Policies and Procedures

*Constituent Records*

# Head of Household

Per the [Head of Household Policy](POLICY%20-%20Head%20of%20Household.docx), the default Head of Household for a record is the one that was added to the database **first**. However, as we get to know a constituent household better, we may learn that another household member would make more sense. In this case, we are able to change the head of household by following these steps.

## Open the constituent record of the current Head of Household

## Select the button labeled ‘Spouse’ on the Bio 1 tab

## In the bottom left of the relationship record, under ‘This individual is the:’ check the box for ‘Head of Household.”

## Check the box by ‘Head of Household’

## Save the relationship record.

## Add a note to both the head of household and the secondary household member, noting:

* 1. Who is the current head of household
  2. Who was the head of household
  3. When the switch took place
  4. Any background about why the change was made.