

All household members must have an assigned member type.



Each household must have a Head of Household assigned. The HoH will have a star next to their name.

Household Management Guide

Steps to create and edit household members

RT Robert Thomas
You are currently viewing the Client Record pages for Robert Thomas (BIT454652).

Profile
Privacy
Household
Reports
Units/Beds
Care Team
History
Programs
Notes
Files
Contacts
Location
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Forms

Current household members
Active members of this client's household

Client	Join Date
Jason Smith Not Set	8/5/26 1 months 23 days ago
RT Robert Thomas Uncle	8/5/26 1 months 23 days ago

Former household members
Other clients that are no longer in this household

Previous household history
Other households that this client is no longer a member of

Steps to Add a New Household Member

- Select the Household tab
- Select the Add button

Add household member

1 Select or add a client

Clients
Select or create a client that will be added to the household

Showing recently accessed clients. Use the search bar above to find other clients.

Client	Date of Birth	SSN	Last Updated
AJ Arthur Jackson	7/21/60	1166	6/5/26
Bitfocus Test			

- Search for an existing profile or select from recently accessed clients
- Click Next

2 Set household member information

Add Household Member
Add Sophia Washington to household

Member Type *
Daughter

Joined Household *
09/28/2026
MM/DD/YYYY

Cancel Save

Back

- Select the new household member type
- Enter the day they joined the household
- Select Save

Household

Edit Household Member
Edit household membership for Robert Thomas

Head of Household
Robert Thomas (Self)

Member Type
Uncle

Joined Household
08/05/2026

Exited Household

Steps to edit an existing Household Member

- Search for the client profile
- Select the Household Tab
- Select the pencil to edit the household member

Edit Household Member
Edit household membership for Jason Smith

Head of Household *
Jason Smith (Self)

Member Type *
Father

Joined Household *
08/05/2026
MM/DD/YYYY

Exited Household
MM/DD/YYYY

Cancel Save

- Change the Head of Household by selecting the new name from the drop-down list
- Change the member type by selecting the new type from the drop-down list
- If the household member is no longer part of the household, enter a date in the Exited Household field and select Save

Want to learn more about household management? Visit the [Online Help Center](#).