Quick Start Guide for *Household Reporting*

1 What is the purpose of household reporting?

To allow for reporting efficiency as a single household unit. The system sends one daily report message to the designated Head of Household to report on behalf of all household members.

2 How do I enroll a new household?

1. Click "Enroll New Monitoree" to enroll Head of Household (by default the first record created)
2. On the enrollment review screen, select "Finish and add a Household Member"
3. Enter information on the first enrollment screen and review remaining information
    - The remaining enrollment screens will pre-populate with same information as the Head of Household record. Info be edited if different among household members.
4. Select "Finish and add a Household Member" to continue adding new household members
5. Once all household members have been enrolled, click "Finish" at the bottom of the enrollment review screen to close household enrollment.

3 When are records automatically linked as a household?

- On import, when the preferred reporting contact information is an exact match
- On enrollment, when the preferred reporting contact information is an exact match

4 Where can I see which monitorees are linked as a household?

Household records are linked at the top of each monitoree's record

- If a Head of Household, links are provided to each monitoree they are reporting on behalf of
- If a household member, a link to the Head of Household is provided.
- If not part of a household, no links are shown

5 How do I change the Head of Household?

1. Open the Head of Household's record. Click the "Change Head of Household".
2. Select the member of the household you would like to make Head of Household from the drop down list and Click "Update".

6 How do I modify an existing household?

To add monitoree to household:
1. Open Head of Household record for household you would like to add record to
2. Select "edit details"
3. Select "Finish and Add Household Member". Complete enrollment and click "Finish"

To remove monitoree from household:
1. Open record of interest
2. Select "edit details" then "edit" for the "Contact Information" section.
3. Update email and primary telephone number (must be different from head of household)
4. Select "Next" then "Finish" to save the changes.
5. Select "Remove from Household"

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