

How to add and end relationships

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Introduction

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

Process

The screenshot shows the CareFirst MyClient desktop interface. At the top, the OLM Systems logo and 'CareFirst' branding are visible, along with the user's desktop name 'MyClient'. The interface includes a navigation menu on the left with icons for various functions. A red arrow labeled '1' points to the 'Find Relationships' icon. The main content area displays client information for Barney Rubble (P3799), including team details (Newshire Team, Manager: Chris Hamilton), personal details (Gender: Male, Age: 11, Birth Date: 27/03/2000), address (146 High Street, LEWES, East Sussex, BN7 1XT), and contact information (Main Telephone: 01273 123456). It also lists various status fields like National Insurance No., Unique Pupil Reference Number, Co-Worker, Doctor, Mobility Badge, and CLA Status, all with 'No Reference Number' or 'No Relationship' status. Below this, there are sections for 'Key Classifications' (0 records), 'New Messages' (2 records), and a 'Logout' button.

Step	Instruction	Notes
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.

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The screenshot shows the 'Find Relationships' window in the CareFirst system. The subject is 'Barney Rubble' (Person, P3799). The search results show one relationship: Isabel Rubble (Age 6, Sibling, Level 2, Start Date 30/06/2011). The interface includes search filters, a table of relationships, and buttons for 'Add', 'Set as Current Subject', and 'Details'.

Step	Instruction	Notes
2.	The 'Find Relationships' screen is displayed. 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. 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'.	

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Step	Instruction	Notes
7.	This will take you to the 'Relationship' screen. Begin by recording the 'Type' of Relationship.	There are three types of Relationship. <ul style="list-style-type: none"> 'Allocation': for example, Social Worker 'Personal': for example, mother or partner 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. Note: The Address, Age, Date of Birth and Role of the person will automatically be displayed if recorded. These details cannot be amended from this screen.

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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. 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. If this is the case, a 'Yes' will be shown here. 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. 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'.	

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CareFirst
Desktop : MyClient : Find Relationships

Find Relationships

Subject: Person Organisation

Name:

Address:

P3799

Type:

Related to: All Person Organisation

Start Age: End Age:

History

Relationships - 1 to 2 of 2 records

	Name	Age	Relationship	Level	Start Date	End Date	Select
	Isabel Rubble	6	Sibling	2	30/06/2011		<input type="checkbox"/>
	Damola Catuba	11	Cousin		08/07/2011		<input type="checkbox"/>

MyClient

Barney Rub
NHS No: 12

User

Manager

15

Step	Instruction	Notes
15.	The Relationship has been created.	

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The screenshot shows the CareFirst MyClient interface. The top navigation bar includes the OLM logo, 'CareFirst' text, and 'Desktop : MyClient : Client Network'. The main content area is divided into several sections:

- Client Information:** Team: Newshire Team, Manager: Chris Hamilton, Client: Barney Rubble (P3799) or Change.
- Client Chronology:** A tab labeled 'Client Chronology' (arrow 17) is active. Below it, there are tabs for 'Chronology' and 'Network' (arrow 18).
- Personal, Professional and Allocation Relationships - 2 records:** A table with columns: Name (arrow 19), Relationship, Telephone, Gender, Age, Current, and Select. Two records are listed: Isabel Rubble (Sibling, Female, 6, Y) and Damola Catuba (Cousin, Male, 11, Y). An 'Add' button (arrow 20) is located above the table.
- Contacts - 0 records:** A section with 'Show History' and 'Maintain' buttons.
- Non-Contacts - 0 records:** A section with 'Show History' and 'Maintain' buttons.
- Left Sidebar:** Contains 'MyClient' (arrow 16), 'Barney Rub', 'NHS No: 12', 'User', 'Manager', and a 'Logout' button.

Step	Instruction	Notes
16.	Go to the MyClient Desktop via the link under MyClient.	
17.	The MyClient screen is displayed. 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'.	

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Source

Subject: * Person Organisation
 P3799 Name: Barney Rubble

Relationship

Type: Professional
 Relationship: * DOCTOR
 Relationship To: * Person Organisation
 P24 Name: Dr Patel
 Address: 21 Swallows Meadow, Newtown, Newshire, B90 3QA
 Age: Date of Birth:
 Role: G
 Start Date: * 06/07/2011 End Date:
 End Reason:
 Notes:
 Allow Source Access: Yes No Use relationship type value [No]
 Significant in Chronology?

Save Cancel

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'.	

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Team: Newshire Team
Manager: Chris Hamilton
Client: Barney Rubble (P3799)
 or Change

Client Desktop | **Client Chronology** | Client Messages

Chronology | Network

Personal, Professional and Allocation Relationships - 3 records

Name	Relationship	Telephone	Gender, Age	Current	Select
Doctor Patel	Doctor	01234 989898		Y	<input checked="" type="checkbox"/>
Isabel Rubble	Sibling	Unspecified	Female, 6	Y	<input type="checkbox"/>
Damola Catuba	Cousin	Unspecified	Male, 11	Y	<input type="checkbox"/>

Person: Doctor Patel - Doctor
06/07/2011

Contacts - 1 record

Name	Description	Telephone	Gender, Age	Current	Select
Doctor Patel	Doctor	01234 989898		Y	<input checked="" type="checkbox"/>

Person: Doctor Patel - Doctor
21 Swallows Meadow, Newtown, Newshire, B90 3QA

Non-Contacts - 0 records

No records found

Logout

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'.	

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Relationship

Type: Professional

Relationship: * DOCTOR

Relationship To: * Person Organisation

P24 Name: Dr Patel

Address: 21 Swallows Meadow, Newtown, Newshire, B90 3QA

Age: Date of Birth:

Role: G

Start Date: * 06/07/2011 End Date: 07/07/2011

End Reason: Entered in Error

Notes: 31 → Details

Allow Source Access: Yes No Use relationship type value [No]
 Allow Barney Rubble (P3799) to access Doctor Patel (P24) :: No

Significant in Chronology?

32 → Save Cancel

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

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The screenshot shows the CareFirst desktop interface. At the top, it displays 'olm CareFirst SYSTEMS' and 'Desktop : MyClient : Client Network'. The main area is divided into several sections:

- Client Information:** Team: Newshire Team, Manager: Chris Hamilton, Client: Barney Rubble (P3799) or Change.
- Navigation:** Client Desktop, Client Chronology (selected), Client Messages.
- Relationships Section:**
 - Section: **Personal, Professional and Allocation Relationships - 3 records**
 - Buttons: Show History (highlighted with red arrow 34), Add, Search.
 - Table:

Name	Relationship	Telephone	Gender, Age	Current	Select
Isabel Rubble	Sibling	Unspecified	Female, 6	Y	<input type="checkbox"/>
Damola Catuba	Cousin	Unspecified	Male, 11	Y	<input type="checkbox"/>
 - Buttons: Details
- Contacts Section:**
 - Section: **Contacts - 1 record**
 - Buttons: Show History, Maintain.
 - Table:

Name	Description	Telephone	Gender, Age	Current	Select
Person: Doctor Patel - Doctor 21 Swallows Meadow, Newtown, Newshire, B90 3QA					
 - Buttons: Details
- Non-Contacts Section:**
 - Section: **Non-Contacts - 0 records**
 - Buttons: Show History, Maintain.
 - Text: No records found

On the left sidebar, there is a 'MyClient' section with 'Barney Rub' and 'NHS No: 12', and a 'User' section with 'Manager' and a 'Logout' button. A red arrow labeled 33 points to the 'Personal, Professional and Allocation Relationships' section header.

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

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The screenshot shows the CareFirst MyClient interface. The top navigation bar includes the OLM Systems logo, 'CareFirst' branding, and the user's session information: 'Desktop : MyClient : Client Network'. Below this, the user's team and manager are listed: 'Team: Newshire Team', 'Manager: Chris Hamilton', and 'Client: Barney Rubble (P3799)'. The main content area is divided into several sections: 'Client Desktop', 'Client Chronology', and 'Client Messages'. The 'Client Chronology' section is active, showing 'Personal, Professional and Allocation Relationships - 3 records'. A table lists three relationships: Isabel Rubble (Sibling), Damola Catuba (Cousin), and Doctor Patel (Doctor). A red arrow points to the 'Details' button for the 'Doctor Patel' record. Below this, the 'Contacts' section shows one record for 'Doctor Patel - Doctor' with the address '21 Swallows Meadow, Newtown, Newshire, B90 3QA'. The 'Non-Contacts' section shows 'No records found'. The left sidebar contains navigation options like 'NEW2 E14', 'MyClient', and 'User Manager' with a 'Logout' button.

Step	Instruction	Notes
35.	The ended relationship is displayed.	