

CaseWorthy - How to Add and Enroll a Family Member to an Existing Family Using The Workflow



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Overview

Steps on adding family members to an existing program enrollment in CaseWorthy using the “**Add and Enroll Family Member**” workflow.

Instructions

1. Navigate to the HoH (**Find Client**).
2. Click **Case Management** in the left side menu.
3. Click on the **Family and Contacts** sub menu item.
4. Next, click on the **Family** icon.
5. On the Client Families form, click on the **Gear** for the family you would like to add/enroll a family member into.
6. Click the **Add and Enroll Family Member** option.
7. Enter some demographic information for the new family member and click **Check for duplicates**.
8. Select the person from the list OR click this is a new client if the person is not found.
9. **Verify all required fields have been completed.**
10. Enter family member information and complete the workflow.
11. Click **Save**.