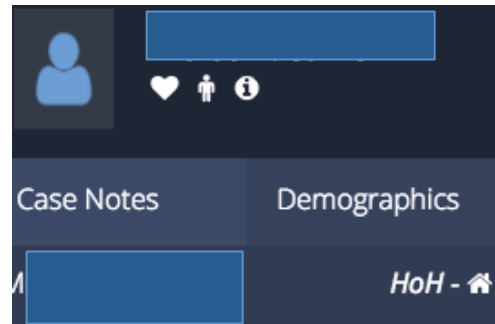
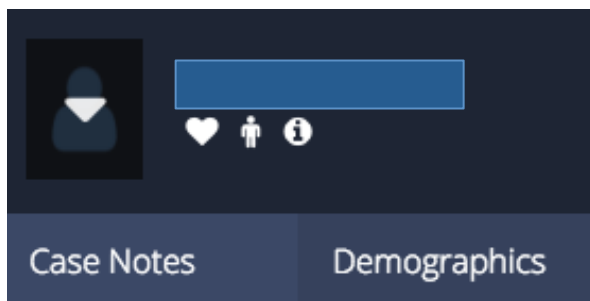




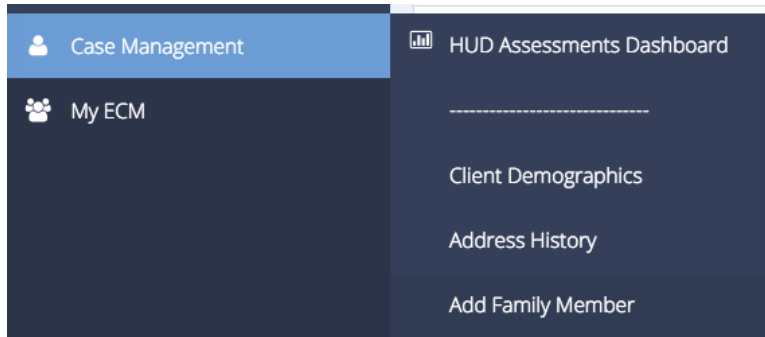
**WHAT TO DO AFTER A WORKFLOW ERROR...**  
**STEP 1: ADD ALL FAMILY MEMBERS TO HOUSEHOLD**  
**STEP 2: ADD ALL MEMBERS TO PROGRAM ENROLLMENT**

**STEP 1: ADD ALL FAMILY MEMBERS TO HOUSEHOLD**

**FIRST go to the HEAD OF HOUSEHOLD. IN THE UPPER LEFT CORNER CLICK THE BLUE PERSON ICON.**



**GO TO CASE MANAGEMENT > ADD FAMILY MEMBER**



**IN THE UPPER RIGHT USE THE ADD FAMILY MEMBER BUTTON.**

**CLICK THIS BUTTON MORE IF YOU NEED TO ADD MORE THAN (1) FAMILY MEMBER UNTIL YOU HAVE ENOUGH EMPTY FORMS TO FILL OUT.**



**FILL OUT THE FORM FOR EACH FAMILY MEMBER, REMEMBER TO CHECK FOR DUPLICATES!**

Form fields for adding a family member:

- Dupe Check** (with "Check For Duplicates" button)
- Last Name \***, **First Name \***
- Birth Date \*** (Full)
- Gender \***
- Age**
- SSN** (Full)
- Ethnicity \***, **Citizenship Status**, **Primary Language** (English)
- Relation to HDH \***, **Race \*** (Choose Options...)
- Is Dependent**
- Address** (with search icon)
- Sharing** (Shared)

**HIT SAVE WHEN DONE WITH ALL FAMILY MEMBERS.**

## **STEP 2: ADD ALL MEMBERS TO PROGRAM ENROLLMENT**

**go to CASE MANAGEMENT > PROGRAM ENROLLMENT then click on the GEAR > MEMBER**

Case Management interface showing a dropdown menu for 'Member' with options: Member, Treatment / Service Plan, View Services, View Case Notes, View Checklist, Delete.

Status	Program   Assigned Case Mgr
Enrolled	Family Promise ESG RRH

**then click on + ADD/EDIT MEMBERS**

Enrollment Members for Case Management + Add / Edit Members

Client	Provider	Program Entry - Exit Dates	Restriction	Exit Type	Member
Kirk, Shawn	Family Promise of Blount County	1/8/2016 - Present	Shared		192
Raby, Amber	Family Promise of Blount County	1/8/2016 - Present	Shared		192



Then click on the CHECKMARKS to make EVERYONE have a BLUE CHECKMARK. Make sure the enrollment and dates are all the same as the HOH. Click SAVE.


⚠ Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HoH.

💡 Choose the family members you want to include in this enrollment from the list below.


	Client	Provider *	Restriction *	Begin Date *	End Date
<input checked="" type="checkbox"/>	Kirk, Shawn		Shared	1/8/2016	Present
<input checked="" type="checkbox"/>	Raby, Amber		Shared	1/8/2016	Present
<input checked="" type="checkbox"/>	Raby, Dewayne				
<input checked="" type="checkbox"/>	Kirk, Collin				

(Usually after this I will go back in and make sure they ALL have BLUE checkmarks).

Then they are enrolled, but you have to add each assessment in separately. So after this, go to HUD


ASSESSMENT DASHBOARD > HUD UNIVERSAL , then ADD NEW,  then click on the blue bar TEXT,

💡 HUD Universal

Assessment ★ 

then select the ENTRY Assessment, (IF QUESTIONS SHOW UP, THEN ANSWER THEM...) then SAVE.

💡 HUD Universal

Assessment ★ 

[+ New Assessment](#) [Copy Current Assessment](#) [Copy Assessments](#) [Edit Date/Restriction](#)

Date	Program	Type
1/8/2016	Family Promise ESG RRH	At Entry

Do this for the HUD PROGRAM, HUD FINANCIAL, and only if there is insurance > HUD INSURANCE.