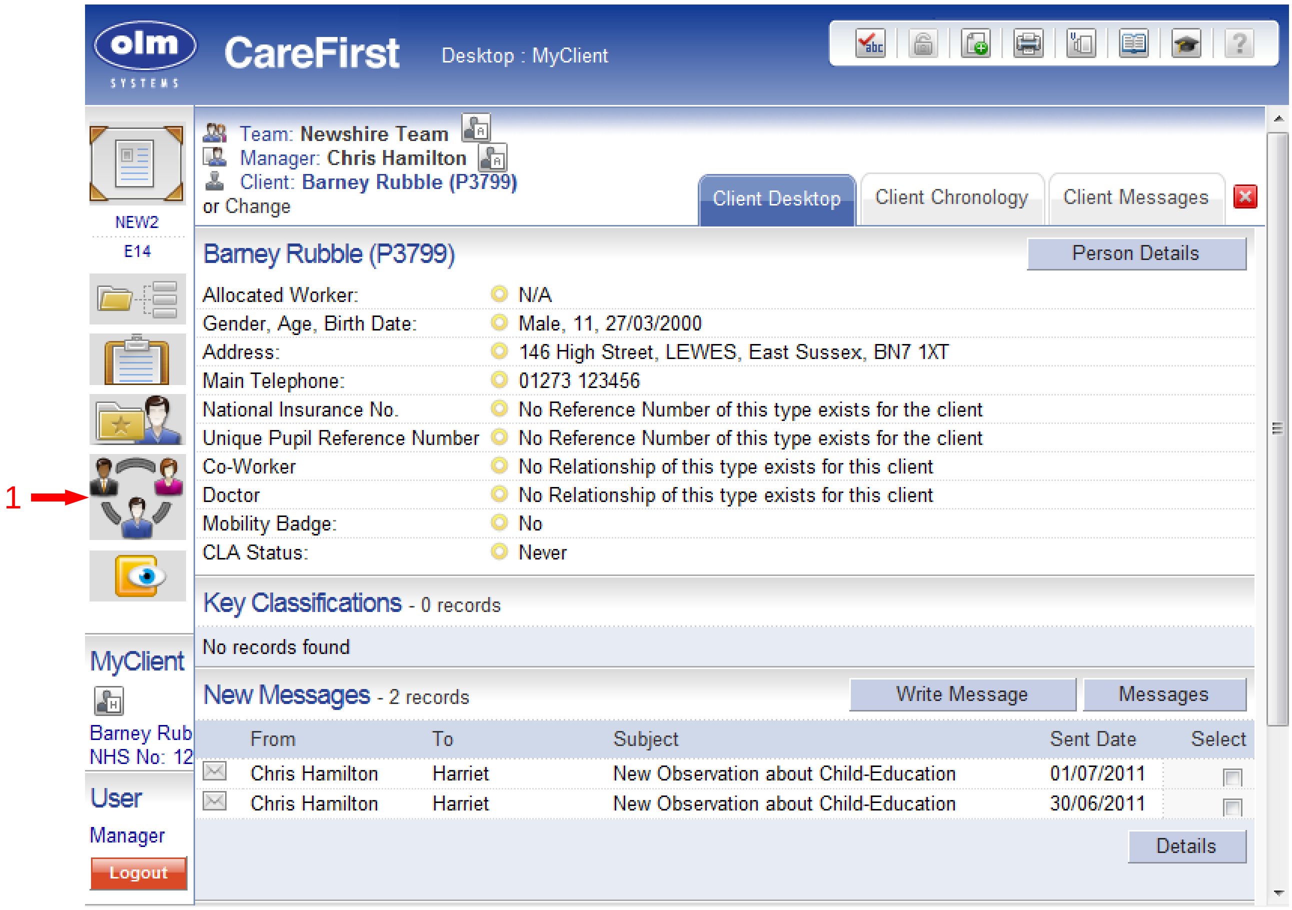
# How to add and end relationships

### Introduction

Relationships are used in CareFirst to record the relationship between a subject and their relatives, external professionals, and system users.

### Process




| Step | Instruction | Notes |
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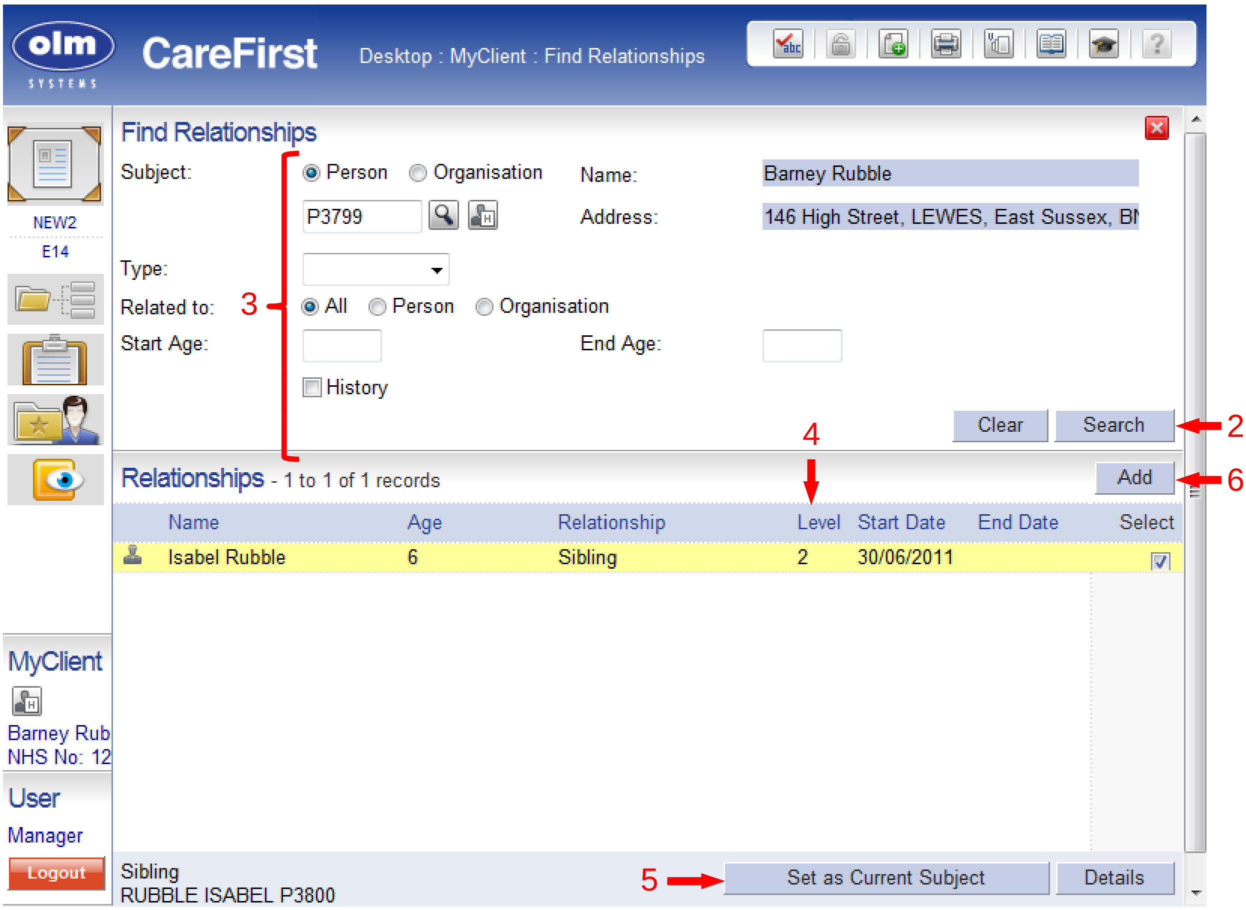
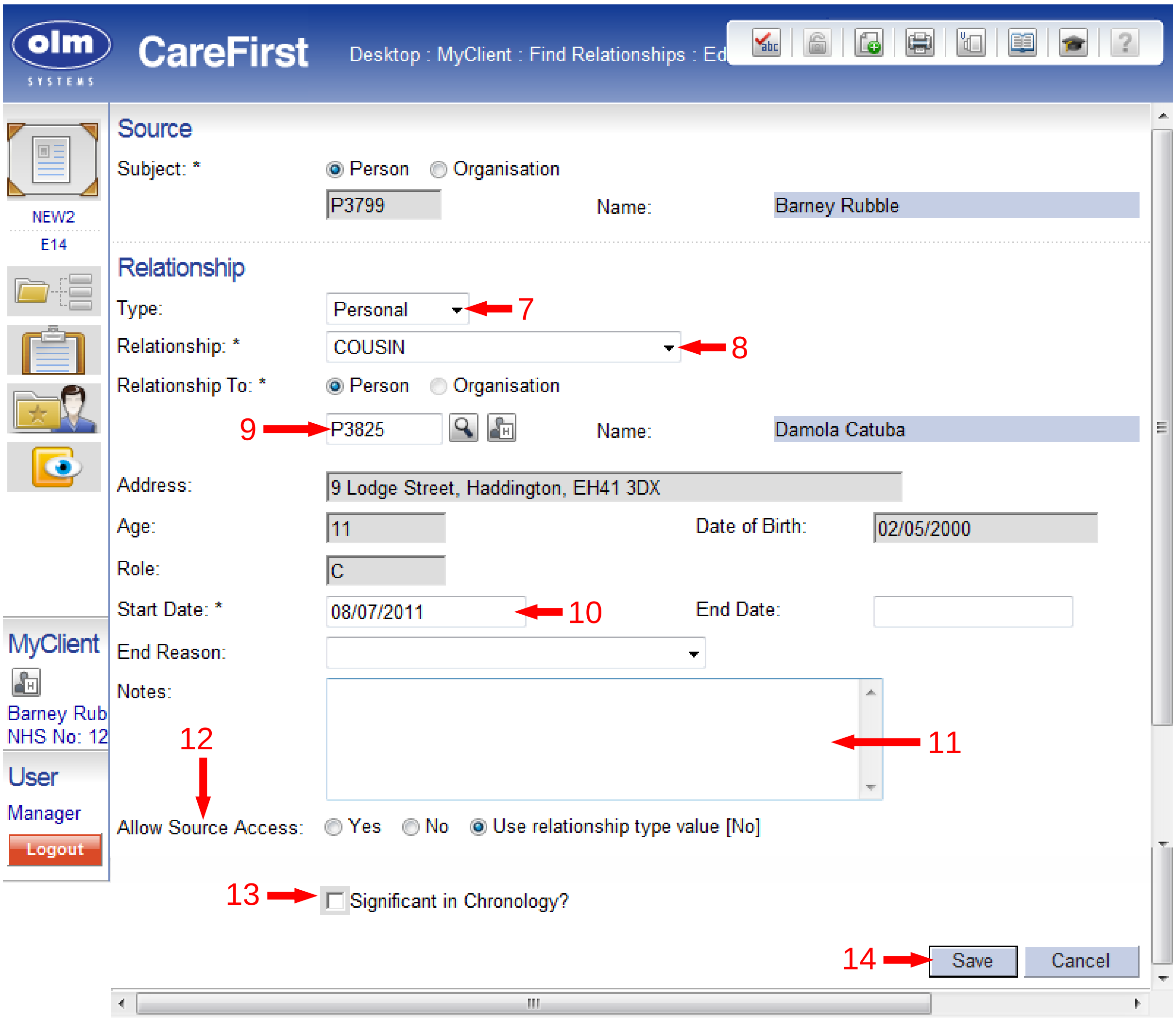
| 1. | Navigate to the Find Relationships screen using the left hand menu icon. | You can access the 'Find Relationships' screen either via the Main Menu or the MyClient Desktop. |

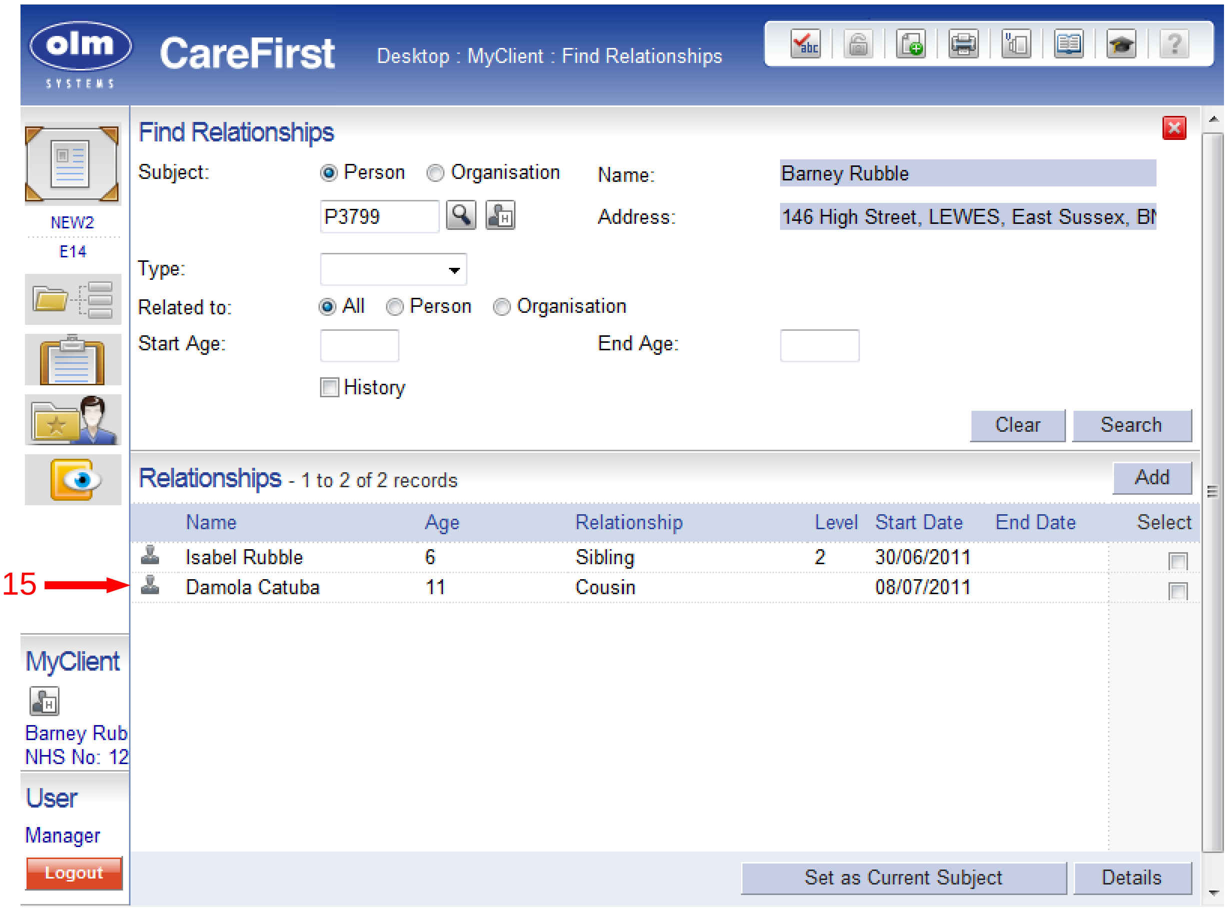



| Step | Instruction | Notes |
|---|---|---|
| 2. | The 'Find Relationships' screen is displayed.<br>To reveal all the relationships recorded on the subject's record, click Search. | All the current and historical relationships will be displayed. |
| 3. | | If you wanted to filter the results displayed, use the search fields in the top section and then click Search. |
| 4. | | The 'Level' is predetermined by your system administrator and is a way of sorting relationships in the list.<br>For example, the Role of Sibling has a Level of 2; as such it will appear below a relationship type that has been assigned a Level of 1, such as a Doctor. |
| 5. | | If you had selected a relationship and then clicked the 'Set as Current Subject' button, this will change the 'current subject' to the subject selected. |
| 6. | To add a new Relationship, click 'Add'. | |




| Step | Instruction | Notes |
|---|---|---|
| 7. | This will take you to the 'Relationship' screen.<br>Begin by recording the 'Type' of Relationship. | There are three types of Relationship.<br>• 'Allocation': for example, Social Worker<br>• 'Personal': for example, mother or partner<br>• And 'Professional': for example, GP or Psychiatrist |
| 8. | You must also select the 'Relationship'. | The options available in this list will depend on the 'Type' chosen above and on your local CareFirst configuration. |
| 9. | You must now record the person or organisation that has the relationship with the subject. | If the person's ID is not known, you can click the magnifying glass icon next to the field to take you to the find person screen, or alternatively, you can click the recent subjects icon which will take you to the recent subjects screen where you can choose a person from your recently viewed subjects.<br>Note: The Address, Age, Date of Birth and Role of the person will automatically be displayed if recorded.<br>These details cannot be amended from this screen. |

| Step | Instruction | Notes |
|---|---|---|
| 10. | You must record the date that the relationship began, in the 'Start Date' field. | If you are adding an 'Allocation', such as a Social Worker or Team, the Start Date should be the date that this allocation was made.<br>If you are adding a 'Personal' or 'Professional' relationship, the date can be the date of entry, i.e. today's date. |
| 11. | If you wish to record notes about this Relationship, use the 'Notes' field. | |
| 12. | | Use the 'Allow Source Access' field to override current access settings for external users, for example, a doctor may be allowed access to their patient's records.<br>If this is the case, a 'Yes' will be shown here.<br>This function may not be used in your local system. |
| 13. | | The 'Significant in chronology' field is 'display-only' and is set centrally by your CareFirst administrators.<br>If the box has a light grey border, as it does here, the relationship will be included in the client chronology as a significant record. |
| 14. | To save and exit the screen, click 'Save'. | |




| Step | Instruction | Notes |
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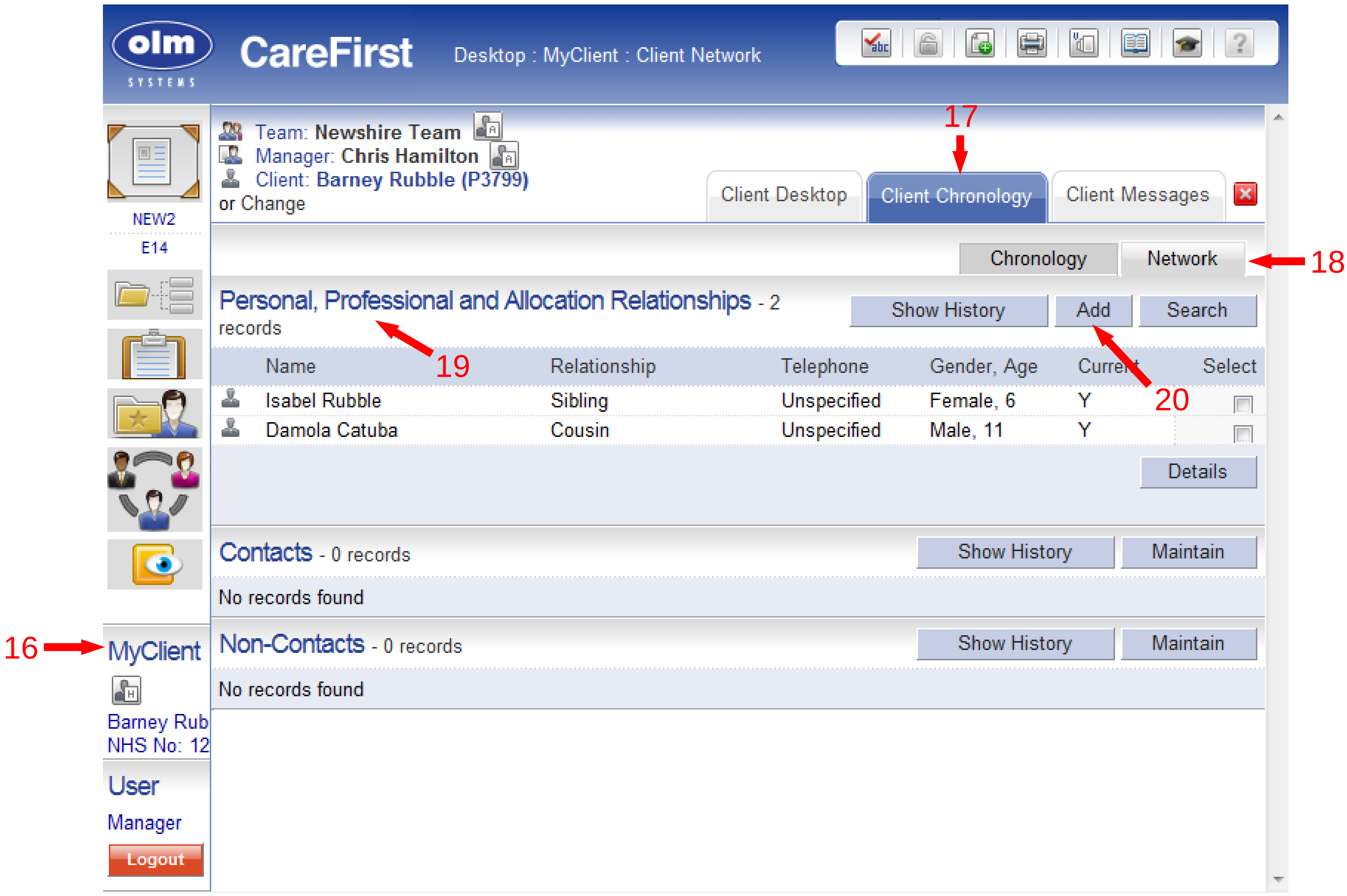
| 15. | The Relationship has been created. | |




| Step | Instruction | Notes |
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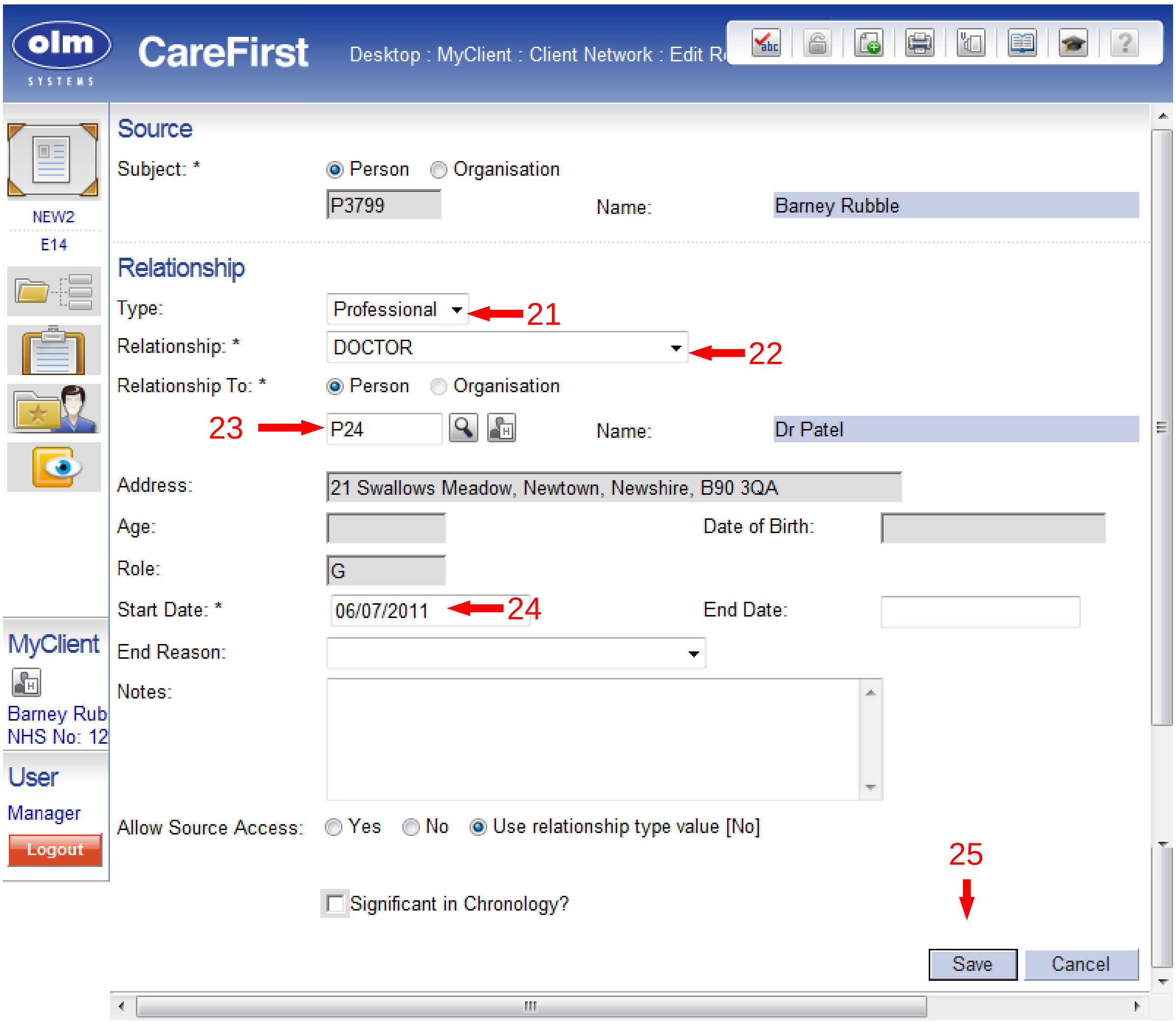
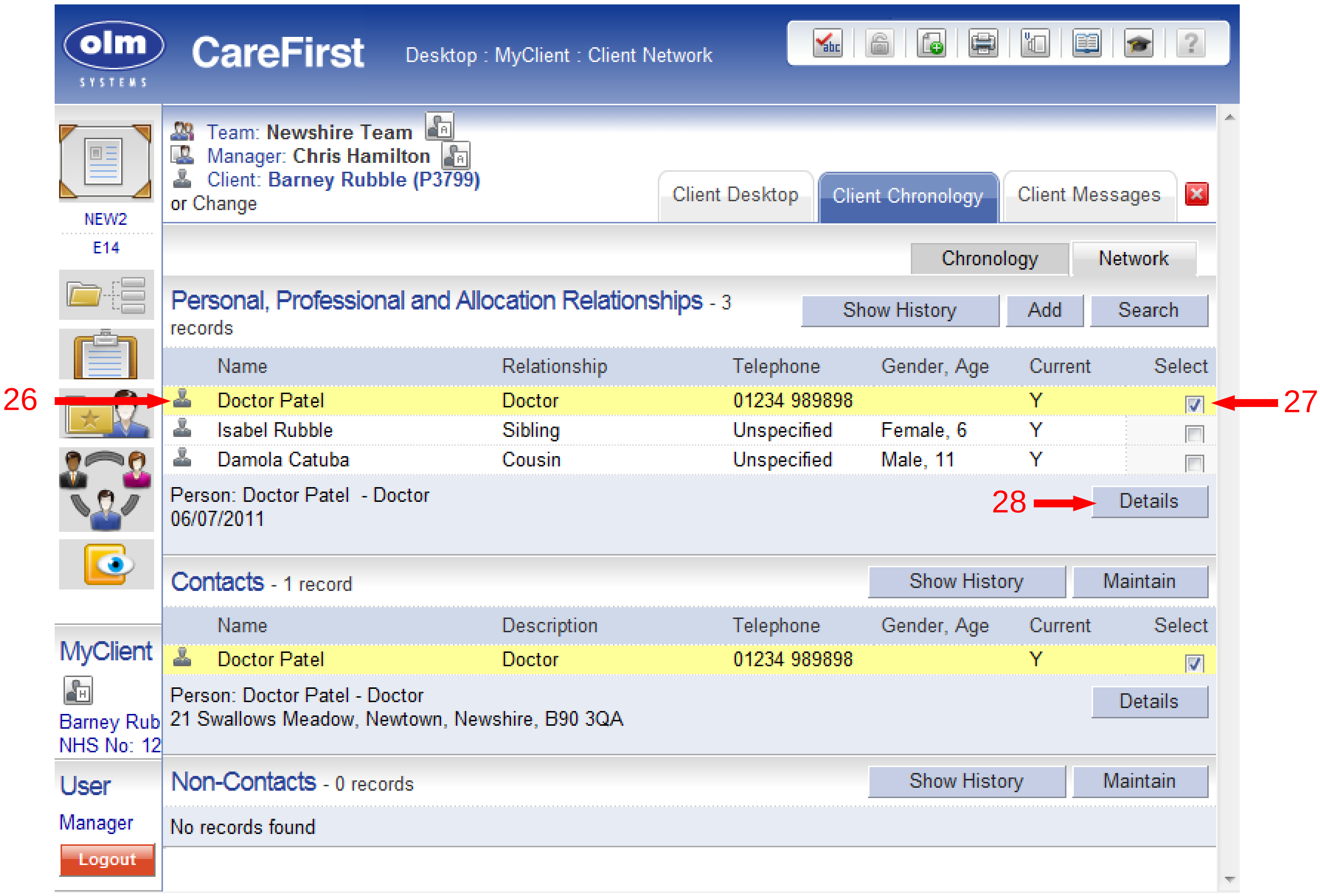
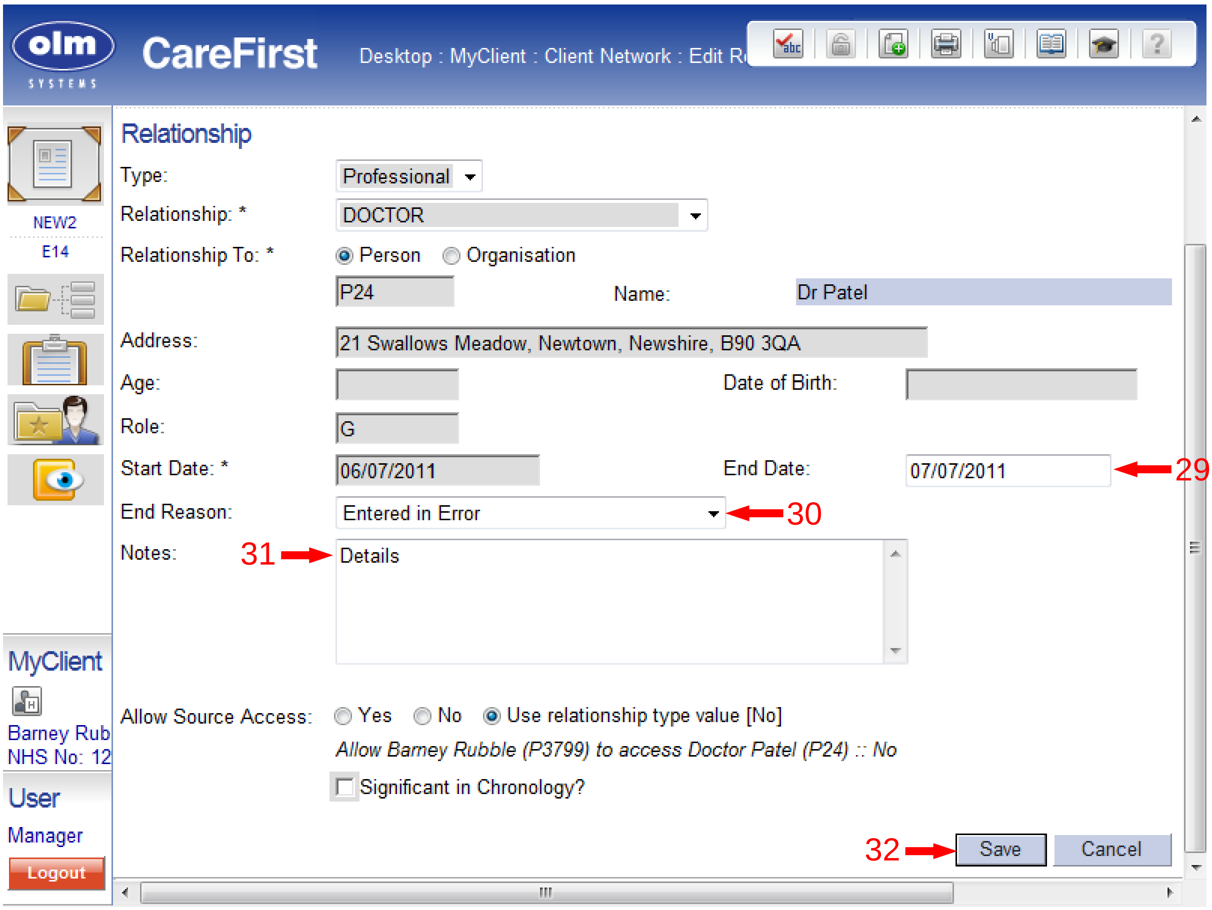
| 16. | Go to the MyClient Desktop via the link under MyClient. | |
| 17. | The MyClient screen is displayed.<br>Click on ‘Client Chronology’. | |
| 18. | Click the ‘Network’ tab. | |
| 19. | The Relationships and Contacts and Non Contacts for the subject are displayed. | From this screen you can search for relationships, view ended relationships and add relationships. |
| 20. | Add another relationship by clicking ‘Add’. | |




| Step | Instruction | Notes |
|---|---|---|
| 21. | Select a 'Type' of 'Professional'. | |
| 22. | Select a 'Relationship' of 'Doctor'. | |
| 23. | Enter the ID of the GP if known. | If the person's ID is not known, you can click the magnifying glass icon next to the field to take you to the find person screen, or alternatively, you can click the recent subjects icon which will take you to the recent subjects screen where you can choose a person from your recently viewed subjects. |
| 24. | Record the relevant 'Start Date'. | |
| 25. | Click 'Save'. | |




| Step | Instruction | Notes |
|---|---|---|
| 26. | The Doctor has been added. | Given that it has been assigned a Level of '1' by the CareFirst administrator; it is at the top of the list. |
| 27. | To end a relationship, ensure it is selected. | |
| 28. | Click 'Details'. | |




| Step | Instruction | Notes |
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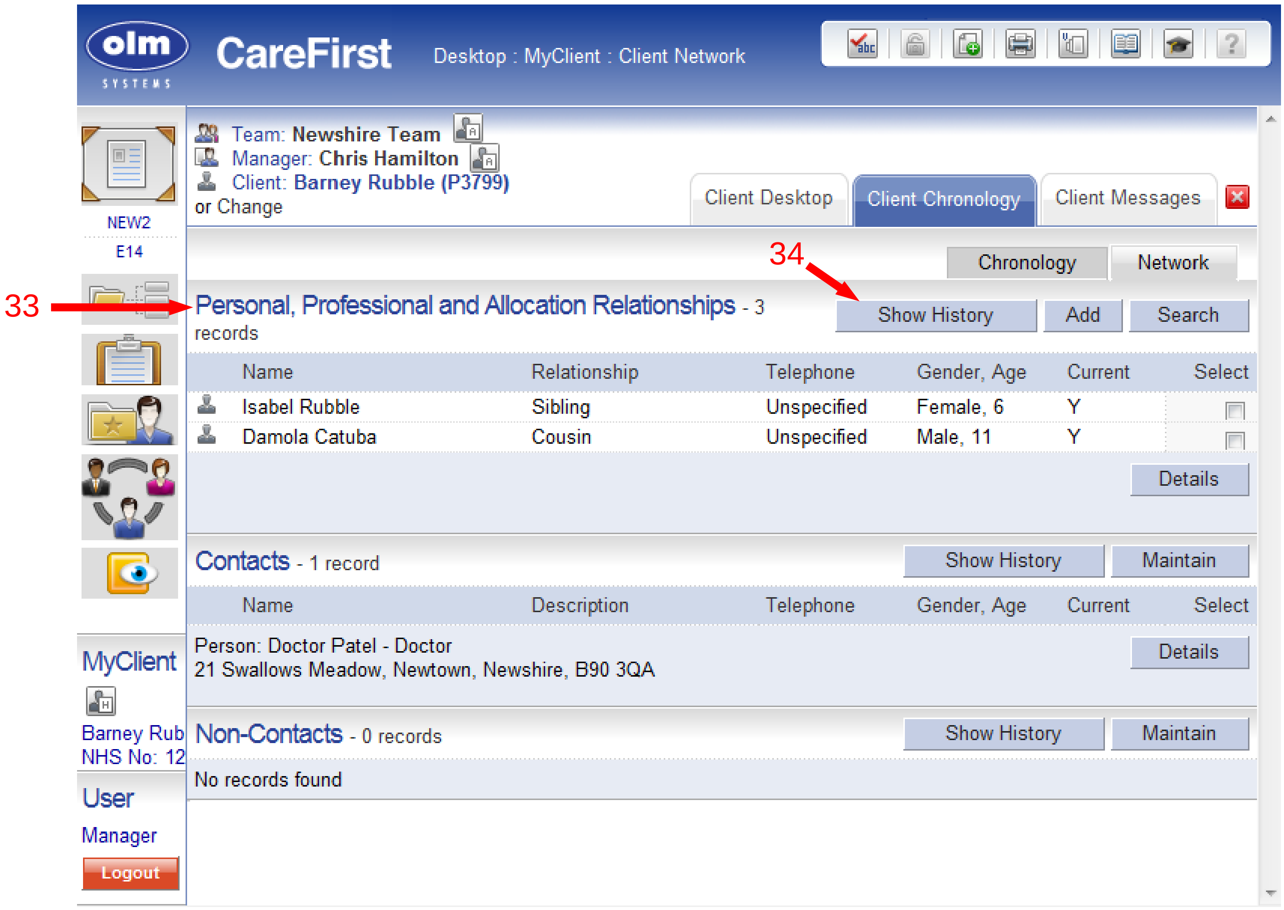
| 29. | Record the date the relationship ended. | |
| 30. | Then record the 'End Reason'. | |
| 31. | Where appropriate, record the 'Notes'. | |
| 32. | Click 'Details'. | |




| Step | Instruction | Notes |
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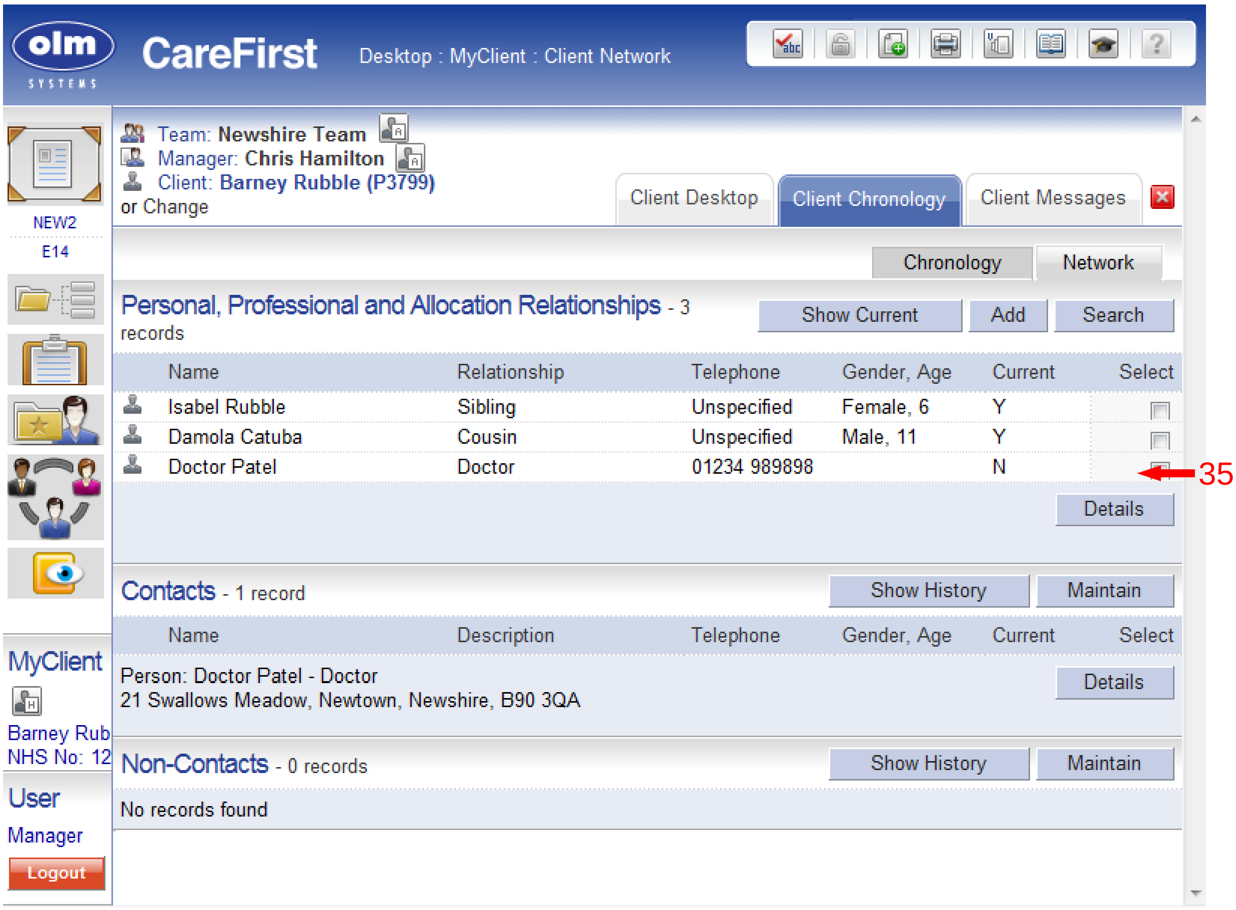
| 33. | The 'Relationship' has been removed from the list. | |
| 34. | To view ended relationships, click 'Show History'. | |




| Step | Instruction | Notes |
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| 35. | The ended relationship is displayed. | |