MANAGING PERSON-LEVEL RELATIONSHIPS

Knowledge Base Article

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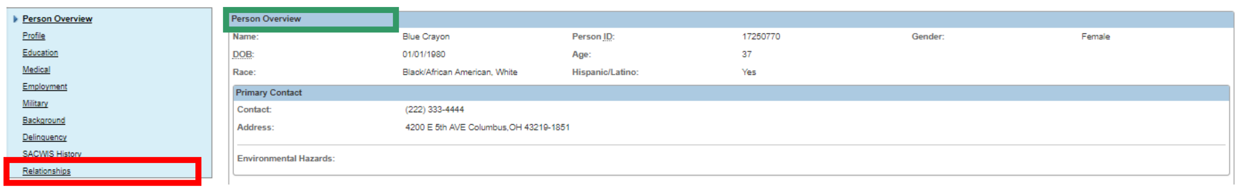
Overview

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.



The **Manage Relationships - List** appears.

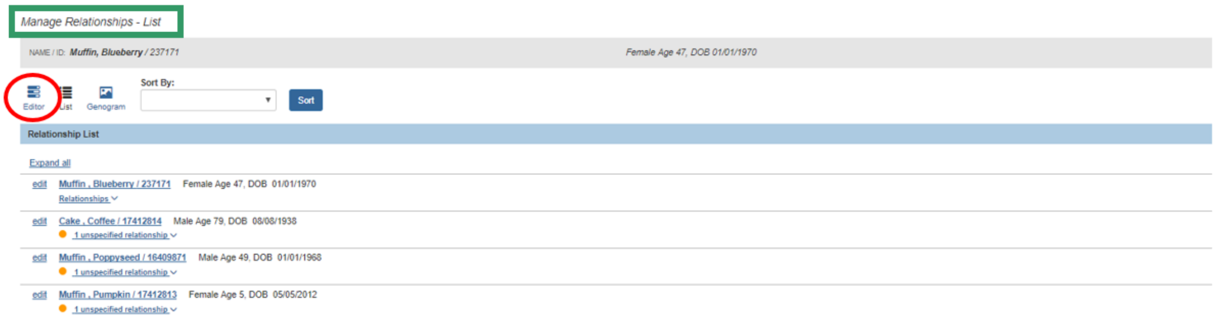
Note: The **Relationships List** displays all persons with an established relationship to the focus person. Each name and ID appearing in the **Relationships List** is a link to the listed individual's Person record.

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.**

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 **Manage Relationships - Editor** screen appears.

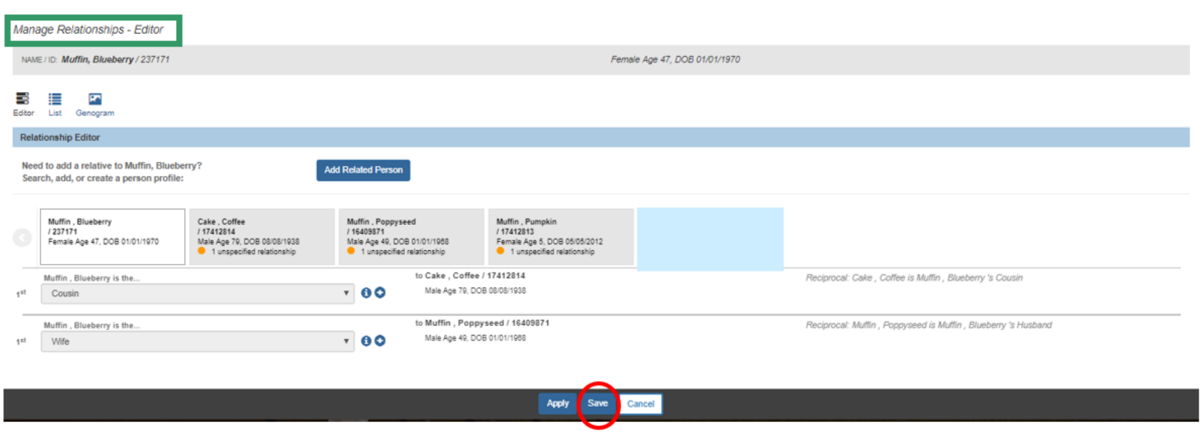
2. To record an unspecified relationship, or update an existing relationship value, make a selection from the drop-down menu under the focus person's name.

   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.

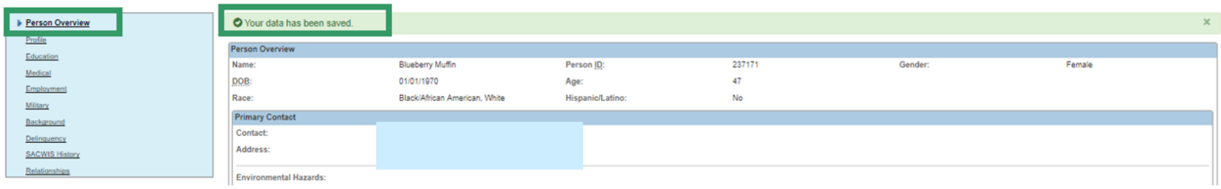
Important: To add a related person not already found in the list set, click **Add Related Person** and skip to the *Adding Related Person* instructions below.

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



Managing Person-Level Relationships

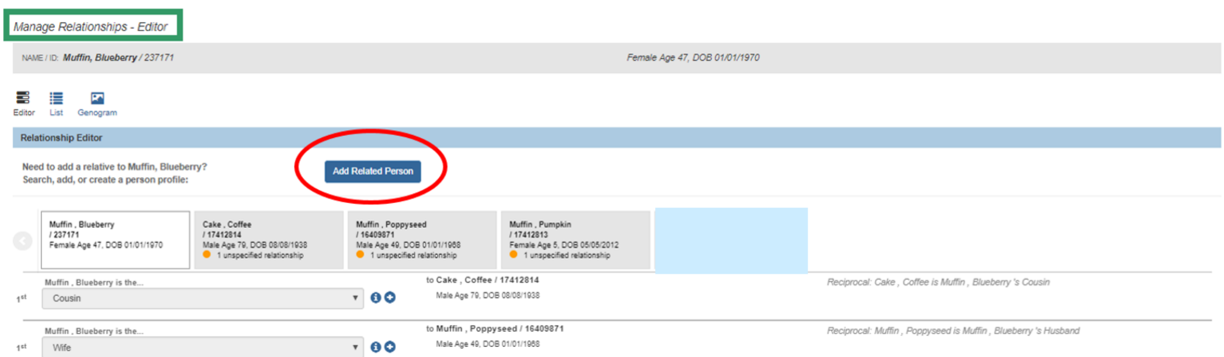
The **Person Overview** screen appears, displaying the message: **Your data has been saved**.



Adding Related Person

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

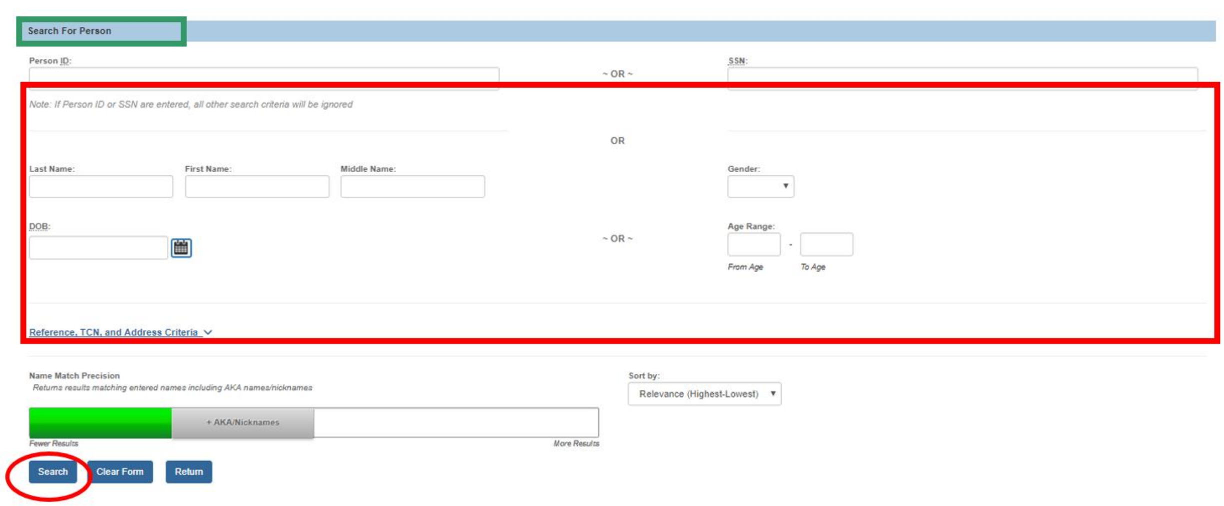
1. Click **Add Related Person**.



The **Search For Person** screen appears.

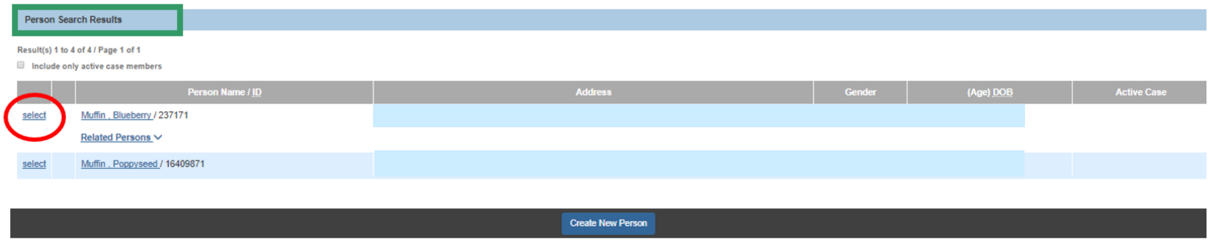
2. Enter search parameters.
3. Click **Search**.

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



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

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

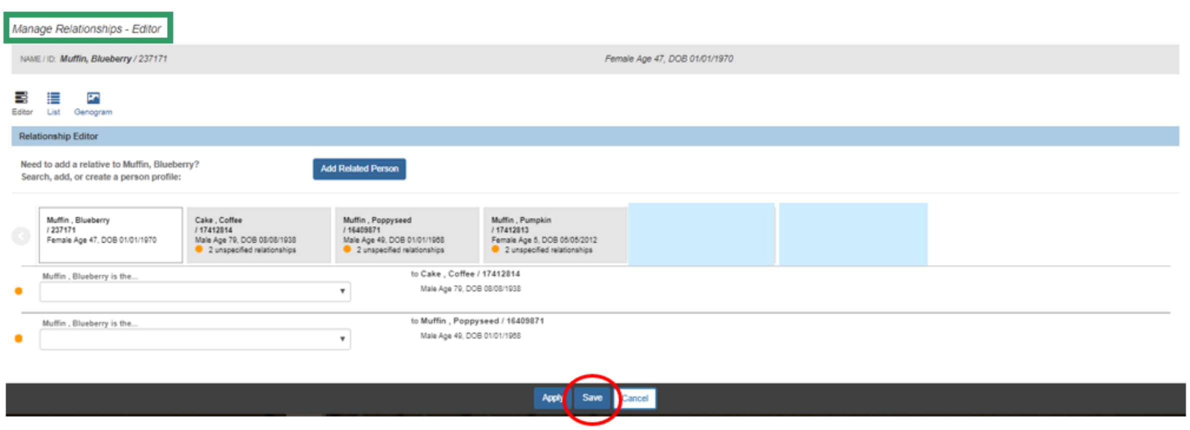


Important: If the person does not already exist in SACWIS, go to the **Creating New Person** section below. If you choose select (as noted in the screen above), or you need to create a new person, either option will bring you to the **Manage Relationships - Editor** screen.

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.

5. Click **Save**.

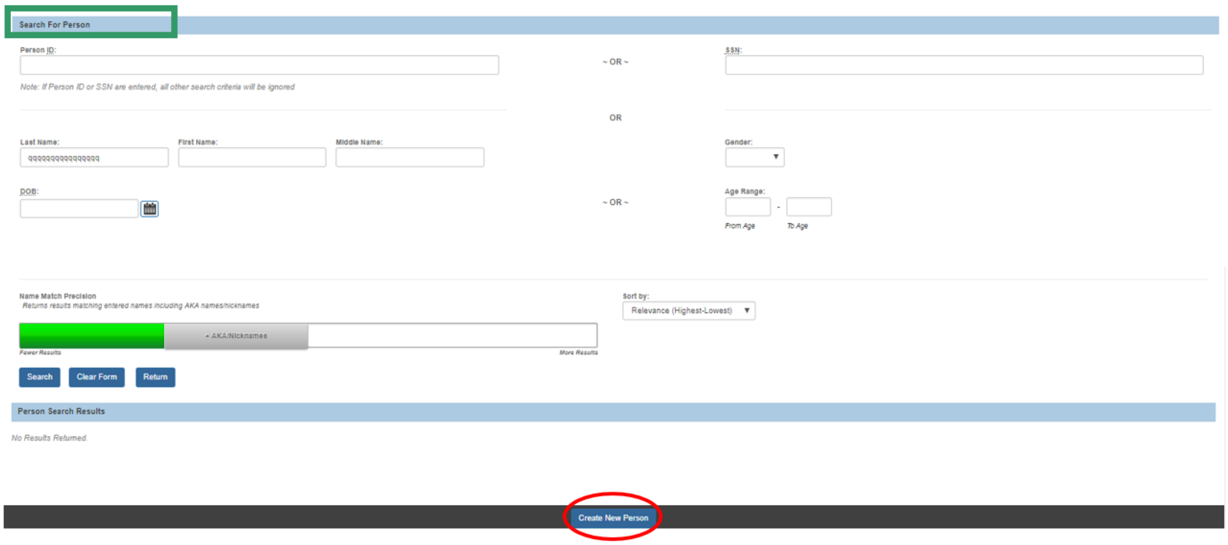
Important: If you do not specify a relationship between the focus person and the newly added person prior to saving the record, that added person will no longer display in the relationships list for this focus person. Likewise, if a person should be removed from the list, for example, if a relationship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



Creating New Person

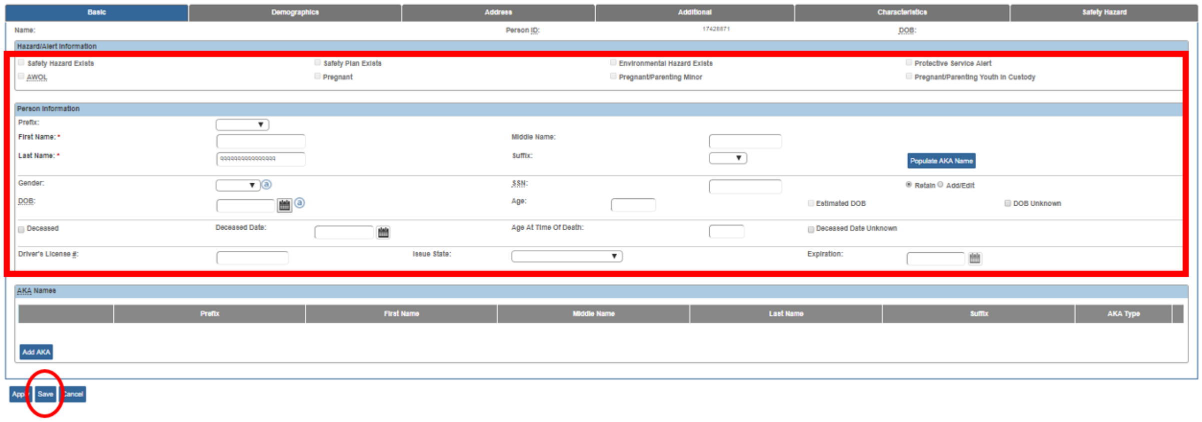
When a search for person does not return the desired results because the person does not exist in SACWIS:

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



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

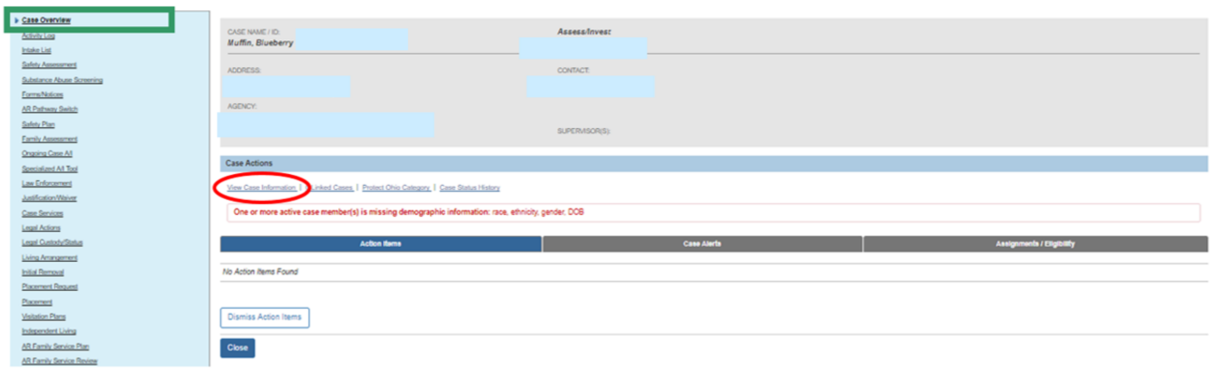
2. Complete the required information (denoted with a red asterisk), and any other available information.
3. Click **Save**.



Managing Relationships within a Case Record

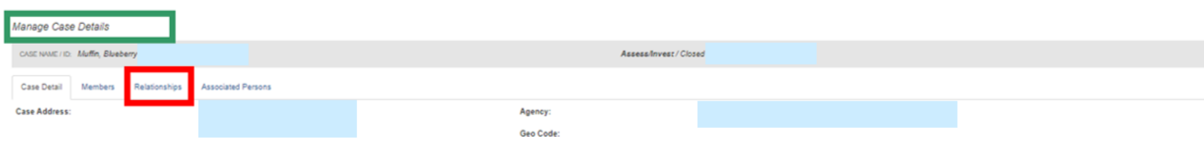
Navigate to the **Case Overview** record.

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**.

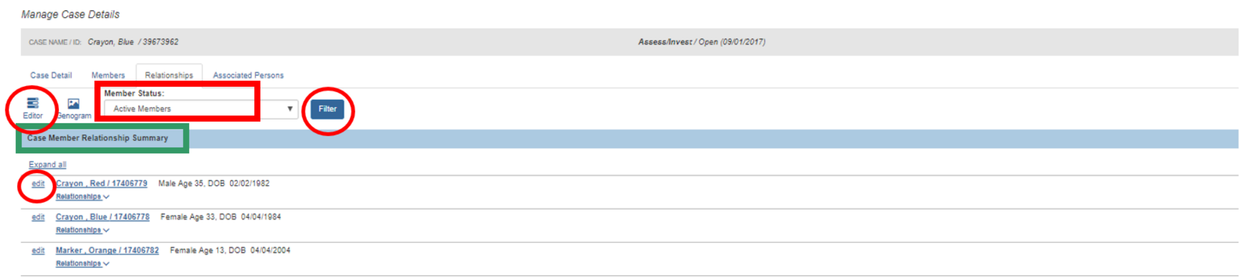
> **Note**: The drop-down menu under **Member Status** allows the selection of **Active Members**, **All Members**, and **All Members and Related Associated Persons**. The selection made will determine what names appear in the **Case Member Relationship Summary** list set.

> **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**.

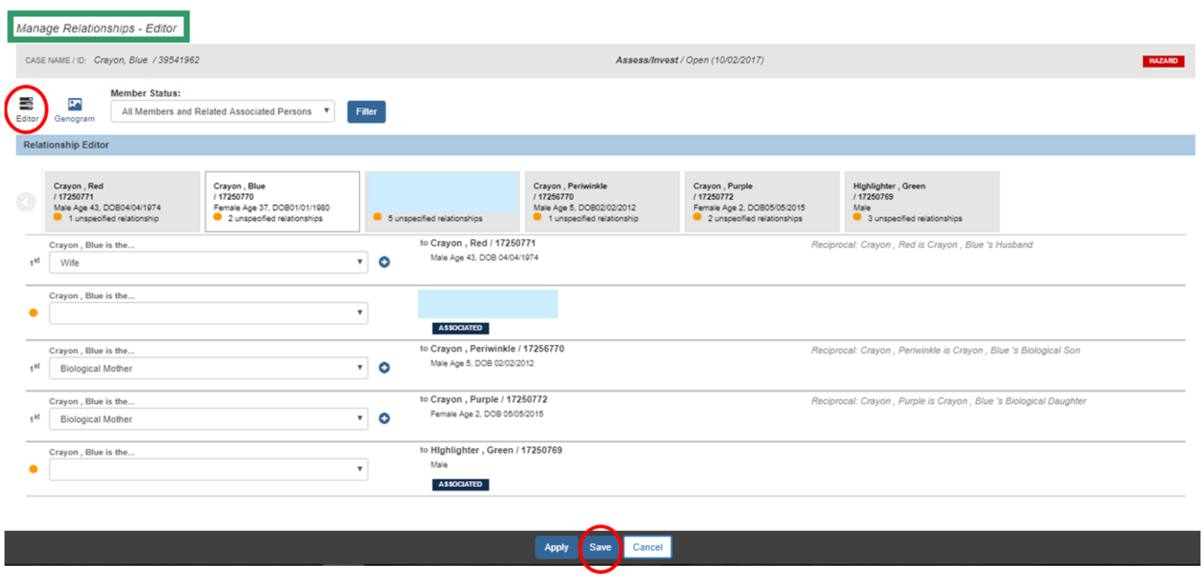
5. Click **Editor** to record or update relationships as needed (or, click **edit** beside a specific person's name).



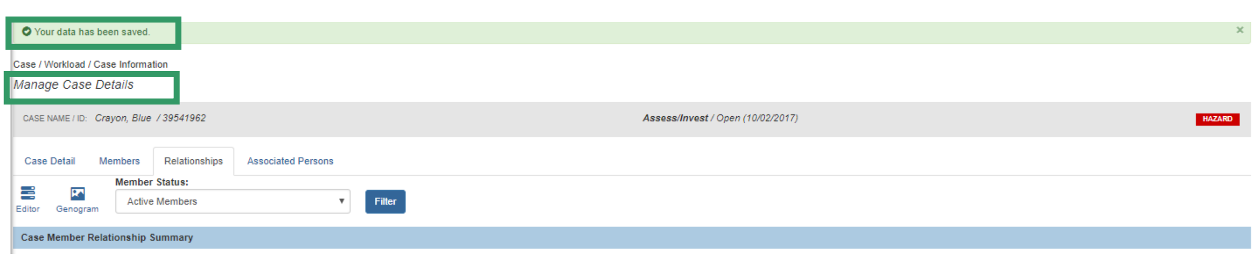
Note: If you use the *Editor* button, the first person listed in the Case Member Relationship Summary will be highlighted on the following screen (*Manage Relationships - Editor* screen); by selecting *edit*, beside an individual's name, that specific person will be highlighted on the Manage Relationships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

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

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



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

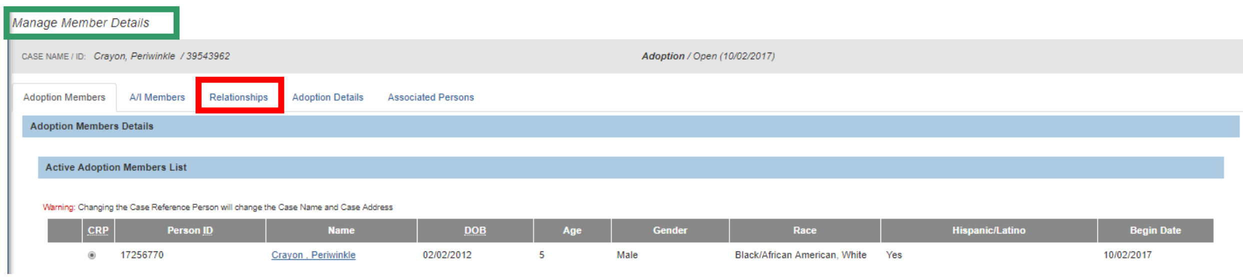


Managing Relationships within an Adoption Case Record

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

The **Manage Member Details** screen appears.

3. Click the **Relationships** tab.

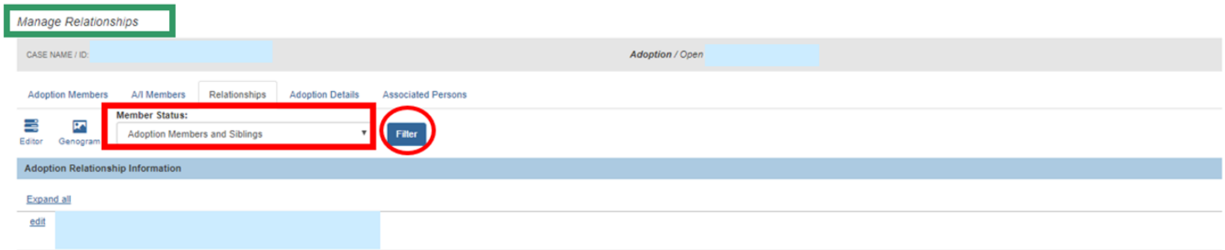


The **Manage Relationships** screen appears, displaying the Relationships list. The list set defaults to include only the **Active Adoption Members** of the case. Other options include:

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

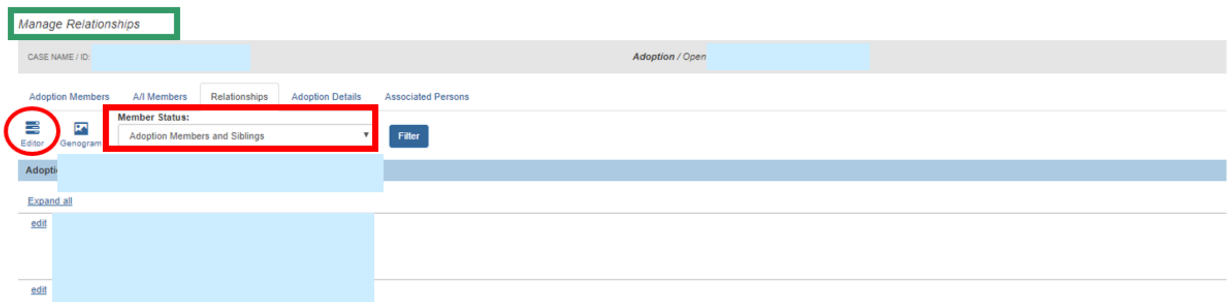
Note: This list page functions similarly to the Relationships List accessed in non-adoption Case records. In the Adoption Case context, the list set is limited to persons connected to the Adoption Case. When Adoption Members and Siblings is selected, the list set will include all active and inactive 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.

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



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

6. Click the **Editor** icon.



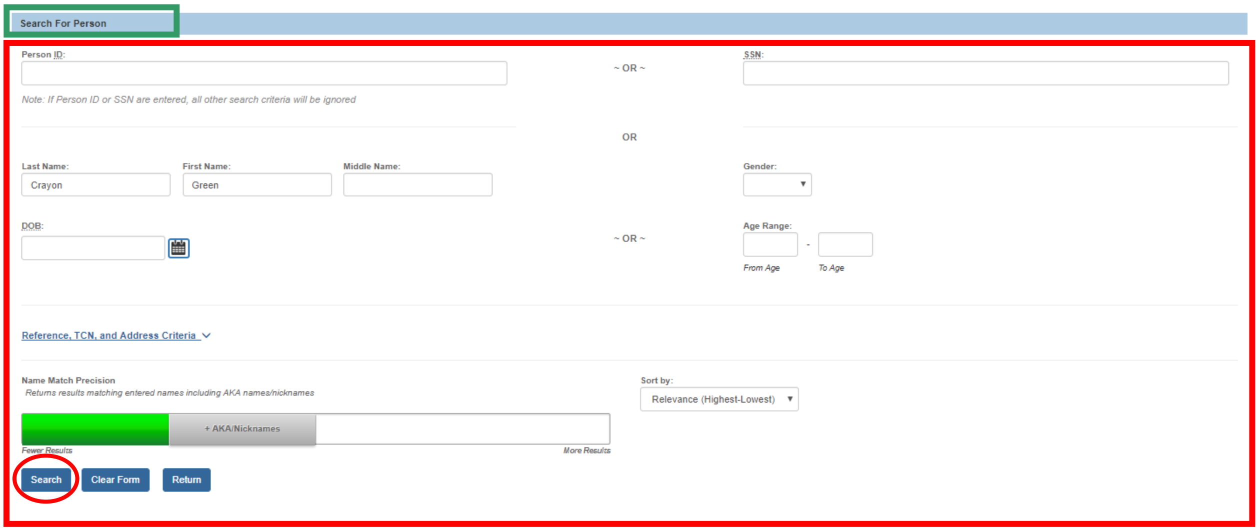
The **Manage Relationships - Editor** screen appears.

Adding a Sibling

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

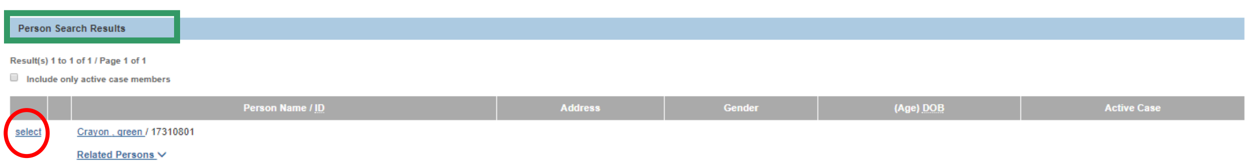
The **Search For Person** screen appears.

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



The **Person Search Results** section appears.

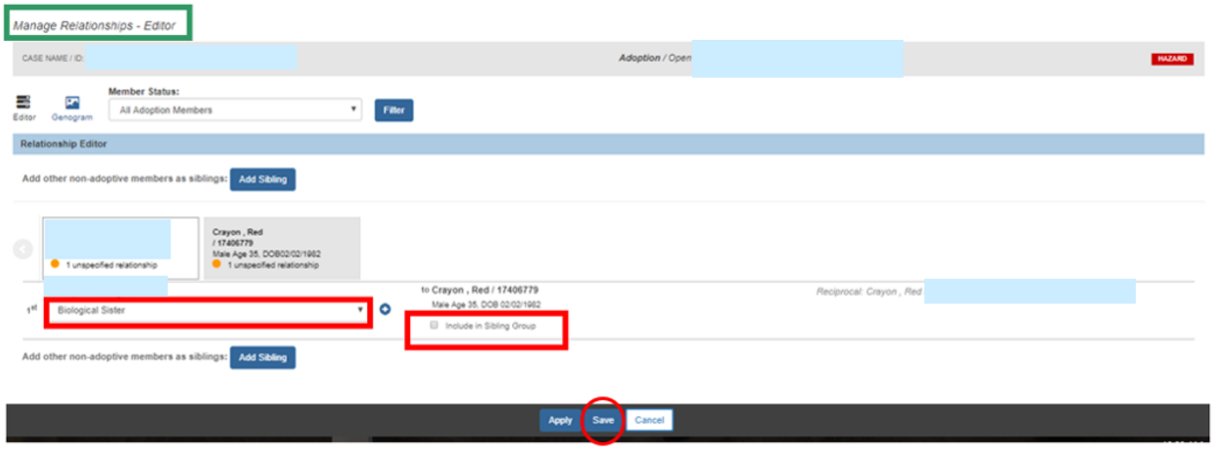
4. Click **select** beside the appropriate person's name.



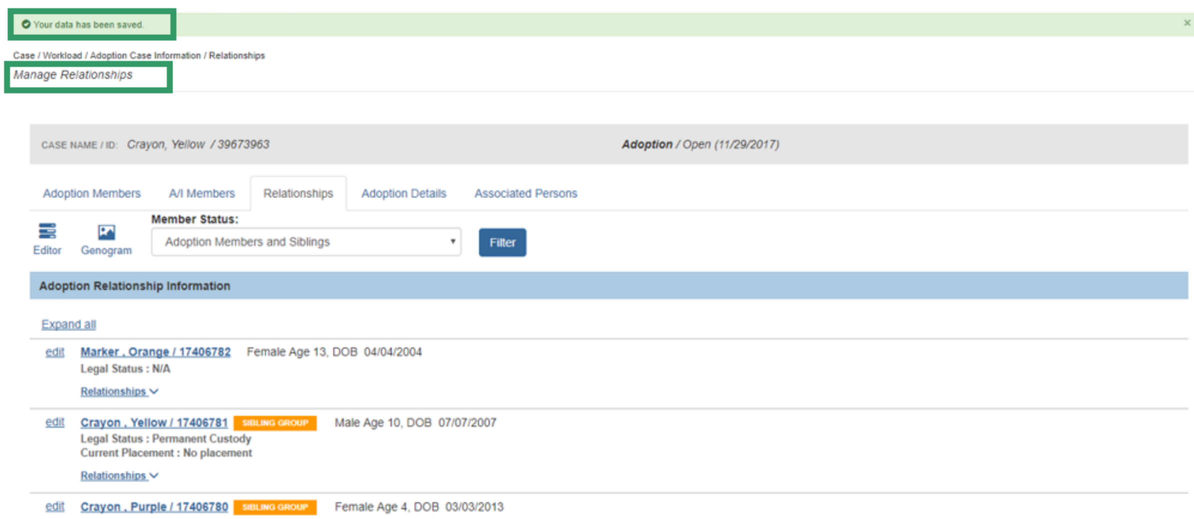
Important: If, after searching, you determine the correct person does not already exist in SACWIS, see **Creating a New Person** instruction below.

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**.



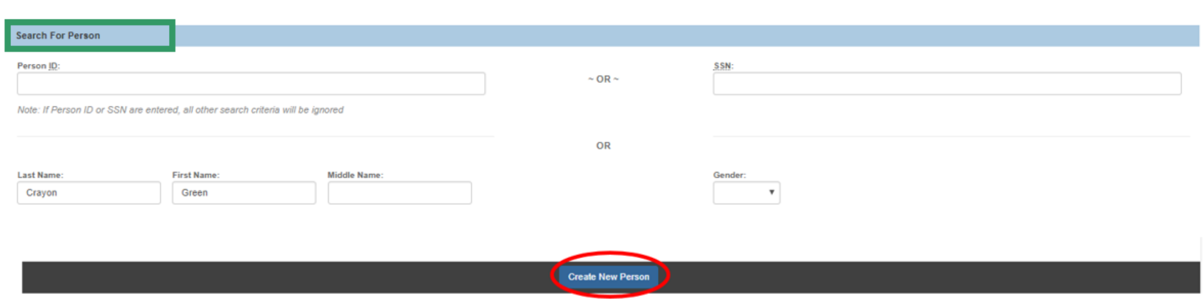
The **Manage Relationships** screen appears, displaying the following message: **Your data has been saved**.



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:

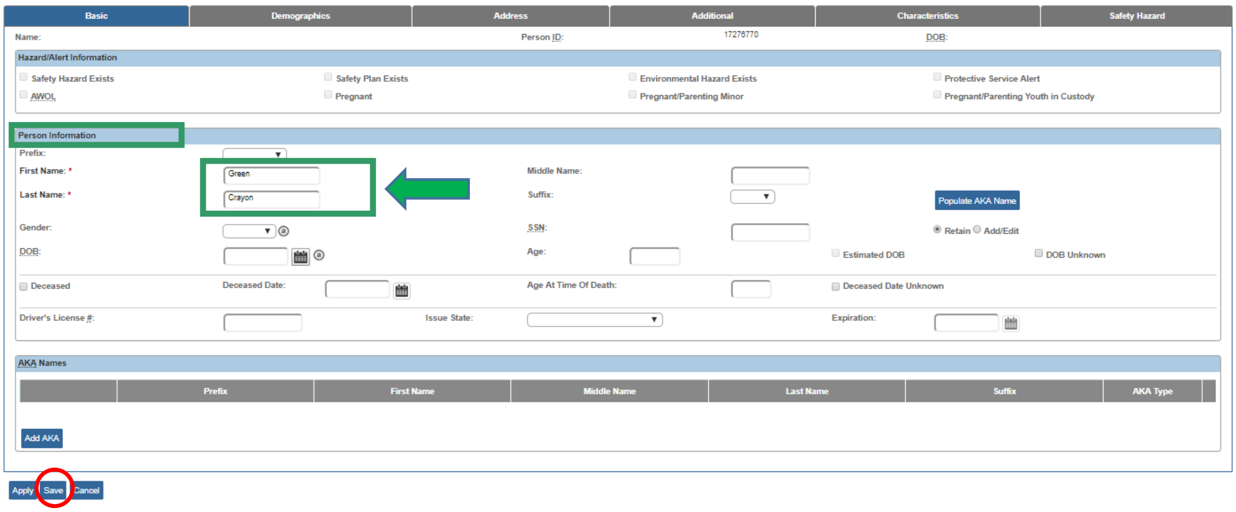
1. Click **Create New Person** on the **Search for Person** screen.



The **Person Information** screen appears.

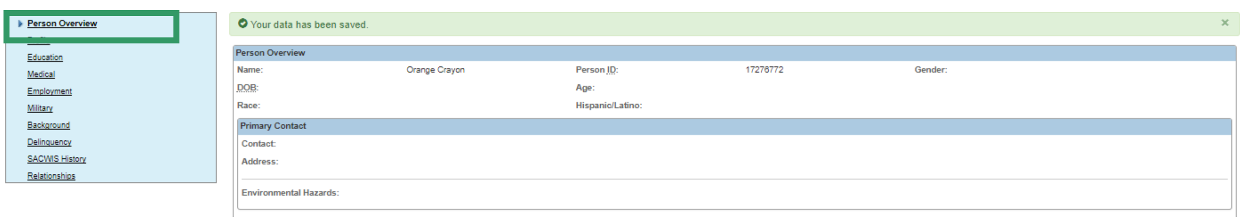
Note: The name previously used to search is automatically added.

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



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

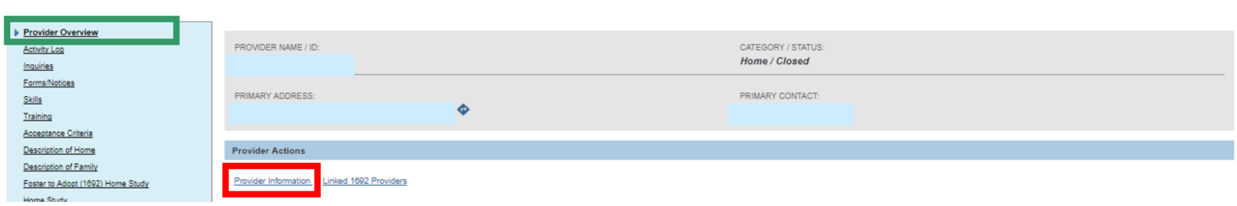
4. Click **Close**.



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

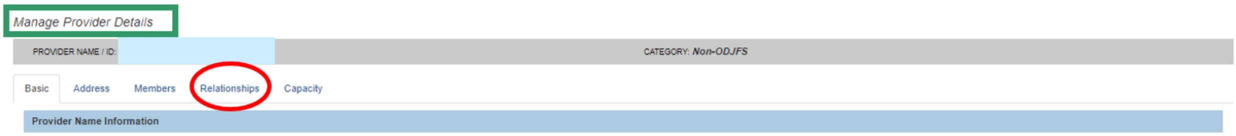
1. Navigate to the **Provider Overview** page.
2. Click **Provider Information**.



Managing Person-Level Relationships

The **Manage Provider Details** screen appears.

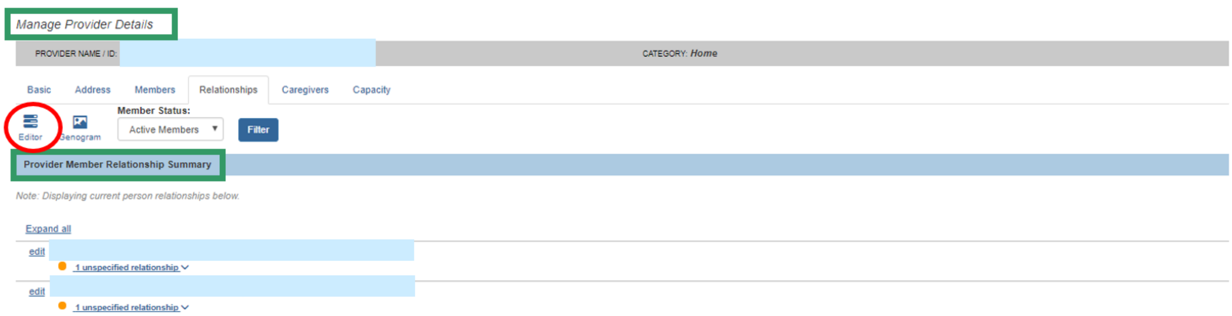
3. Click the **Relationships** tab.



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

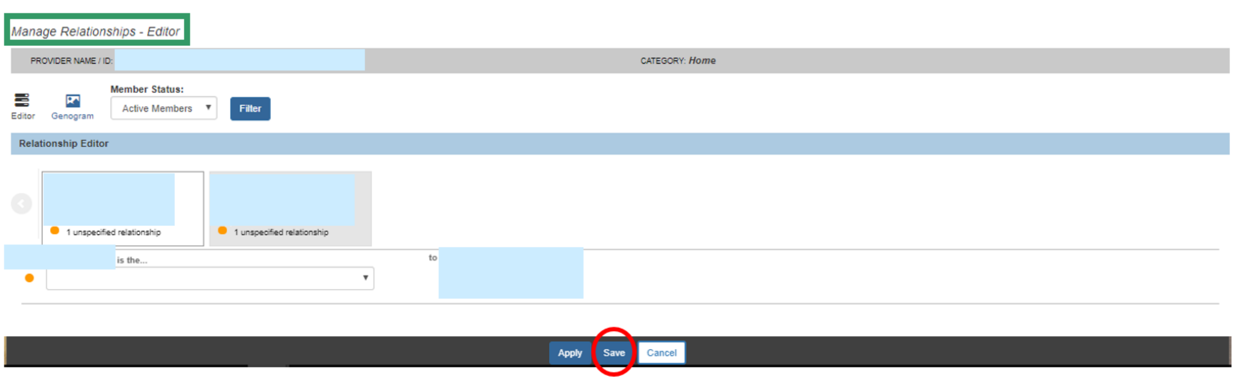
Note: The Member Status list set defaults to **Active Members**; however, user can select All Members from the drop-down menu, and then click **Filter** to change the list set.

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



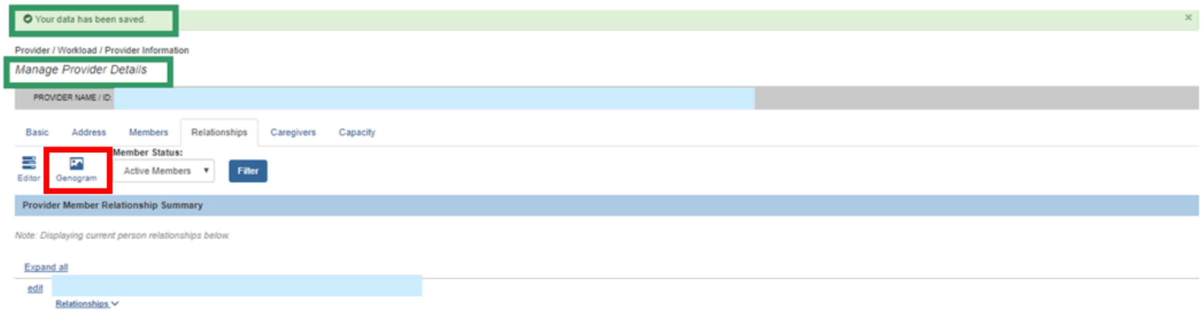
The **Manage Relationships - Editor** screen appears.

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



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

1. Click the **Genogram** icon.

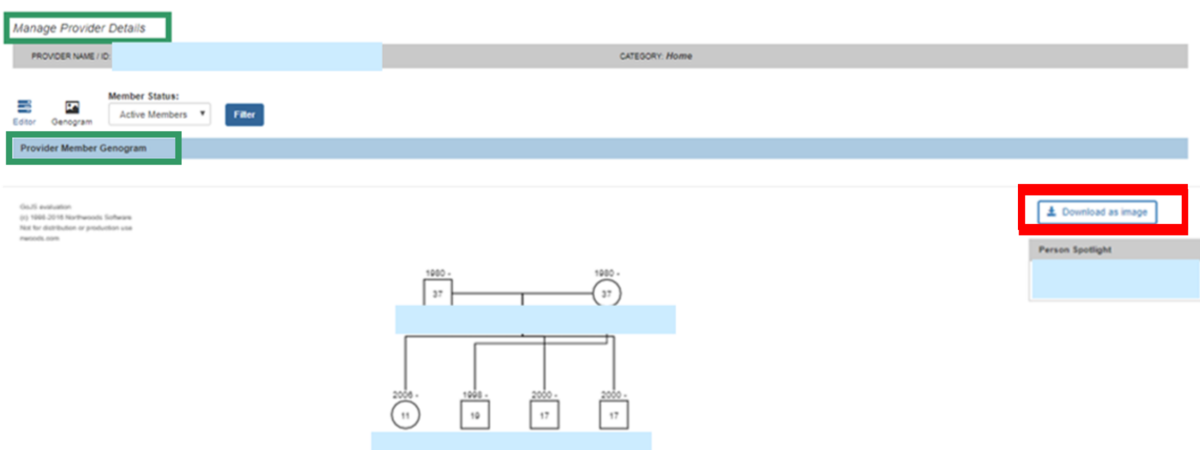


The **Manage Provider Details** screen appears, displaying the **Provider Member Genogram**.

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**.

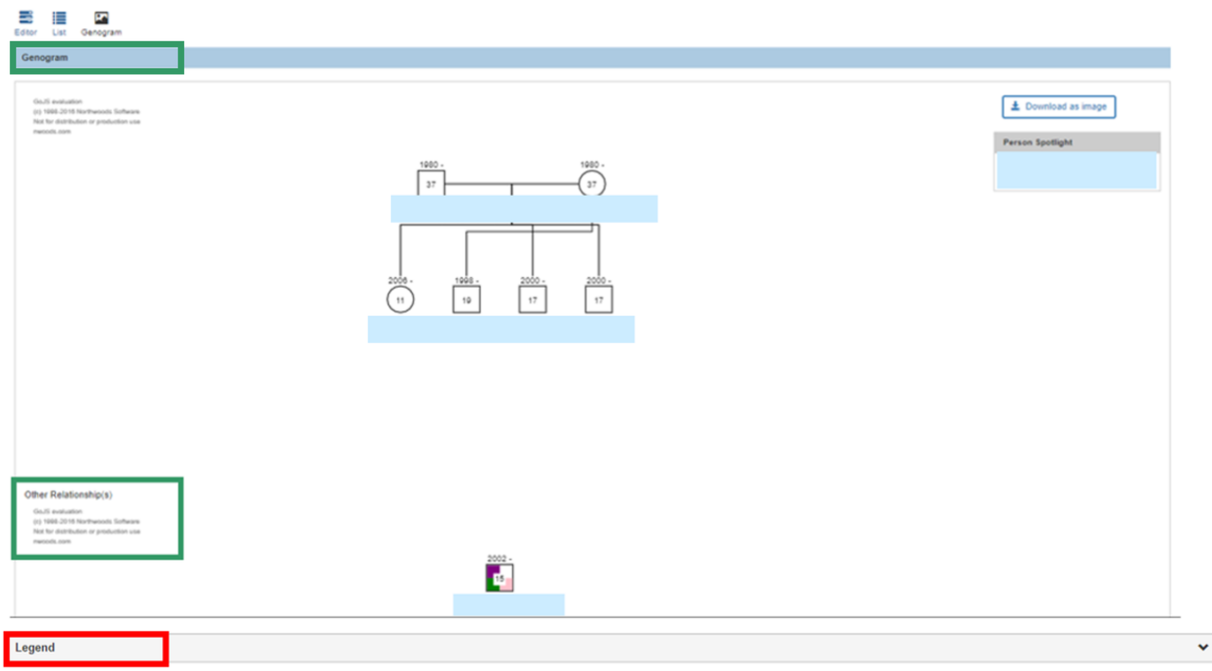


Note: The Genogram displays with the focus person highlighted. You can click on any person listed in the Genogram to change the focus. Information about the person in focus is displayed in the **Person Spotlight** grid. When you click an individual's name in the Genogram, the information in the Person 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

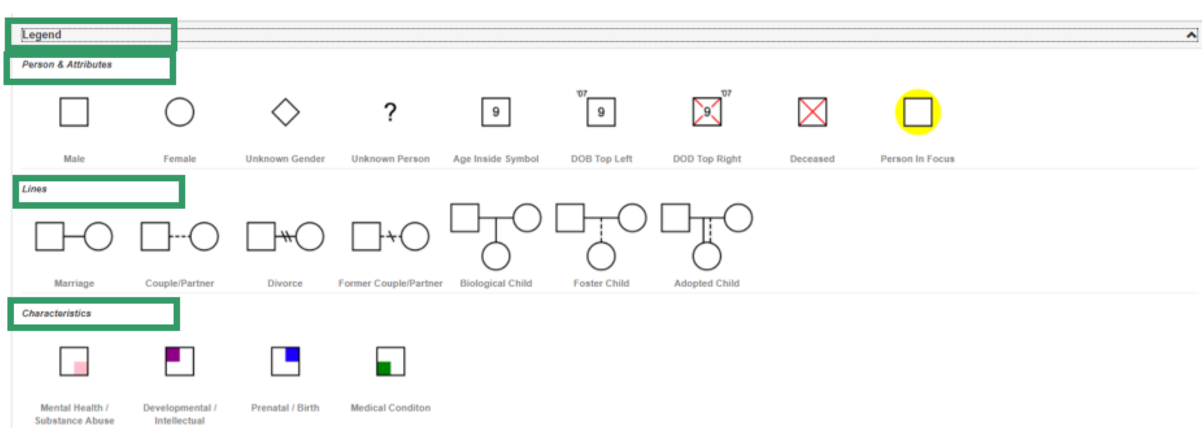
Important: Any person within the list set that has an unspecified relationship, or a relationship that cannot be drawn by the system and therefore cannot be included on the diagram, will be shown at the bottom of the diagram under "**Other Relationship(s)**."

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)
- Characterisitics (medical and mental health issues)



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