How to Avoid Head of Household Most Common Error

This How to Guide will show you how to correctly switch the head of household when the initial head of household exits the project, but the rest of the case members remain enrolled in the project.

1. When you need to exit a client from an enrollment, click on the three dots next to the enrollment from the project enrollment, and **select "Exit the Enrollment"** from the drop-down menu.

a) If you do not wish to exit the other household members, then **select "No" when asked "Do you wish to exit 'name'?"**. Then, continue through the exit workflow and click **"Finish"** at the end of the exit workflow. As shown in the images below.

HUD Program Exit	Tzar Romanoff 10/1/1964	Social Security Number XXX-XX-3333	Client ID 1048352

- ⊘ Exit Enrollment
- › ⊘ Exit Assessments
- › ⊘ Romanoff, Anastasia
- › ⊘ Romanoff, Parmesan

⏸ Pause   ✕ Cancel

You're done!

All required steps have been completed.

Finish
Close the workflow

2. Once the client, in this case the head of household, has been exited properly, you will see an exit date for the enrollment in question in the client dashboard.

	Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination
∨ **Exited**								
	∨ **PH - Rapid Re-Housing**							
•••	**My Fake Organization CoC RRH (RRH-R8)**	3	03/01/2022		04/24/2023	1972076	1972079	Hospital or other residen...

3. Since the head of household has been exited, you need to appoint a new head of household for the enrollment. To do this, **click on the three dots next to the enrollment** in question, and **select "View Case Members"** from the drop-down menu as shown below.

	Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination
∨ Exited								
∨ PH – Rapid Re-Housing								
•••	My Fake	3	03/01/2022		04/24/2023	1972076	1972079	Hospital or other residen...
	🏠 Add Household Member							
	👥 View Case Members							
	🕘 Missed Annual/Update Assessment							

4. You will see a new window with case member information as shown below. Notice that the head of household has an exit date. To change other case member to be the new head of household, **click on the three dots next to the client who will be the new head of household, and select "Edit Enrollment" from the drop-down menu**.

	Case Member	Grant	Relationship	Enroll Date	Exit Date
•••	Romanoff, Tzar		Self	03/01/2022	04/24/2023
•••	Romanoff, Parmesan		Son	03/01/2022	
•••	Romanoff, Anastasia		Spouse	03/01/2022	
	🖊 Edit Enrollment				
	➡ Exit Enrollment				
	🗑 Delete				

5. A new window will pop up as the one shown below. If you scroll down, you will see the field that says, **"Relationship to the head of household."** From the drop-down menu, **change the relationship to "Self." Click "Save"** as show in the image below.

Complete the following information to add a client to this case.

Family Member: * Romanoff, Anastasia 🔍

Gender:
✔ Female
Male
A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
Transgender

Birth Date: 01/01/1970

Race:
American Indian, Alaska Native, or Indigenous
✔ Asian or Asian American
Black, African American, or African
Native Hawaiian or Pacific Islander
✔ White

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) ⌄

Entry Date: * 03/01/2022 📅

Relationship to Head of Household: * Self ⌄ ⬅

Comments:

Assessment

Please choose the Assessment containing accurate data at the time of the enrollment.

Assessment Date: * 3/1/2022 12 🔍

Assessment Type: Entry ⌄

⬅ ✔ Save

6. You will now go back to the previous screen, and you will notice that two case members have the "Relationship" field set to "Self." This is a problem since **no project enrollment can have two head of households ("Self).**

	Case Member	Grant	Relationship	Enroll Date	Exit Date
•••	Romanoff, Tzar		Self	03/01/2022	04/24/2023
•••	Romanoff, Parmesan		Son	03/01/2022	
•••	Romanoff, Anastasia		Self	03/01/2022	

7. Click on the three dots next to the previous head of household who was exited and **click on "Edit Enrollment"** from the drop-down menu.

3 results found.

	Case Member	Grant	Relationship	Enroll Date	Exit Date
•••	Romanoff, Tzar		Self	03/01/2022	04/24/2023
	✏ Edit Enrollment		Son	03/01/2022	
	➡ Exit Enrollment				
	📂 Reenter Enrollment		Self	03/01/2022	
	🗑 Delete				

8. A new window will pop up as the one shown below. If you scroll down, you will see the field that says, **"Relationship to the head of household."** From the drop-down menu, **change the**

relationship from "Self" to the appropriate relationship, in this case it is "Spouse"**." Click Save."**

Complete the following information to add a client to this case.

Family Member: * Romanoff, Tzar 🔍

Gender:
Female
✔ Male
A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
Transgender

Birth Date: 10/01/1964

Race:
American Indian, Alaska Native, or Indigenous
✔ Asian or Asian American
Black, African American, or African
Native Hawaiian or Pacific Islander
White

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) ⌄

Entry Date: * 03/01/2022 📅

Relationship to Head of Household: * Spouse ⌄

Comments:

Assessment

Please choose the Assessment containing accurate data at the time of the enrollment.

Assessment Date: * 3/1/2022 12 🔍

Assessment Type: Entry ⌄

✔ Save

9. You will no longer see or have two head of households for the enrollment in question. You have successfully exited the head of household and appointed another case member to be the new head of household.

The Case Members display below. To view or add the household application select the edit button on the left hand side of the member you would like to edit.

+ Add New   **Copy Family**

3 results found.

	Case Member	Grant	Relationship	Enroll Date	Exit Date
•••	Romanoff, Tzar		Spouse	03/01/2022	04/24/2023
•••	Romanoff, Parmesan		Son	03/01/2022	
•••	Romanoff, Anastasia		Self	03/01/2022	