

MANAGING PERSON-LEVEL RELATIONSHIPS



Knowledge Base Article

Managing Person-Level Relationships

Table of Contents

<u>Overview</u>	<u>3</u>
<u>Managing Relationships within the Person Record</u>	<u>3</u>
<u>Editing Relationships</u>	<u>4</u>
<u>Adding Related Person</u>	<u>5</u>
<u>Creating New Person</u>	<u>7</u>
<u>Managing Relationships within a Case Record</u>	<u>8</u>
<u>Managing Relationships within an Adoption Case Record</u>	<u>10</u>
<u>Adding a Sibling</u>	<u>11</u>
<u>Creating New Person.....</u>	<u>13</u>
<u>Managing Relationships within the Provider Record.....</u>	<u>14</u>
<u>Genogram</u>	<u>16</u>

Managing Person-Level Relationships

Overview

This article shows how to view, create, and edit relationships between persons in SACWIS.

Managing Relationships within the Person Record

1. Navigate to the **Person Overview** screen for a specific person.
2. Click **Relationships**, in the navigation pane.

Person Overview			
Name:	Blue Crayon	Person ID:	17250770
DOB:	01/01/1980	Age:	37
Race:	Black/African American, White	Hispanic/Latino:	Yes
Gender:	Female		
Primary Contact			
Contact:	(222) 333-4444		
Address:	4200 E 9th AVE Columbus, OH 43219-1851		
Environmental Hazards:			

The **Manage Relationships - List** appears.

Note: The **Relationships List** displays all persons with an established relationship to the focus person. Each name and ID appearing in the **Relationships List** is a link to the listed individual's Person record.

Important: You can click the **Relationships** link (under an individual's name) to expand a drawer that displays the relationships of that individual to the other people listed. You can see a list of all relationships for the listed persons by clicking, **Expand all**.

Important: All individuals in the list set are, in some way, related to the focus person. If there are individuals in the list set who do not have relationships established with one another, SACWIS will display the link as **# unspecified relationships** instead of **Relationships** (the pound sign represents the number of unspecified relationships for the individual). Click the **# unspecified relationships** link to expand the drawer displaying that individual's relationships, including all unspecified relationships. The unspecified relationships will be denoted with an orange dot and orange text. **All persons in the list set are not necessarily related to one another, so not all relationships must be specified.**

Managing Person-Level Relationships

Editing Relationships

1. To edit relationships for the focus person and all individuals in the list set, click the **Editor** icon at the top of the page.

The screenshot shows the 'Manage Relationships - List' interface. At the top, there's a header with 'NAME / ID: Muffin, Blueberry / 237171' and 'Female Age 47, DOB 01/01/1970'. Below this is a toolbar with three icons: 'Editor' (circled in red), 'List', and 'Genogram'. To the right of the icons is a 'Sort By:' dropdown menu and a 'Sort' button. The main area is titled 'Relationship List' and contains a table of relationships. The table has columns for 'edit', 'Name', 'Age', 'DOB', and 'Relationships'. The first row shows 'Muffin, Blueberry / 237171' with 'Female Age 47, DOB 01/01/1970' and a dropdown menu for 'Relationships'. The second row shows 'Cake, Coffee / 17412814' with 'Male Age 79, DOB 08/05/1938' and a dropdown menu for '1 unspecified relationship'. The third row shows 'Muffin, Poppyseed / 16409871' with 'Male Age 49, DOB 01/01/1968' and a dropdown menu for '1 unspecified relationship'. The fourth row shows 'Muffin, Pumpkin / 17412813' with 'Female Age 5, DOB 05/05/2012' and a dropdown menu for '1 unspecified relationship'.

The **Manage Relationships - Editor** screen appears.

2. To record an unspecified relationship, or update an existing relationship value, make a selection from the drop-down menu under the focus person's name.

Important: The horizontal menu of names on the screen will allow you to update the relationships between one of the other persons in the list set and the other listed individuals. The arrows on either side of the menu allow you to navigate through the names in the list set.

Note: If the gender of the person has been specified on the person record, the values in the menu will be gender specific. When the relationship is selected, the reciprocal is automatically calculated, if possible, by the system.

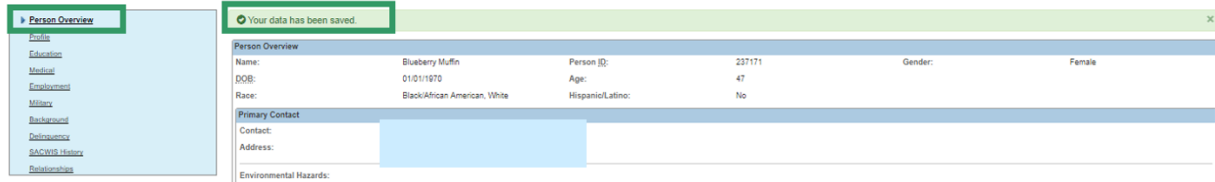
Important: To add a related person not already found in the list set, click **Add Related Person** and skip to the *Adding Related Person* instructions below.

3. After you have updated the desired relationships, and it *is not* necessary to add a related person, click **Save**.

The screenshot shows the 'Manage Relationships - Editor' interface. At the top, there's a header with 'NAME / ID: Muffin, Blueberry / 237171' and 'Female Age 47, DOB 01/01/1970'. Below this is a toolbar with three icons: 'Editor' (selected), 'List', and 'Genogram'. To the right of the icons is a 'Sort By:' dropdown menu and a 'Sort' button. The main area is titled 'Relationship Editor' and contains a form for adding or editing relationships. The form has a section for 'Need to add a relative to Muffin, Blueberry?' with a search bar and an 'Add Related Person' button. Below this is a table of relationships. The table has columns for 'Muffin, Blueberry / 237171', 'Cake, Coffee / 17412814', 'Muffin, Poppyseed / 16409871', and 'Muffin, Pumpkin / 17412813'. The first row shows 'Muffin, Blueberry / 237171' with 'Female Age 47, DOB 01/01/1970' and a dropdown menu for 'Cousin'. The second row shows 'Muffin, Blueberry / 237171' with 'Female Age 47, DOB 01/01/1970' and a dropdown menu for 'Wife'. The third row shows 'Muffin, Blueberry / 237171' with 'Female Age 47, DOB 01/01/1970' and a dropdown menu for '1 unspecified relationship'. The fourth row shows 'Muffin, Blueberry / 237171' with 'Female Age 47, DOB 01/01/1970' and a dropdown menu for '1 unspecified relationship'. The bottom of the screen has a dark bar with 'Apply', 'Save' (circled in red), and 'Cancel' buttons.

Managing Person-Level Relationships

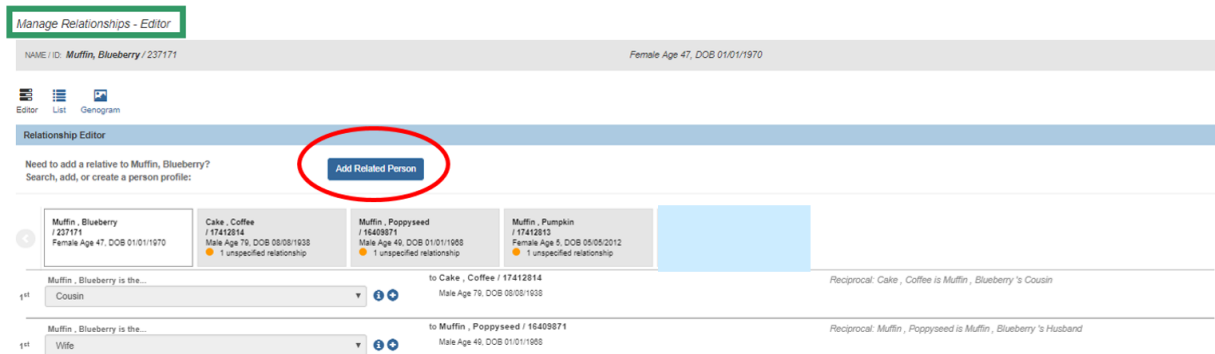
The **Person Overview** screen appears, displaying the message: **Your data has been saved.**



Adding Related Person

On the **Manage Relationships - Editor** screen:

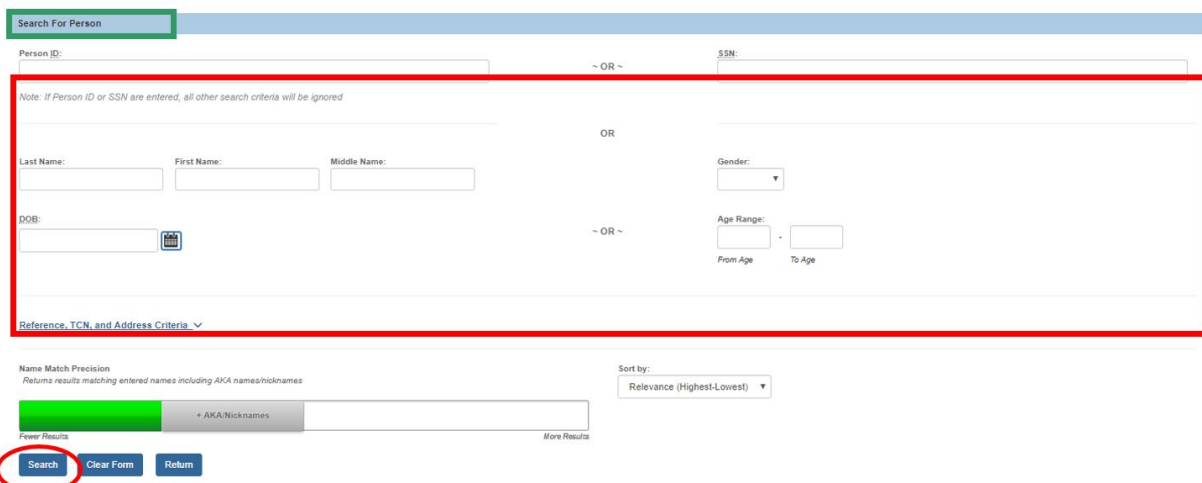
1. Click **Add Related Person**.



The **Search For Person** screen appears.

2. Enter search parameters.
3. Click **Search**.

Note: for additional assistance on searching, please see the Knowledge Base Article titled, [Using Search Functionality](#).



Managing Person-Level Relationships

The results appear in the **Person Search Results** section.

- Click **select**, by the appropriate individual's name.

Person Search Results

Result(s) 1 to 4 of 4 / Page 1 of 1

☐ Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
select	Muffin, Blueberry / 237171				
	Related Persons ▾				
select	Muffin, Poppyseed / 16409671				

Create New Person

Important: If the person does not already exist in SACWIS, go to the **Creating New Person** section below. If you choose select (as noted in the screen above), or you need to create a new person, either option will bring you to the **Manage Relationships - Editor** screen.

The **Manage Relationships - Editor** screen appears, with the added individual now displayed in the list. Select the relationship of the focus person to the newly added person from the drop-down menu under the name of the focus person.

- Click **Save**.

Important: If you do not specify a relationship between the focus person and the newly added person prior to saving the record, that added person will no longer display in the relationships list for this focus person. Likewise, if a person should be removed from the list, for example, if a relationship was recorded in error, simply delete the value in the relationship drop-down menu and click **Save**.

Manage Relationships - Editor

NAME / ID: Muffin, Blueberry / 237171 Female Age 47, DOB 01/01/1970

Editor List Diagram

Relationship Editor

Need to add a relative to Muffin, Blueberry?
Search, add, or create a person profile: **Add Related Person**

Muffin, Blueberry / 237171
Female Age 47, DOB 01/01/1970

Coke, Coffee / 17412814
Male Age 79, DOB 05/05/1938
2 unspecified relationships

Muffin, Poppyseed / 16409671
Male Age 49, DOB 01/01/1988
2 unspecified relationships

Muffin, Pumpkin / 17412813
Female Age 5, DOB 05/05/2012
2 unspecified relationships

Muffin, Blueberry is the...
to Coke, Coffee / 17412814
Male Age 79, DOB 05/05/1938

Muffin, Blueberry is the...
to Muffin, Poppyseed / 16409671
Male Age 49, DOB 01/01/1988

Apply **Save** Cancel

Managing Person-Level Relationships

Creating New Person

When a search for person does not return the desired results because the person does not exist in SACWIS:

1. Click **Create New Person** on the **Search For Person** screen.

Search For Person

Person ID: ~ OR ~ SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name: First Name: Middle Name: Gender:

DOB: Age Range: From Age: To Age:

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort by: Relevance (Highest/Lowest)

Person Results More Results

Person Search Results

No Results Returned

The **Person Profile** screen appears, displaying the **Basic** tab.

2. Complete the required information (denoted with a red asterisk), and any other available information.
3. Click **Save**.

Basic Demographics Address Additional Characteristics Safety Hazard

Name: Person ID: DOB:

Hazards/Alert Information

☐ Safety Hazard Exists ☐ Safety Plan Exists ☐ Environmental Hazard Exists ☐ Protective Service Alert

☐ APOA ☐ Pregnant ☐ Pregnant/Parenting Minor ☐ Pregnant/Parenting Youth in Custody

Person Information

Prefix: First Name: Middle Name: Suffix:

Last Name: Gender: SSN: ☐ Estimated DOB ☐ Retain ☐ Admit ☐ DOB Unknown

DOB: Age: ☐ Deceased ☐ Deceased Date: Age At Time Of Death: ☐ Deceased Date Unknown

Driver's License #: Issue State: Expiration:

AKA Names

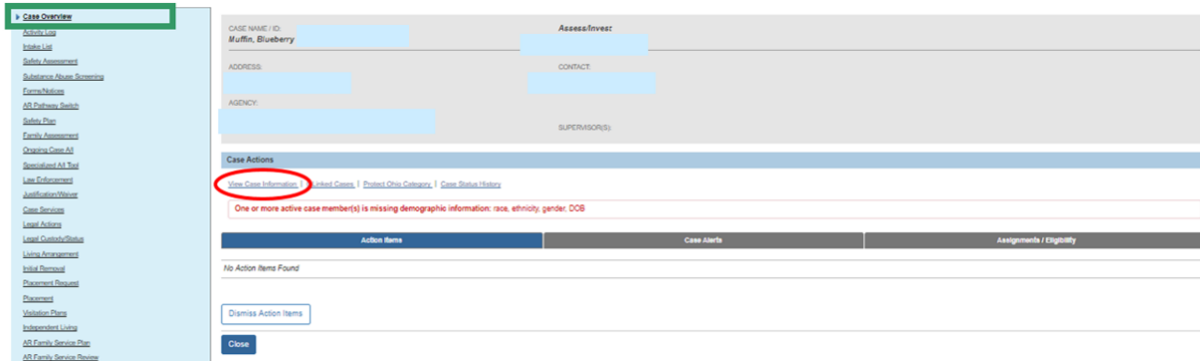
Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type
<input type="button" value="Add AKA"/>					

Managing Person-Level Relationships

Managing Relationships within a Case Record

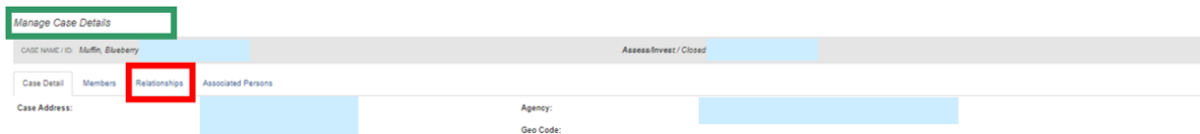
Navigate to the **Case Overview** record.

1. Click **View Case Information**.



The **Manage Case Details** screen appears.

2. Click the **Relationships** tab.



The **Case Member Relationship Summary** section appears. The list set defaults to **Active Members**.

Note: The drop-down menu under **Member Status** allows the selection of **Active Members**, **All Members**, and **All Members and Related Associated Persons**. The selection made will determine what names appear in the **Case Member Relationship Summary** list set.

Note: You can click the **Relationships** link under an individual's name to open a drawer that lists the relationship of that individual to the other Case Members and/or Related Associated Persons. Related Associated Persons are persons with an association value that indicates the person has a non-professional relationship with the family. For example, those with an association of Relative or Parent will display so their specific relationships to the family members can be recorded. Associated Persons such as WWK worker or GAL will not display in the relationships list.

Each name and ID appearing in the relationship list is a link to the listed individual's Person Overview record.

3. To change the filter, make a selection from the **Member Status** drop-down menu.
4. Click **Filter**.

Managing Person-Level Relationships

- Click **Editor** to record or update relationships as needed (or, click **edit** beside a specific person's name).

Manage Case Details

CASE NAME / ID: Crayon, Blue / 39673962 Assess/Invest / Open (09/01/2017)

Case Detail Members Relationships Associated Persons

Editor Genogram Member Status: Active Members Filter

Case Member Relationship Summary

Expand All

edit	Crayon_Red / 17469779	Male Age 35, DOB 02/02/1982
edit	Crayon_Blue / 17469772	Female Age 33, DOB 04/04/1984
edit	Marker_Orange / 17469782	Female Age 13, DOB 04/04/2004

Note: If you use the *Editor* button, the first person listed in the Case Member Relationship Summary will be highlighted on the following screen (*Manage Relationships - Editor* screen); by selecting *edit*, beside an individual's name, that specific person will be highlighted on the Manage Relationships - Editor screen.

The **Manage Relationships – Editor** screen appears.

- Record any unspecified relationships, as needed, by making a selection from the relevant drop-down menu(s).
- Click **Save**.

Manage Relationships - Editor

CASE NAME / ID: Crayon, Blue / 39541962 Assess/Invest / Open (10/02/2017) HAZARD

Member Status: All Members and Related Associated Persons Filter

Relationship Editor

Crayon_Red / 17250771 Male Age 43, DOB 04/04/1974 1 unspecified relationship	Crayon_Blue / 17250770 Female Age 37, DOB 01/01/1980 2 unspecified relationships	5 unspecified relationships	Crayon_Periwinkle / 17250770 Male Age 5, DOB 02/02/2012 1 unspecified relationship	Crayon_Purple / 17250772 Female Age 2, DOB 05/05/2015 2 unspecified relationships	Highlighter_Green / 17250769 Male 3 unspecified relationships
Crayon_Blue is the... to Crayon_Red / 17250771 Wife Male Age 43, DOB 04/04/1974 Reciprocal: Crayon_Red is Crayon_Blue's Husband					
Crayon_Blue is the... to Crayon_Periwinkle / 17250770 Biological Mother Male Age 5, DOB 02/02/2012 Reciprocal: Crayon_Periwinkle is Crayon_Blue's Biological Son					
Crayon_Blue is the... to Crayon_Purple / 17250772 Biological Mother Female Age 2, DOB 05/05/2015 Reciprocal: Crayon_Purple is Crayon_Blue's Biological Daughter					
Crayon_Blue is the... to Highlighter_Green / 17250769 Male					

Apply Save Cancel

The **Manage Case Details** screen appears with the Relationships tab in view, displaying the following message: **Your data has been saved.**

Your data has been saved.

Case / Workload / Case Information

Manage Case Details

CASE NAME / ID: Crayon, Blue / 39541962 Assess/Invest / Open (10/02/2017) HAZARD

Case Detail Members Relationships Associated Persons

Editor Genogram Member Status: Active Members Filter

Case Member Relationship Summary

Managing Person-Level Relationships

Managing Relationships within an Adoption Case Record

1. Navigate to the adoption **Case Overview** screen.
2. Click **View Member Details**.

Case Overview

Activity Log
Attorney Communication
Intake List
Forms/Notes
Substance Abuse Screening
Original Case A/I
Specialized A/I Tool
Law Enforcement
Justification/Waiver
Case Services
Legal Actions
Legal Custody/Status
Living Arrangement

CASE NAME / ID: Crayon, Periwinkle / 39543962 Adoption Open (10/02/2017)

ADDRESS: CONTACT:

AGENCY: Any County Department of Job and Family Services

PRIMARY WORKER: Assign Primary Worker SUPERVISOR(S):

Case Actions

[View Member Details](#) [Access Original Case](#) | [Protect Ohio Category](#) | [Case Status History](#)

The **Manage Member Details** screen appears.

3. Click the **Relationships** tab.

Manage Member Details

CASE NAME / ID: Crayon, Periwinkle / 39543962 Adoption / Open (10/02/2017)

Adoption Members A/I Members **Relationships** Adoption Details Associated Persons

Adoption Members Details

Active Adoption Members List

Warning: Changing the Case Reference Person will change the Case Name and Case Address

CRP	Person ID	Name	DOB	Age	Gender	Race	Hispanic/Latino	Begin Date
17256770	Crayon, Periwinkle	02/02/2012	5	Male	Black/African American, White	Yes	10/02/2017	

The **Manage Relationships** screen appears, displaying the Relationships list. The list set defaults to include only the **Active Adoption Members** of the case. Other options include:

- Adoption Members and A/I Members
- All Adoption Members
- Adoption Members and Siblings
- Adoption Members and Related Associated Persons

Note: This list page functions similarly to the Relationships List accessed in non-adoption Case records. In the Adoption Case context, the list set is limited to persons connected to the Adoption Case. When Adoption Members and Siblings is selected, the list set will include all active and inactive members of the case as well as all persons with a relationship value that is defined as a sibling (Biological Brother/Sister, Adoptive Brother/Sister, Half Brother/Sister, Step Brother/Sister) to any of the members.

Managing Person-Level Relationships

4. Select **Adoption Members and Siblings** from the **Member Status** drop-down Menu.
5. Click **Filter**.

The screenshot shows the 'Manage Relationships' header. Below it, the 'CASE NAME / ID' is 'Adoption / Open'. The 'Adoption Members' tab is selected. The 'Member Status' dropdown is set to 'Adoption Members and Siblings', and the 'Filter' button is highlighted. The 'Adoption Relationship Information' section is expanded, showing a table with one row and an 'edit' link.

The **Adoption Relationship Information** section expands, adding the name(s) of any siblings.

6. Click the **Editor** icon.

This screenshot is similar to the previous one, but the 'Editor' icon (a small blue square with a white 'E') is highlighted. The 'Member Status' dropdown is still set to 'Adoption Members and Siblings', and the 'Filter' button is still highlighted. The 'Adoption Relationship Information' section is expanded, showing a table with one row and an 'edit' link.

The **Manage Relationships - Editor** screen appears.

Adding a Sibling

1. Click **Add Sibling** to add other siblings who are not members of the Adoption Case.

The screenshot shows the 'Manage Relationships - Editor' header. Below it, the 'CASE NAME / ID' is 'Crayon, Periwinkle / 39543962'. The 'Adoption / Open (10/02/2017)' tab is selected. The 'Member Status' dropdown is set to 'Active Adoption Members', and the 'Filter' button is highlighted. The 'Relationship Editor' section is expanded, showing a table with one row and an 'Add Sibling' button. The table row contains the text 'Crayon, Periwinkle / 17256770 Male Age 5, DOB 02/02/2012'.

Managing Person-Level Relationships

The **Search For Person** screen appears.

2. Enter search criteria.
3. Click **Search**.

Search For Person

Person ID: - OR - SSN:

Note: If Person ID or SSN are entered, all other search criteria will be ignored

OR

Last Name: First Name: Middle Name: Gender:

DOB: Age Range: -

From Age To Age

Reference, TCN, and Address Criteria

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Sort by:

The **Person Search Results** section appears.

4. Click **select** beside the appropriate person's name.

Person Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

☐ Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
<input type="button" value="select"/>	Crayon, green / 17310001				

[Related Persons v](#)

Important: If, after searching, you determine the correct person does not already exist in SACWIS, see **Creating a New Person** instruction below.

The **Manage Relationships - Editor** screen appears, displaying the additional person in the list set.

5. Make a selection from the drop-down menu under the name of the focus person.
For sibling relationships, a checkbox displays, allowing the newly added person to be included in the Sibling Group for purposes of adoptive placement when this child also has a legal status of Permanent Custody.
6. Place a checkmark in the checkbox beside **Include in Sibling Group**.
7. Click **Save**.

Managing Person-Level Relationships

The **Manage Relationships** screen appears, displaying the following message: **Your data has been saved.**

Creating New Person

Note: If the sibling you wish to add cannot be found via person search because they do not have an existing person record:

1. Click **Create New Person** on the **Search for Person** screen.

Managing Person-Level Relationships

The **Person Information** screen appears.

Note: The name previously used to search is automatically added.

2. Fill in additional information, if available.
3. Click **Save**.

The screenshot shows the 'Person Information' screen with the following details:

- Name:** First Name: Green, Last Name: Crayon
- Person ID:** 17275770
- DOB:** [Field]
- Gender:** [Field]
- Age:** [Field]
- Deceased Date:** [Field]
- Issue State:** [Field]
- Expiration:** [Field]
- AKA Names:** Table with columns: Prefix, First Name, Middle Name, Last Name, Suffix, AKA Type
- Buttons:** Apply, Save, Cancel

The **Person Overview** screen appears with the following message: **Your data has been saved.**

4. Click **Close**.

The screenshot shows the 'Person Overview' screen with the following details:

- Message:** Your data has been saved.
- Person Overview:** Name: Orange Crayon, Person ID: 17275772, Gender: [Field]
- Primary Contact:** Contact: [Field], Address: [Field], Environmental Hazards: [Field]

Note: Upon closing, the newly created person will be returned to the Adoption Case Manage Relationships - Editor page so the relationship can be recorded.

Managing Relationships within the Provider Record

1. Navigate to the **Provider Overview** page.
2. Click **Provider Information**.

The screenshot shows the 'Provider Overview' screen with the following details:

- Message:** Your data has been saved.
- Provider Overview:** PROVIDER NAME / ID: [Field], CATEGORY / STATUS: Home / Closed
- Provider Actions:** Provider Information (highlighted)

Managing Person-Level Relationships

The **Manage Provider Details** screen appears.

3. Click the **Relationships** tab.

The screenshot shows the 'Manage Provider Details' screen. At the top, there's a header bar with 'PROVIDER NAME / ID:' and 'CATEGORY: Non-ODJFS'. Below this is a tabbed interface with 'Basic', 'Address', 'Members', 'Relationships', and 'Capacity'. The 'Relationships' tab is highlighted with a red circle. Below the tabs is a section titled 'Provider Name Information'.

The **Provider Member Relationship Summary** section appears.

Note: The Member Status list set defaults to **Active Members**; however, user can select All Members from the drop-down menu, and then click **Filter** to change the list set.

4. Click the **Editor** icon to record or update relationships as needed.

This screenshot shows the 'Provider Member Relationship Summary' section. It includes a 'Member Status:' dropdown set to 'Active Members' and a 'Filter' button. Below this is a list of relationships, each with an 'edit' icon and a status of '1 unspecified relationship'. The 'Editor' icon in the top left of this section is circled in red. A note at the top says 'Note: Displaying current person relationships below.' and there is an 'Expand all' link.

The **Manage Relationships - Editor** screen appears.

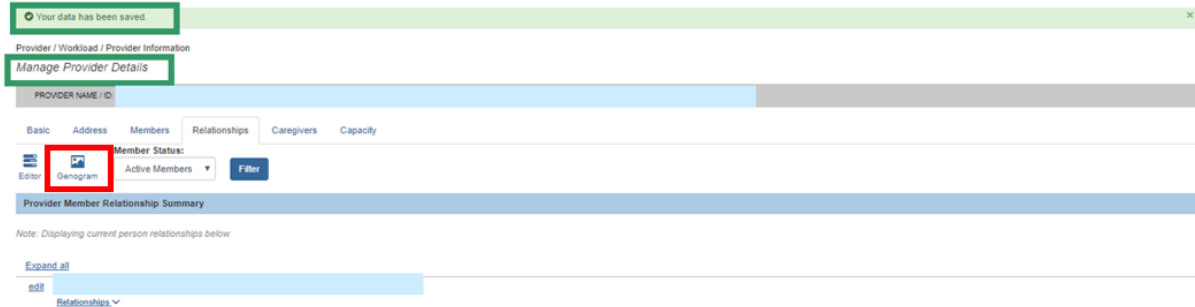
5. Select the applicable value from the drop-down menu to record or update a relationship.
6. Click **Save**.

The screenshot shows the 'Manage Relationships - Editor' screen. It features a 'Relationship Editor' section with two boxes, each containing '1 unspecified relationship'. Below these is a dropdown menu labeled 'is the...' and a 'to' field. At the bottom, there are three buttons: 'Apply', 'Save' (circled in red), and 'Cancel'.

Managing Person-Level Relationships

The **Manage Provider Details** screen appears, displaying the following message: **Your data has been saved.**

1. Click the **Genogram** icon.

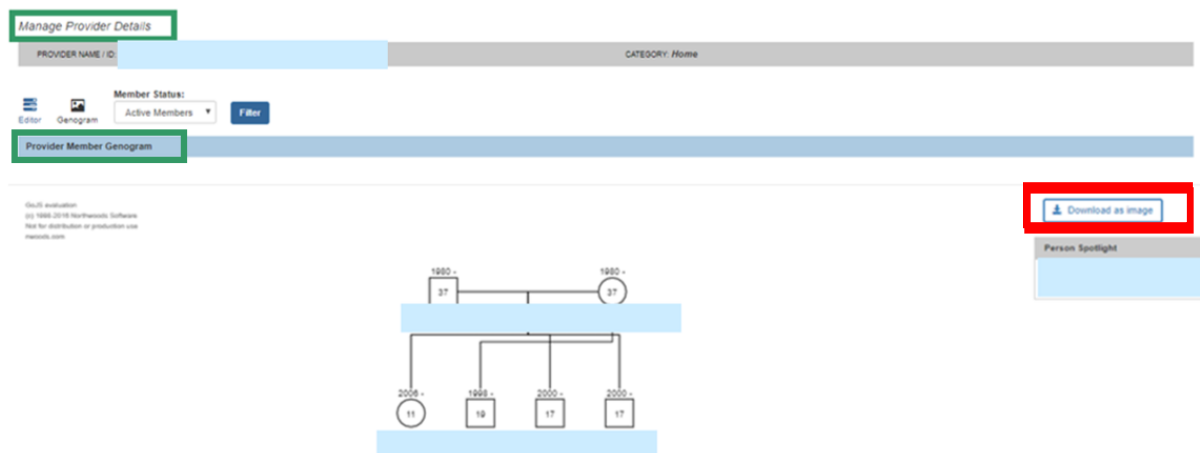


The **Manage Provider Details** screen appears, displaying the **Provider Member Genogram**.

The Genogram

The **Genogram** is a pictorial display of the relationships between the focus person and related persons or members. The Genogram icon appears near the top of the page within the Person, Case, and Provider contexts.

Note: You can download the Genogram image by clicking **Download as image**.

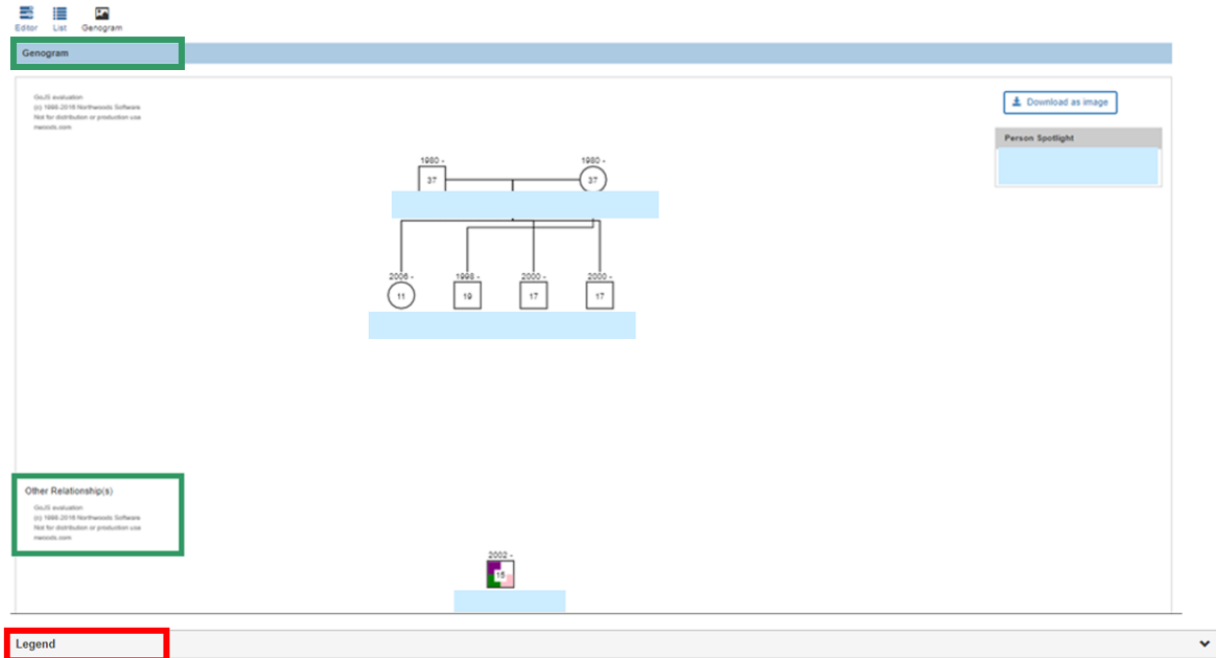


Note: The Genogram displays with the focus person highlighted. You can click on any person listed in the Genogram to change the focus. Information about the person in focus is displayed in the **Person Spotlight** grid. When you click an individual's name in the Genogram, the information in the Person Spotlight will be specific to the selected person. The persons displayed in the Genogram are limited to those in the Relationships list set, depending on the context and filter selected. For example, in the Case context, with Active Members in the list set, the Genogram will display only the Active Members.

Managing Person-Level Relationships

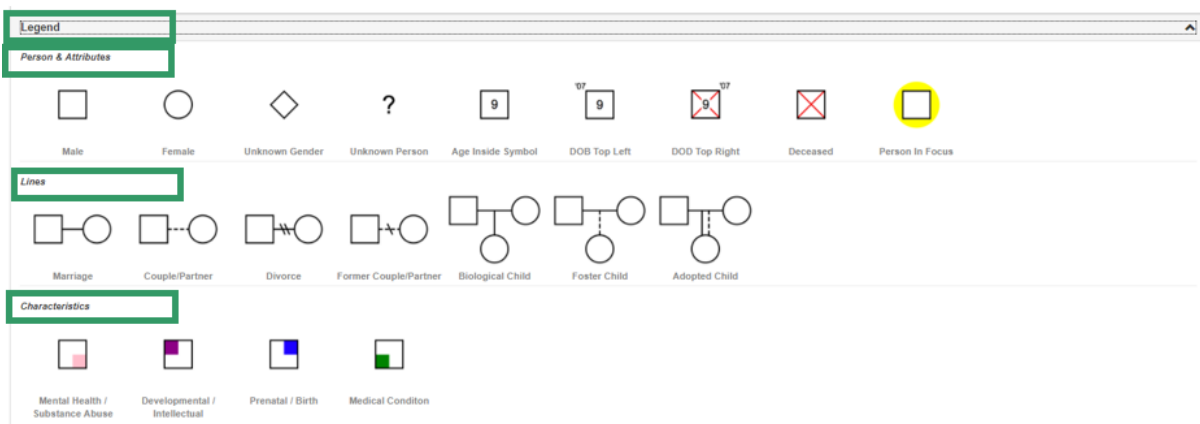
Important: Any person within the list set that has an unspecified relationship, or a relationship that cannot be drawn by the system and therefore cannot be included on the diagram, will be shown at the bottom of the diagram under “**Other Relationship(s).**”

2. Click **Legend**.



The graphic expands to display the **Legend**. The Legend explains the geometric symbols used in the Genogram that describe:

- Person & Attributes (e.g., gender, age, date of birth).
- Lines (relationships)
- Characteristics (medical and mental health issues)



If you need additional assistance, please contact the SACWIS Help Desk.