |
| 1. A “Success” message will appear confirming the person has been removed from the Household |  |
| 1. Click “Save Changes” |  |
| **Remove from Household Complete**  **Proceed to (C) Client Data Exceptions (for person removed from Household)** | |