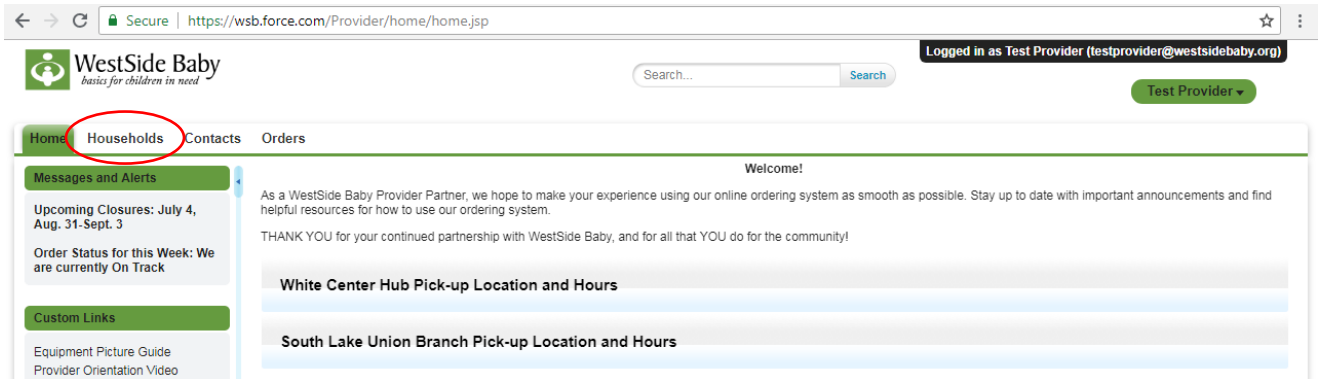
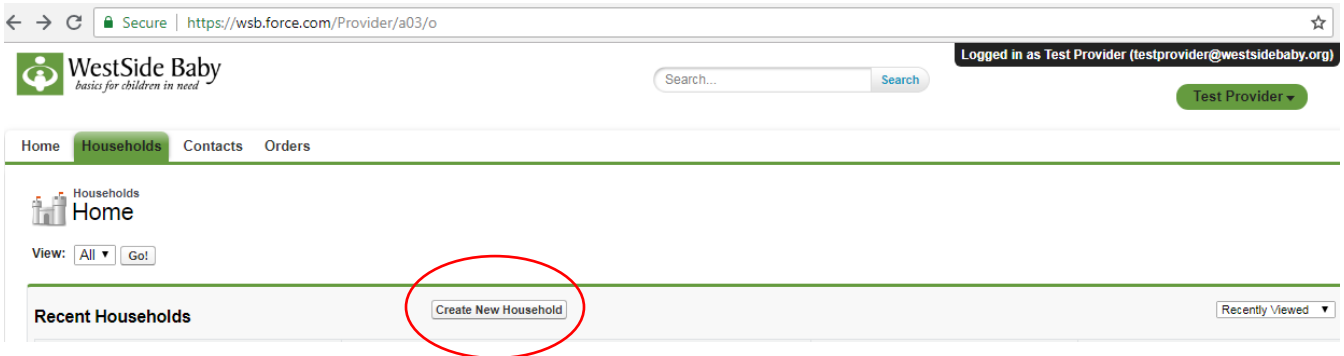


How to Create a New Household

1) After logging in to wsb.force.com, select the “Households” Tab from the Provider Homepage



2) Click the “Create New Household” button that appears in the middle of the page.



3) Enter accurate information about the family in the listed fields

The screenshot shows the 'New Household' form. The form is titled 'Household Edit' and includes the following fields:

- Household Name:
- Organization:
- Number of Household Members:
- Primary Caregiver:
- Family Housing Status:
- Primary Caregiver Employment Status:
- Mailing City:
- Primary Caregiver on Disability?:
- Mailing Zip/Postal Code:

The form also includes a 'System Information' section with the following details:

- Owner: Test Provider
- Last Updated by: Provider

Buttons for 'Save', 'Save & New', and 'Cancel' are located at the top and bottom of the form.

How to Create a New Household

- a. Household Name = the last name of the family
 - b. Organization= your agency/program/site. This will auto-populate upon “save”-- **Leave this field blank**
 - c. Primary Caregiver – select “Two-Parent Household”, “Single-Parent Household”, “Foster Parent”, “Grandparent”, “Other Relative”, or “Other” from the drop-down menu
 - d. Primary Caregiver Employment Status- select “Full-Time”, “Part-Time”, “Unemployed”, or “Unknown” from the drop-down menu
 - e. Primary Caregiver on Disability- Check box if applicable
 - f. Family Housing Status- select “Homeless”, “Long Term Housing”, “Transitional Housing”, “Shelter”, or “Unknown” from the drop-down menu
 - g. Mailing City- enter the city of residence of the family
 - h. Mailing Zip/ Postal Code- enter the zip code of the family’s residence. If family is homeless, enter “00000”
- 4) Once completed,
- a. Select the “Save” button at the bottom of the page to save the Household record. This will direct you to a page where you can edit information for this Household by selecting the “edit” button or add new recipients to the Household by selecting the “New Recipient” button.

WestSide Baby
basics for children in need

Logged in as Test Provider (testprovider@westsidebaby.org)

Search... Search

Test Provider

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Household Edit
New Household

Household Edit Save Save & New Cancel

Household Name Doe Number of Household Members 4

Organization

Demographics * Required Information

Primary Caregiver Single-Parent Household Family Housing Status Long Term Housing

Primary Caregiver Employment Status Part-Time Mailing City Seattle

Primary Caregiver on Disability? Mailing Zip/Postal Code 98146

System Information

Owner Test Provider Last Updated by Provider

Save Save & New Cancel

How to Create a New Household

This screenshot shows the 'Household Detail' page for a household named 'Doe'. The page is divided into several sections: 'Household Detail', 'Demographics', and 'System Information'. A yellow notification banner at the top states 'Household has been updated.' with a red arrow pointing to an 'Edit' button. The 'Household Detail' section includes fields for Household Name (Doe), Organization (Associated Council for the Accused - Prefontaine Place), and Number of Household Members (4). The 'Demographics' section includes Primary Caregiver (Single-Parent Household), Family Housing Status (Long Term Housing), Primary Caregiver Employment Status (Part-Time), Mailing City (Seattle), and Mailing Zip/Postal Code (98146). The 'System Information' section includes Created By (Test Provider), Last Modified By (Test Provider), Owner (Test Provider), and Last Updated by Provider (6/15/2018). A red arrow points to another 'Edit' button. At the bottom, there is a 'Household Members' section with a 'New Recipient' button and a 'No records to display' message.

- b. Alternately, you can select the "Save & New" button at the bottom of the page. This will direct you the page where you can enter another Household record.

This screenshot shows the 'Household Edit' page for a 'New Household'. The page is divided into several sections: 'Household Edit', 'Demographics', and 'System Information'. The 'Household Edit' section includes fields for Household Name (Doe), Organization (Associated Council for the Accused - Prefontaine Place), and Number of Household Members (4). The 'Demographics' section includes Primary Caregiver (Single-Parent Household), Family Housing Status (Long Term Housing), Primary Caregiver Employment Status (Part-Time), Mailing City (Seattle), and Mailing Zip/Postal Code (98146). The 'System Information' section includes Owner (Test Provider) and Last Updated by Provider (6/15/2018). A red arrow points to the 'Save & New' button at the bottom.

How to Create a New Household

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Household Edit
New Household
✓ Household has been updated.

Household Edit Save Save & New Cancel

Household Name Number of Household Members
Organization

Demographics * Required Information

Primary Caregiver Family Housing Status
Primary Caregiver Employment Status Mailing City
Primary Caregiver on Disability? Mailing Zip/Postal Code

System Information

Owner Test Provider Last Updated by Provider

Save Save & New Cancel