Relations

Purpose	Link two client records so staff can view a documented family or other relationship from either client.
Who should do this	CAREWare users who are authorized to update client records and manage relationships.
Use Relations when you need to	Add, review, or remove a link between two existing client records.
Main warning	Verify both clients before appending or detaching a relationship. The action updates the relationship shown in both records.
What the list shows	Relationship type, client name, index-client status, birth date, and other available client details.

Quick path
Open client record › Relations › Append Relationship › search for and select the related client › Append Selected › choose Is The relationship › Save.

Before you begin

Both clients must have records in CAREWare. Confirm that you have the correct client records before creating a link, especially when clients have similar names. You may want to search for both clients first using the Find Client feature. If one of the clients is not in CAREWare, use Add Client to create the record.

Important
The client record you start from is the index client. The client you search for and append is the dependent (secondary) client. CAREWare creates the corresponding relationship entry in both records.

Relationship types

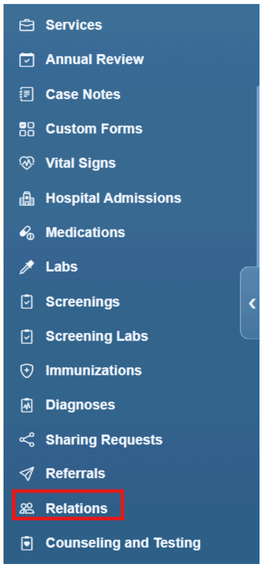
The Relations tab can track the following links:

- Aunt/uncle
- Brother/sister
- Child
- Cousin
- Grandchild
- Grandparent
- Niece/nephew
- Not Family
- Other
- Parent

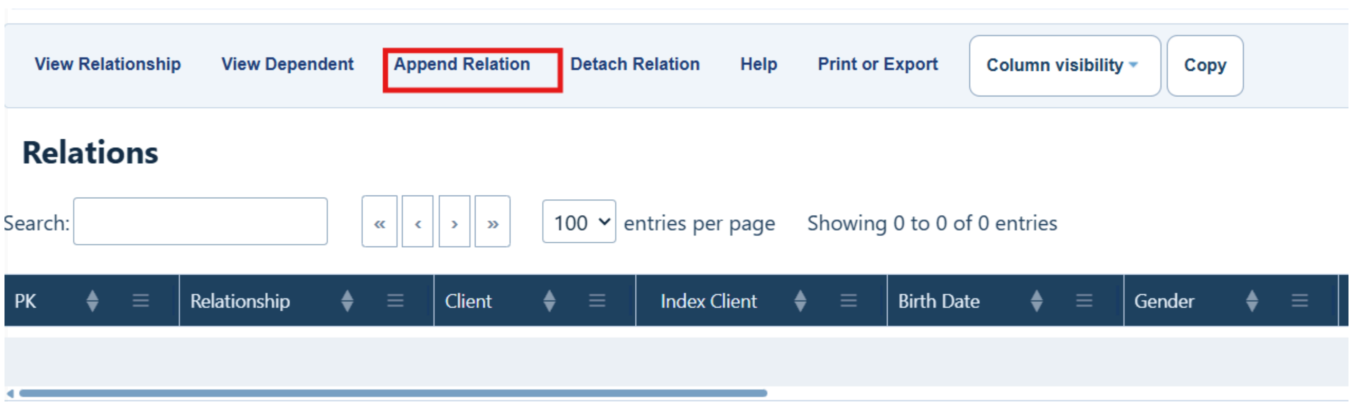
Add a relationship between client records

Step 1. **Open the record of the index client.**

Step 2. **Click Relations.**



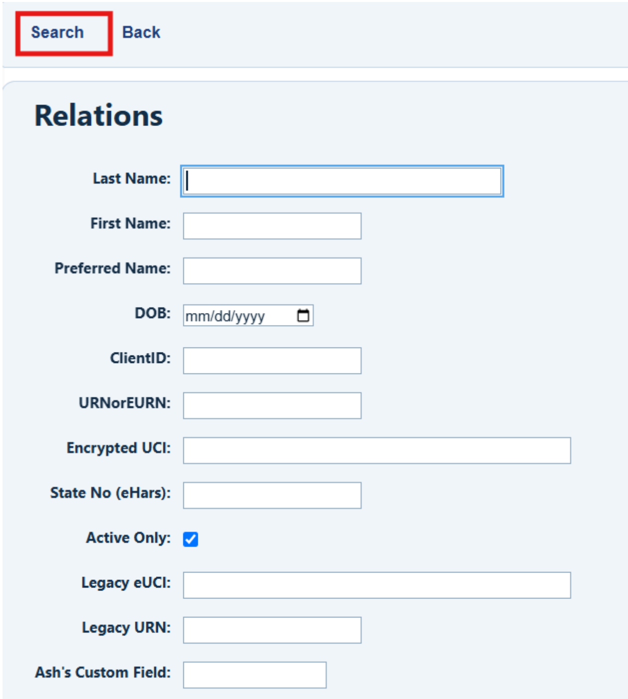
Step 3. **Click Append Relationship to add a new relationship record.**



What each button does on the Relations page

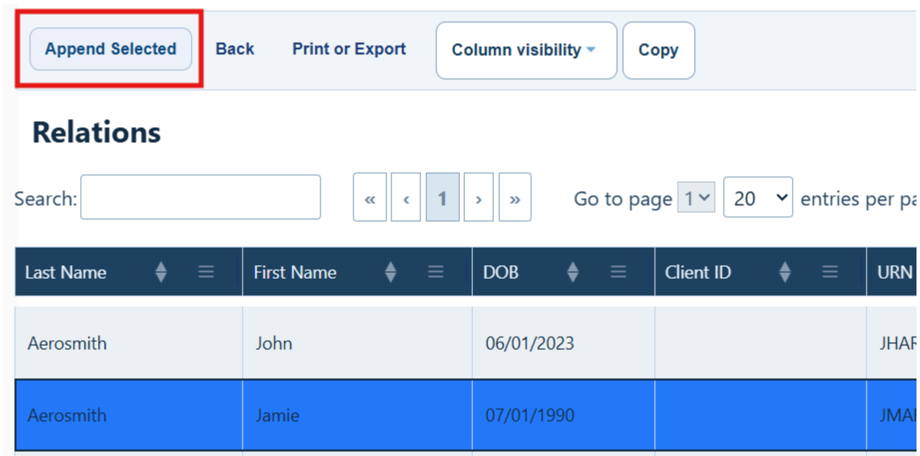
Button	What it does
View Relationship	View the selected relationship record.
View Dependent	Open the related client's record.
Append Relationship	Add a relationship record.
Detach Relation	Remove a relationship and its link between the two clients.
Help	Open the Knowledge Base article for Relations.
Print or Export	Print or export the relationship list.
Column Visibility	Choose which columns appear in the list.

Step 4. **Search for the dependent (secondary) client.**



Tip
Use enough identifying information to distinguish clients with similar names. Compare date of birth or other available details before selecting a record.

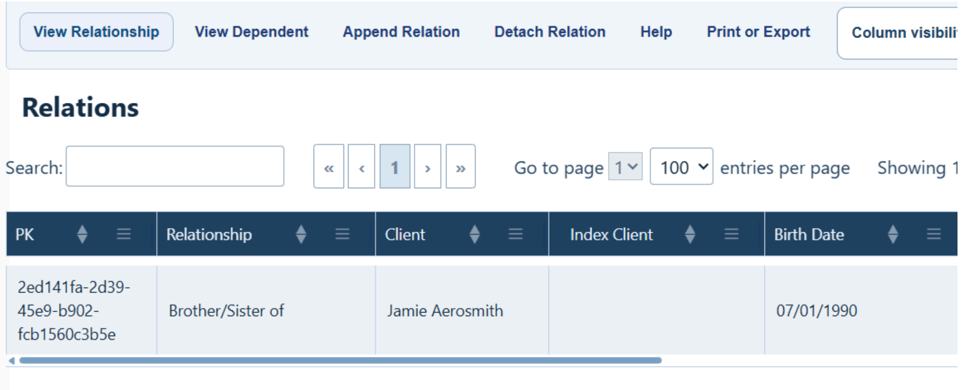
Step 5. **Highlight the secondary client's name in the list and click Append Selected.**



Step 6. **Choose the type of relationship in the Is The field, then click Save.**

Review the saved relationship

The Relations list shows the relationship type, the appended client's name, date of birth, and other available information.



CAREWare automatically adds the corresponding relationship record to the dependent client.

How to confirm it worked

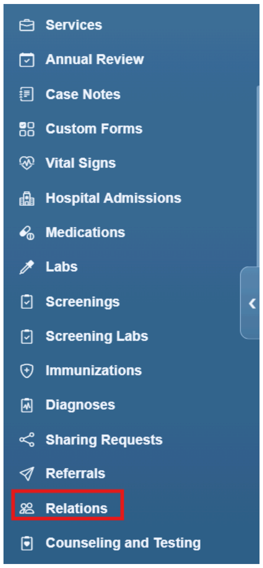
- Confirm the expected relationship appears in the index client's Relations list.
- Select the relationship and use View Dependent to open the related client.
- Open Relations in the dependent client's record.
- Confirm the corresponding relationship points back to the index client.

Important
If the wrong client or relationship type was selected, detach the incorrect client and create the correct relationship. Do not leave a known incorrect relationship in either client record.

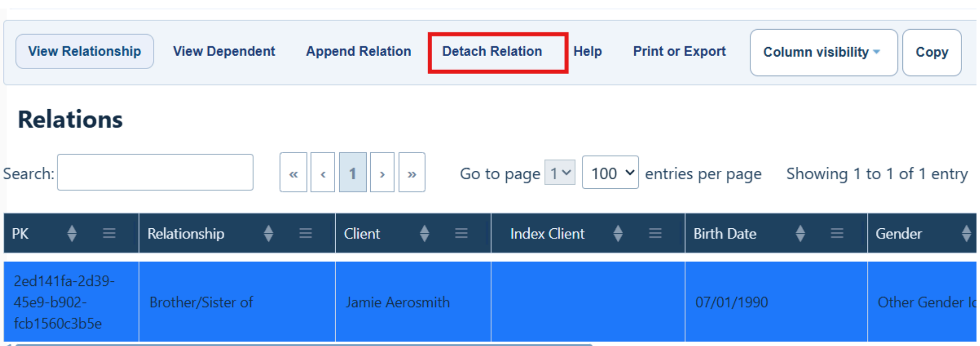
Remove a relational link between two client records

Detaching a relationship removes the link from both the index and dependent client records.

Step 1. Click Relations in the index or dependent client record.

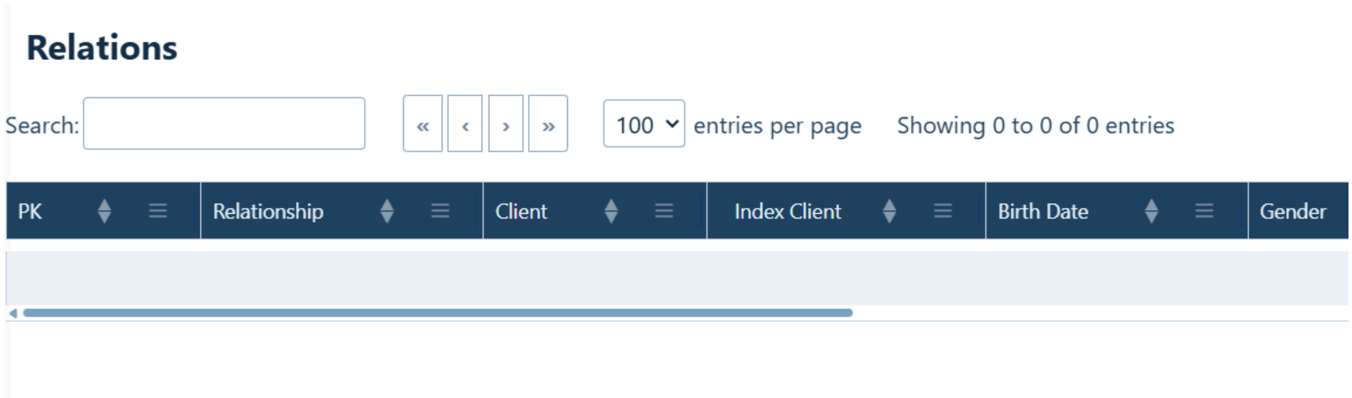


Step 2. Highlight the existing relationship record and click Detach Relation.



How to confirm it worked

- Refresh or reopen the Relations list for the first client.
- Confirm the detached relationship no longer appears in the list of relations.
- Open the other client record and confirm the corresponding entry no longer appears in the list of relations.



Important
Detach Relation removes the relational link; it does not delete either client record. Confirm the selected row before detaching.

Troubleshooting and common questions

Why can't I find the dependent client?

Check the spelling and search criteria. Use fewer criteria if the search is too narrow, then verify the correct person with date of birth or other identifying information.

Why is Append Selected unavailable?

Highlight one client in the search-results list. If the button remains unavailable, confirm you have the necessary permissions to add and edit relations in client records.

Can I correct a relationship after saving it?

If the client or relationship type is wrong, detach the incorrect relationship and append the correct one. Confirm both records afterward.

Related References

Document	Use it for
Find Client	Search for a client in CAREWare.
Add Client	Add a client record to CAREWare.