

How to Create Families, Parents, and Children

Roles that Have Access: Home Visit Manager, Home Visit Supervisor, Home Visitor

Essential information for all families participating in your Home Visiting initiative can all be tracked inside of the Hubbe system. Within the system, there are individual records for a family, a parent, and children (students). In this instruction sheet, we will cover how to create a family record, as well as how to create parent and child (student) records.

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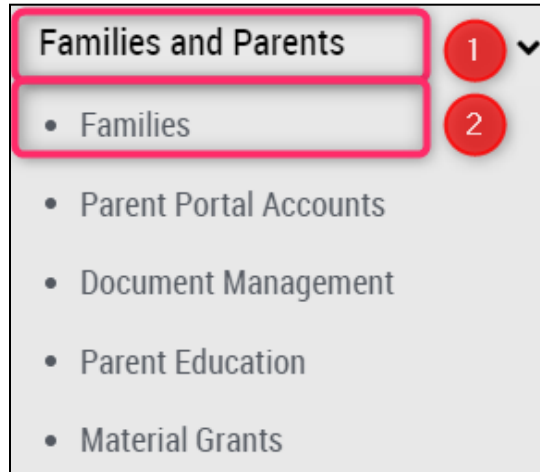
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Creating a Family Record

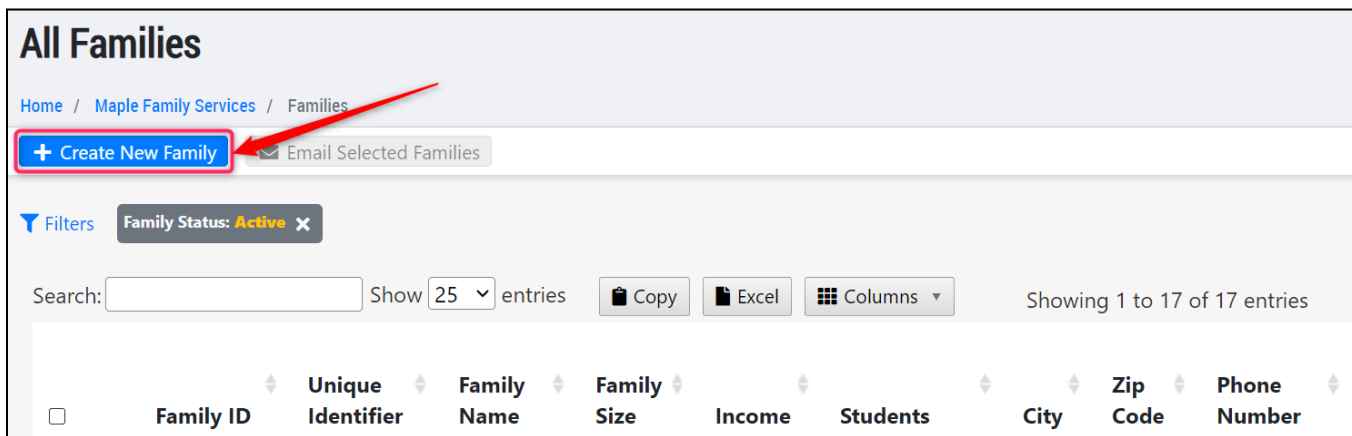
In order to create a new family inside of the system, you must have one of the following three roles: **Home Visit Manager, Home Visit Supervisor, or Home Visitor**. If you have one of these three roles, then proceed. If you do not have one of these roles and think you should, contact your supervisor for support.

In order to create a new family record, navigate to the “Families” grid from the **Home Visit Manager** menu. Click on “Families and Parents” and then select “Families.”



2 The “All Families” grid is a helpful place to review all of the families inside of your agency from a single place. This grid has many powerful functions, and becoming familiar with this grid is essential for overseeing and managing family data.

In order to create a family, click the blue “+ Create New Family” button at the top of the record.

A screenshot of the "All Families" grid interface. The title "All Families" is at the top left. Below it is a breadcrumb trail: "Home / Maple Family Services / Families". A red arrow points to a blue button labeled "+ Create New Family". To the right of this button is a button labeled "Email Selected Families". Below the buttons is a "Filters" section with a dropdown menu showing "Family Status: Active". There is a search bar and a "Show 25 entries" dropdown. Below the search bar are buttons for "Copy", "Excel", and "Columns". At the bottom right, it says "Showing 1 to 17 of 17 entries". The main content area is a table with columns: Family ID, Unique Identifier, Family Name, Family Size, Income, Students, City, Zip Code, and Phone Number. Each column has a small double-headed arrow icon next to it.

3

This will open a modal titled “Create New Family.” Here you can enter in some initial information about a family to create their record in Hubbe. Please note that a lot of these fields are not relevant to Home Visiting programs and can be ignored for now. The only required fields are the “Household ID” and “Household Name” fields. After entering information into these fields, click the blue “Save” button to finalize the creation of the new family.

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Clicking the blue “Save” button will automatically redirect you to the new family record you just created. The family record is home to information about a family and if you would like to make any changes to the family’s general information, click the blue “Edit” button at the top of the family record.

This will prompt an “Update Smith Family” modal to pop up, which should appear like this:

The screenshot shows a modal window titled "Update Smith Family" with a close button in the top right corner. The form contains the following fields:

- Household ID: HH001089
- Household Name: Smith Family
- Primary Contact: (empty dropdown menu)
- Primary Contact Phone Number: (empty text field)
- Primary Contact Email: (empty text field)
- Unique Identifier: (empty text field)
- Family Identification / Case Number (FICN): HH001089
- CalFresh Case Number: (empty text field)
- CalWORKS Case Number: 1596
- FDPIR Case Number: (empty text field)
- Family Size: 3
- Initial Subsidized Service Date: mm/dd/yyyy (calendar icon)
- End of Service Date: mm/dd/yyyy (calendar icon)

At the bottom right, there are "Cancel" and "Save" buttons.

If you are a CalWORKS funded program, you will want to make sure that you enter the CalWORKS Case Number for the family. This field has important implications for reporting at the end of the year.

A close-up of the "CalWORKS Case Number" field, showing the text "1596" entered in the input box.

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Once you are satisfied with the information that has been entered for the family record, you can proceed with the creation of a parent/guardian record in the following section.

Creating a Parent/Guardian Record

In order to create a record for a parent or guardian, you must start from a family record. In the previous section, we created a new Family record for the “Smith Family”. From the Smith Family record, navigate to the “Parents” tab and click the blue “Add Parent” button.

Smith Family

Home / Maple Family Services / Smith Family

Edit Delete Add Students to Class/Site List Download Status: Active

Household ID
HH001089

Unique Identifier

Site Preference + Add

Main Contact (Parent A)

To add an address, you must first add a parent to the family and mark them as Parent A.

Assigned Staff

Billing Contact:
Family Liaison:

Created: 7/17/2023 1:18 PM
by Alex Cho

Last Updated: 7/17/2023
1:18 PM by Alex Cho

Children Enrolled **Parents** Non-Participating Children Emergency Contacts / Authorized Pickups Custom Fields Family Case Notes Family Documents

Add Parent

2

This will open an “Add New Parent” modal, where you can enter some initial information about the parent in order to create their record in Hubbe. Please note that some of these fields are not relevant to Home Visiting programs and can be ignored for now.



Some fields that **do** have a significant impact on reporting and are recommended to complete include the “First Name,” “Last Name,” “Parent ID,” “Primary Language,” “Ethnicity,” and “Race” fields. After completing these fields, click the blue “Save” button to finalize the creation of the new parent.

Add New Parent

First Name	Middle Name	Last Name
<input type="text" value="Michael"/>	<input type="text"/>	<input type="text" value="Smith"/>
Parent ID	Courtesy Title	Designation Title
<input type="text" value="PA001066"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
Professional Title	Unique Identifier ⓘ	Parent Best Described As
<input type="text" value="None"/>	<input type="text"/>	<input type="text" value="- SELECT -"/>
Parent A or B	Head of Household	Parent Gender
<input type="radio"/> A <input type="radio"/> B	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Male <input type="radio"/> Female
Is parent a single parent?	Birth Date	Highest Education Level
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>
Country of Birth	State of Birth	City of Birth
<input type="text" value="- SELECT -"/>	<input type="text" value="- SELECT -"/>	<input type="text"/>
Language (select all that apply)	Primary Language	Preferred Language for Messaging
<input type="text" value="+ Add Language"/> <input type="text" value="x English"/> <input type="text" value="x Spanish"/>	<input type="text" value="English"/>	<input type="text" value="English"/>
Ethnicity	Race (select all that apply) <input type="text" value="+ Add Race"/>	
<input type="text" value="Hispanic or Latino"/>	<input type="text" value="x Two or more races"/>	
Home Phone Number	Mobile Phone Number	Work Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Preferred	<input type="checkbox"/> Preferred <input type="checkbox"/> Allow	<input type="checkbox"/> Preferred

3

After clicking the blue “Save” button, the newly created parent will appear in the “Parents” tab. Click the blue “View” button to view the parent record.

Children Enrolled | **Parents** | Non-Participating Children | Emergency Contacts / Authorized Pickups | Custom Fields | Family Case Notes | Family Documents

[Add Parent](#)

Michael Smith [View](#)

Single Parent

Parent Contact **Language:** English, Spanish
Messaging Language: English
Ethnicity: Hispanic or Latino
Race: Two or more races

Parent Income

Authorized to sign official documents: Yes
Authorized to pick up the children: No

Once you’ve been redirected to the parent record, you can click the blue “Edit” button to make changes to the parent’s information.

Michael Smith

Home / Maple Family Services / Smith Family / Michael Smith

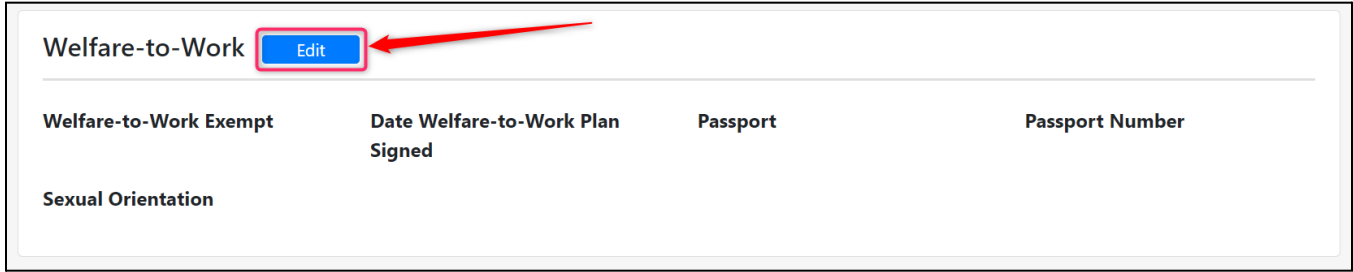
[Setup Portal](#) [Status: Active](#)

Parent Information [Edit](#)

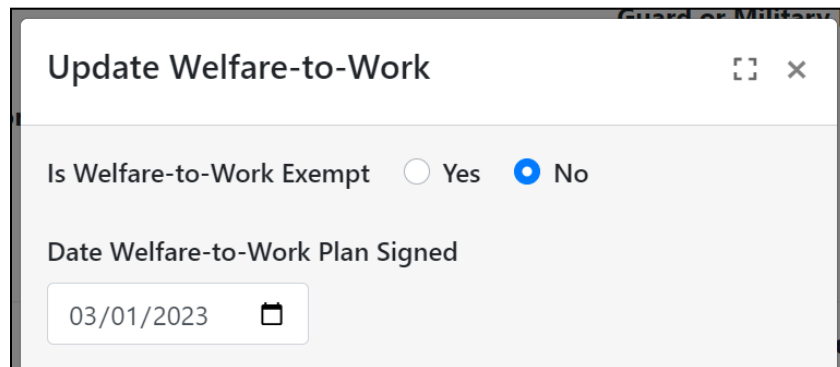
Parent ID PA001066	Courtesy Title None	Designation Title None	Professional Title None
Unique Identifier	Parent Best Described As	Is Single Parent Yes	Parent A or B

4

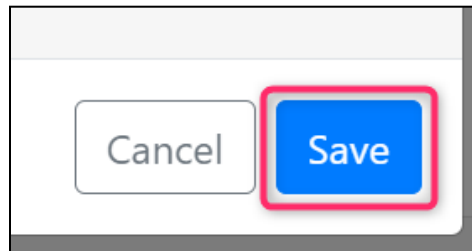
If you are a CalWORKS funded program, there are additional fields on this record that have implications on the HVP 19 report and should be filled out. If you know the current state of the Welfare-to-Work status, scroll down to the “Welfare-to-Work” card and click on the blue “Edit” button to open up the modal.



You can enter the current state of the Welfare-to-Work status here. If this is unknown at this time, you can ignore it for now and return to it later.



If you do enter this information, finalize your data entry by clicking on the blue “Save” button at the bottom of the page:



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You can repeat this process again if you have another parent/guardian that will be participating. Once all of the parents have been created, you are ready to add in a child (student) to this family. We can navigate back to the Smith Family record to begin creating a child (student) Record.

Creating a Child (Student) Record

You have to start from a family record in order to create a record for a child. In the previous section, we created a new Family record for the Smith family. In order to create a new child record, navigate to the “Children Enrolled” tab and then click the blue “Add Child” button.

Smith Family

Home / Maple Family Services / Smith Family

Edit Delete Add Students to Class/Site List Download Status: Active

Household ID
HH001089

Unique Identifier

Site Preference + Add

Main Contact (Parent A)

To add an address, you must first add a parent to the family and mark them as Parent A.

Assigned Staff

Billing Contact:

Family Liaison:

Created: 7/17/2023 1:18 PM by Alex Cho

Last Updated: 7/17/2023 1:18 PM by Alex Cho

Children Enrolled Parents Non-Participating Children Emergency Contacts / Authorized Pickups Custom Fields Family Case Notes Family Documents

Add Child Assign Existing Child

2

This will prompt a “Create Student” modal to open. Here we can enter some initial information about the child in order to create their record in Hubbe. Please note that a lot of these fields are not relevant to Home Visiting programs and can be ignored for now.



Some fields that **do** have a significant impact on reporting and are recommended to complete include the “First Name,” “Last Name,” “Student ID,” and “Date of Birth” fields. After completing these fields, click the blue “Save” button to finalize the creation of the new parent. Please note that there are other fields that will have to be completed once the record is created.

The image shows a web form titled "Create Student" with a close button in the top right corner. The form is organized into a grid of input fields. The following table summarizes the visible data and controls:

Field Name	Value / Control
First Name	Tabitha
Middle Name	(Empty)
Last Name	Smith
Student ID	ST001066
Unique Identifier	(Empty)
Preferred Name	(Empty)
SSID	(Empty)
Date of Birth	02/02/2023
Expected Date of Birth?	<input type="checkbox"/> (Unchecked)
Country of Birth	- SELECT -
State of Birth	- SELECT -
City of Birth	(Empty)
Weeks Premature	Not Premature or Not App
Birth Certificate Number	(Empty)
Date the child was first served in the program	mm/dd/yyyy
QRIS Parent Consent	<input checked="" type="radio"/> Yes <input type="radio"/> No
Photo/Video Consent	- SELECT -

At the bottom right of the form, there are two buttons: "Cancel" and "Save". A red arrow points from the "Save" button towards the top right of the form area.

3

After clicking the blue “Save” button, the newly created student will appear in the “Children Enrolled” tab. Click the blue “View” button to view the parent record.

The screenshot shows a web interface with a top navigation bar containing tabs: "Children Enrolled", "Parents", "Non-Participating Children", "Emergency Contacts / Authorized Pickups", "Custom Fields", "Family Case Notes", and "Family Documents". Below the tabs are two buttons: "Add Child" and "Assign Existing Child". A red box highlights a student record for "Tabitha Smith" with an "Active" status and a "View" button. A red arrow points to the "View" button. The student record details include: Student ID: ST001066, Age: 0 years, Date of Birth: 2/2/2023, Gender: Unknown, Ethnicity: Unknown, Initial Entry Date: 7/17/2023, Subsidy Type: (blank), Dual Language Learner: (blank), Language: Unknown / Declined, QRIS Consent: Yes, Parent Decline ASQ: No, and Current Schedule: - No current schedules -.

Once you’ve been redirected to the student record, you can click the blue “Edit” button to make changes to the student’s information.

The screenshot shows the student record page for "Tabitha Smith". It includes a profile picture placeholder, the name "Tabitha Smith", and a breadcrumb trail: "Home / Maple Family Services / Tabitha Smith". There are "Download" and "Status: Active" buttons. The main content area is divided into three sections, each with an edit icon: "General Information", "Student Contact", and "Demographic Information".

General Information	Student Contact	Demographic Information
Student ID: ST001066 First Name: Tabitha Middle Name: Last Name: Smith Unique Identifier: SSID: Date of Birth: 2/2/2023 Date the child was first served in the program: QRIS Parent Consent: Yes Photo/Video Consent:	Parent A Address:	English Language Learner: Language: Unknown / Declined English is the child's only home language: No Ethnicity: Unknown Race: Unknown Gender: Unknown

4

If you have a CalWORKS funded program, there are additional fields on this record that have implications on the HVP 19 report and should be completed. On the student record, click on the pencil icon next to “Demographic Information” to begin entering additional information about the child.

If you know information about the “Child’s Language,” “Ethnicity,” and “State Race,” enter the information in the fields below. If you do enter this information, finalize your data entry by clicking on the blue “Save” button at the bottom of the modal.

Update Demographic Information

Language English	Ethnicity Hispanic or Latino	Federal Race Unknown
State Race White	Additional State Race N/A	Additional State Race N/A
Additional State Race N/A	Additional State Race N/A	Gender Unknown

DRDP-2015 Race categories
- Select -

Dual Language Learner
 Yes No

Is English the only language spoken at the child's home?
 Yes No

English Language Learner
 Yes No

Cancel Save

5

Repeat this process if you have another child/student that will be participating. Once all of the children have been created, the initial family information input is complete!