



Creating and Editing Global Households

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What are Households?

When people experiencing homelessness seek services together, their client profiles must be connected in HMIS. This is achieved by creating a global household. Clients do not need to be married or blood related. They are allowed to create their own household groups with no restrictions. Examples of HMIS global household can include:

- Parents and their children (including single parents)
- An adult, their sibling, and their grandparent
- Two or more adult roommates or friends who want to be housed together
- Two single mothers and their children
- A single client alone (this would be a household of one)

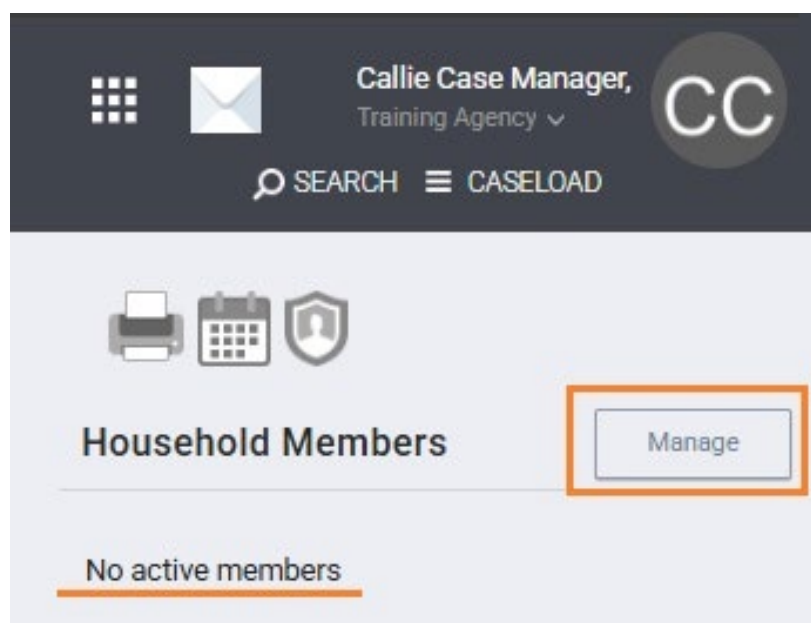
Regardless of the composition of the household, all clients (including newborns) must have their own client profile before they can be connected to one another. For a refresher on how to successfully create a new client profile in HMIS, please use our [Creating a New Client Profile job aid](#).

Creating a Global Household

Every HMIS Global Household has one client designated as the **Head of Household** (HoH). This is the primary member of the household and all other household members are identified via their relationship to the HoH (e.g. child, spouse, etc). If your program is designed to serve a specific population, like veterans, your HoH will need to be the client who is a member of that population.

Adding Clients to the Household

To create a global household, you need to first open the HoH's client profile screen. On the right side of the screen, you will find the Household Members section. In the image below, you can see both the "Manage" button and the list of clients present in the HoH's global household. In this example, there are no active members in their global household.



When you click on the “Manage” button, you move to the Household Management screen, which you can see in the image below.

The screenshot shows the 'HOUSEHOLD MANAGEMENT' interface. On the left, there is a search bar with the placeholder text 'Search for a Household Member' and a 'SEARCH' button. Below the search bar, it says 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' Underneath, there is a section titled 'Household History' with an illustration of a stack of papers and the text 'No results found'. On the right side, there is a sidebar with two sections: 'Household Members' which says 'No active members', and 'Your recent client searches' which contains a table with one entry: 'Mother Test (She/Her/Hers)' with the value '1131'.

On the top left, you can use the same search function we have on the main search page to find the clients you want to include in this household. On the right side of the Household Management Screen, there is a list of the most recent clients you have been looking at as well as a list of the current members of this global household. If you have been creating profiles or updating client profile data in preparation for creating or editing a global household, these clients will be listed on the right, making it easier for you to add the clients to the household.

After searching for Baby Test, the client’s information has come up. Before adding the client to the household, please review the date of birth and the last four of the client’s SSN to make sure you have the right client.

The screenshot shows the 'HOUSEHOLD MANAGEMENT' interface with the search bar containing 'Baby Test' and the 'SEARCH' button. Below the search bar, it says 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' Below this, there is a table with the following data:

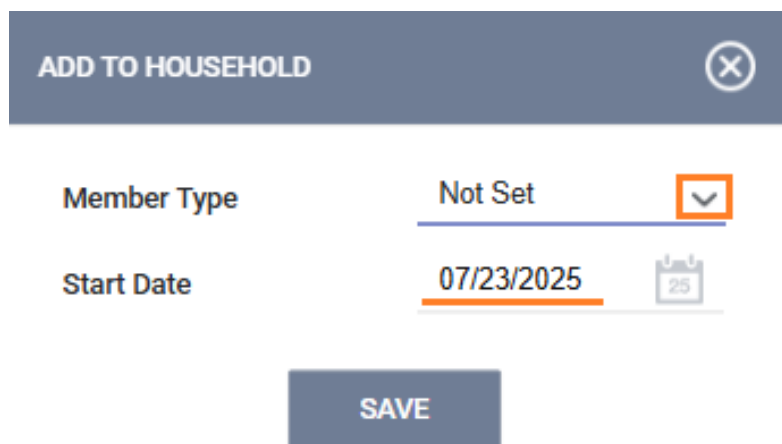
Client	Date of Birth	Last Four SSN	Last Updated
+ Add Baby Test	10/31/2018	9999	02/17/2025

To add this client to the HoH's household, hover over their name and click the +Add button. This will open the Add to Household window. The image below shows two data elements – member type and start date - that you will need to obtain to successfully add this client to the global household.

Member Type refers to the relationship the new client has to the HoH. The list of relationships is long, over twenty-five different options. These include the most common relationships (husband, wife, mother, son), terms for blended families (stepson, stepdaughter), additional terms for couples (significant other, domestic partner), terms for extended family members (grandparent, cousin, aunt), gender neutral terms (spouse, child, parent, sibling), and terms for non-relatives (roommate, guardian).

Remember, this question refers to the relationship that this new client (in this case, Baby Test), has to the Head of Household. In our situation, the HoH is the baby's grandfather, so we chose grandchild as this client's member type.

The **Start Date** is the date the client is added to this household. This date must be on the same date or prior to the date that the clients are going to be enrolled in a program.



ADD TO HOUSEHOLD

Member Type Not Set

Start Date 07/23/2025

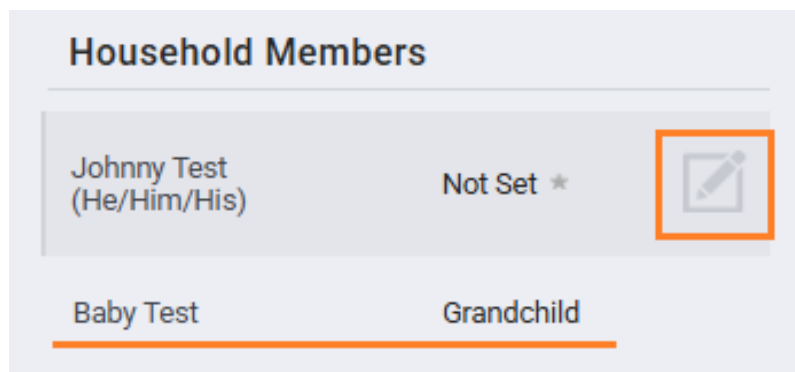
SAVE

Note About Newborns

Adding a newborn child to HMIS and connecting them to the family's global household can be a little confusing. For the global household, please make sure the start date is on or after the client's date of birth to avoid data quality errors. For more information, please review our [Guidance for Serving Newborn Clients](#) info sheet.

Completing the Household Set Up

Once added to the household, the client names will appear on the right side of the screen in the Household Members section. As you can see in the image below, Baby Test is now listed as part of Johnny Test's global household. While Baby Test's relationship with the HoH has been recorded, Johnny's relationship is still not set. To update this information, click on the edit icon to open the Edit Global Household window. While most of the data in HMIS will have the HoH's member type listed as "self", at the global household level we need to choose one of the member types we listed previously.



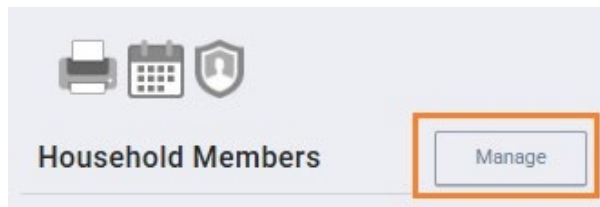
In this case, the household composition is only Johnny Test (our HoH) and his grandchild Baby Test. Since there are no other relationships here, we would choose "Grandfather" for Johnny's member type. Similarly, if the household is a couple, the member types could be husband and wife, or spouse and spouse. In situations where the family is much larger, like a family with multiple children or a multi-generational family, you should use your best judgement to assign member types to make the family dynamic as clear as possible. Here are a few examples:

- A household with a couple and their three children may be listed as Husband (HoH), Wife, Daughter, Son, and Son. They could also be listed as Mother (HoH), Father, Daughter, Son, and Son.
- In a multi-generational household where the HoH is at the center of the family, you'd want to choose member types that illustrate this. You can have a Mother (HoH), a Grandmother and Grandfather (her parents), and a daughter and son (her children).

While member types for most households will be fairly easy to document, if the household you are working with is complex, choose member types that will make it easy for others to easily understand the relationships between the global household members.

Ending a Household Membership

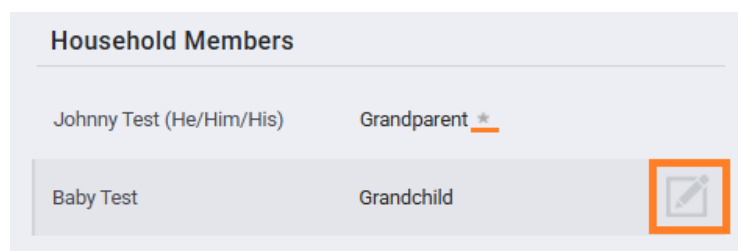
There are times when a household member decides they want to leave the household. This can happen because of a romantic break up, an adult child wishing to gain their own services, or clients deciding to break the household apart to take advantage of shelter or housing opportunities that would not be able to serve the whole household.



To begin, open the client's profile page and click on the Household Members "Manage" button. This brings up the Household Management screen, which we previously used to add clients to the global household.

On the right is a list of all household members. In the image below we have two household members. The small star next to Johnny's household relationship indicates that he's the HoH. Hovering over Baby Test's name, we get the edit button on the right.

Clicking on the edit button brings us to the Edit Global Household pop up window. If you click the "Exited Household" toggle, a date section appears. Enter the date that the client leaves the household here and hit save.



 A screenshot of the 'EDIT GLOBAL HOUSEHOLD' pop-up window. The title bar says 'EDIT GLOBAL HOUSEHOLD' with a close button. The form contains the following fields:

- Member Type:** A dropdown menu showing 'Grandchild'.
- Head of Household:** A dropdown menu showing 'Johnny Test (He/Him/His)'.
- Joined Household:** A date field showing '05/01/2025' with a calendar icon.
- Exited Household:** A toggle switch that is currently turned on (blue). Below it is a date field with a calendar icon.

 At the bottom of the form is a blue button labeled 'SAVE'.

Changing the Head of Household

All global households must have a Head of Household (HoH). If you exit the HoH from a household, you will need to assign another client as the new HoH. Just like we did in the Ending a Household Membership section above, we start with the client record. This time we can choose any client in the household. We click on the Household Members “Manage” button to gain access to the Household Management screen and look to the right to see the list of current household members.

Household Members	
Johnny Test (He/Him/His)	Grandparent *
Baby Test	Grandchild

In the image below, we are using a different test family. In this global household we have Mother Test, who is the current HoH, Mr. Mother Test, and Kirk Test, their grandchild. In the image on the left, we have opened the Global Household to edit this information. The Head of Household is listed as Mother Test. By clicking on this option, we get a drop down of all household members. On the right we are choosing Mr. Mother Test to be the new HoH. Once you hit save, the household information for all clients in this household will show that the HoH is now Mr. Mother Test.

EDIT GLOBAL HOUSEHOLD ✕

Member Type: Wife ▼

Head of Household: Mother Test (She/Her/He) ▼

Joined Household: 07/23/2024 📅

Exited Household: ☐

SAVE

EDIT GLOBAL HOUSEHOLD ✕

Member Type: Wife ▼

Head of Household: Mother Test (She/Her/He) ▼

Joined Household: 📅

Exited Household: ☐

SAVE

Once you make a change like this, please go back into the accounts of all other clients within the global household to update their member type, reflecting their relationship with the new HoH.