Recording Client Relations

What do we mean by a Relation?

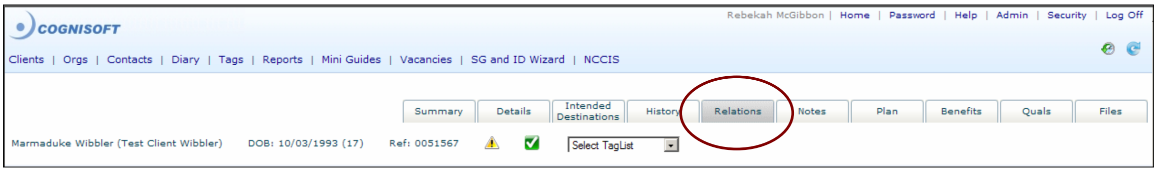
A Relation does not necessarily have to be an immediate family member. The concept of a Relation within Insight is anyone who has a link or relationship to the client. This could be parents, carers, siblings, partners and friends, GP's, Probation Officers or Social Workers.

Why would we keep details about Relations?

It can be useful to keep contact details for Relations for a number of reasons. One of the reasons might simply be as an emergency contact number – someone you could call if you were working with the client and they were taken unwell, for example. One of the reasons may be that the client is more easily contactable via a friend or a partner, so it might be useful to have the friend / partner contact details for getting in touch with your client. Keeping the contact details of other professionals that are working with the client can be useful for getting information updates from them. Information about client Relations can be very useful in tracking 'Not Known' clients as it gives you other avenues of enquiry over and above the client contact details you have.

Where does this information get recorded?

This information goes on the Relations page on the client record which is accessed by clicking on the Relations tab heading, as circled below.



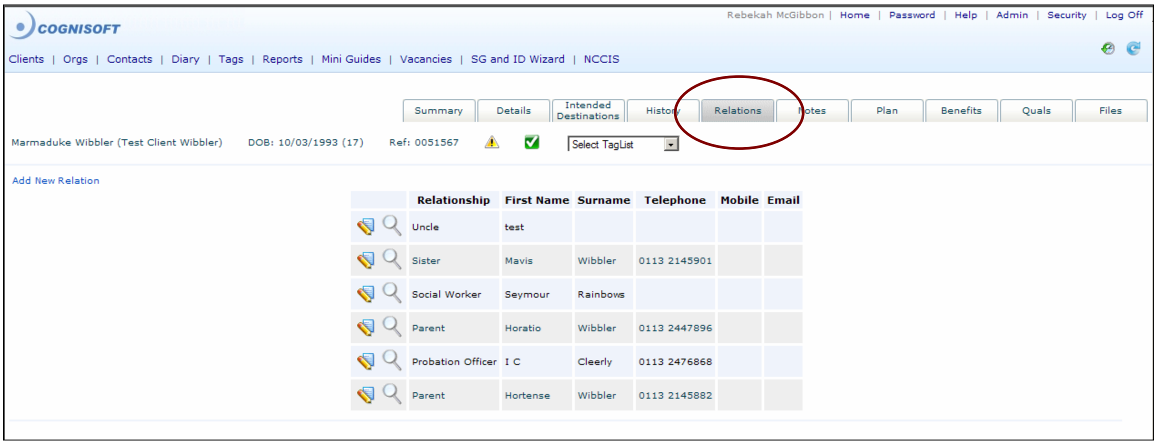
It has its own separate tab because we want to be able to distinguish the contact details that belong to the client, which should go on the client Details page, from those of other family members or Relations which should go on the Relations page.

Keeping the client details **ONLY** on the client Details page is really important, particularly for information sharing purposes, as details such as telephone number and address can often be used for client record matching. If we have any information other than the clients own on the client Details page, this can cause problems as we may create a duplicate for a client based on incorrect address or contact details.

Viewing client Relations

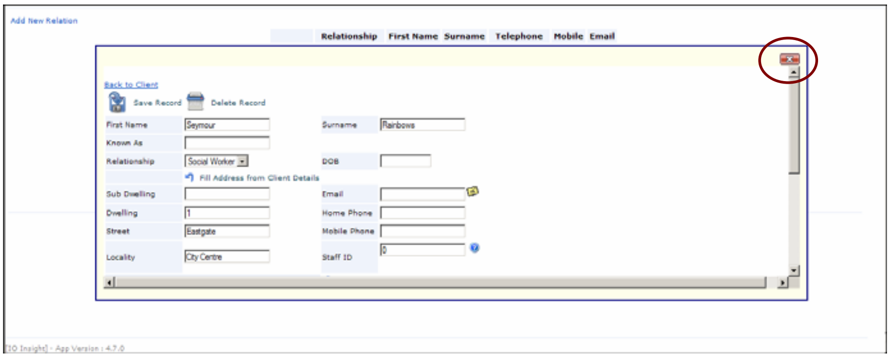
Clicking on the Relations tab heading in the clients record will open up the Relations page.

If there are any Relations already recorded, a summary of their information will appear as shown below. You can see that the nature of the relationship to the client is displayed, along with details of the name and phone number.



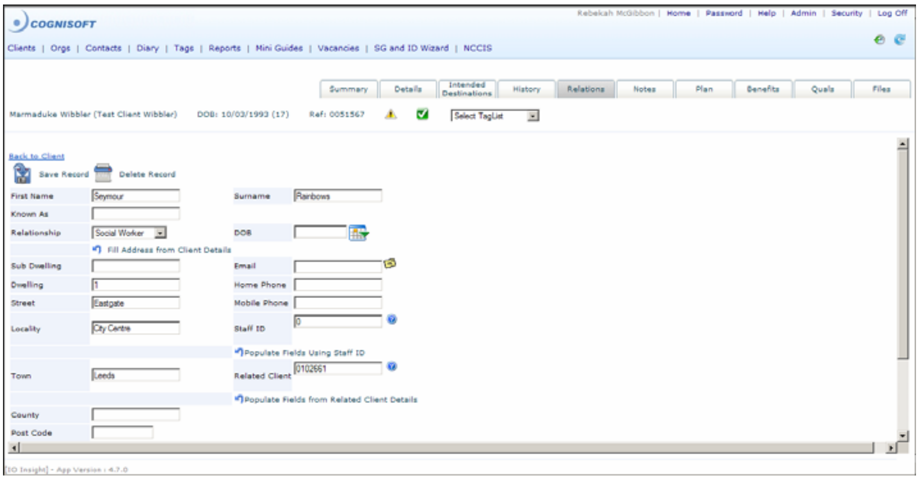
If you want to view any further details of any of the Relations already on the system, click on the View icon. 

This will open up a pop up screen, like the one shown right, where you can see more information such as address details. To close the pop up screen, click on the red X circled.

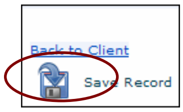


Editing client Relations

If you want to update an existing Relation with new information, you can do this using the Edit icon.  Click on the Edit icon and this will open up the Relation record.



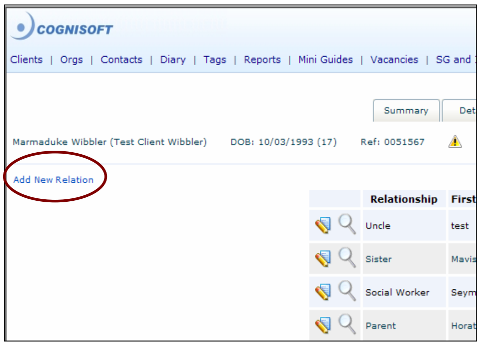
You can now make any amendments that you need to the record. When you are finished making your amendments, click on the Save icon.



If your information has saved successfully, you will see a message which says Record Saved. To go back to the table summary of all the Relations, click on the Back to Client link above the Save icon.

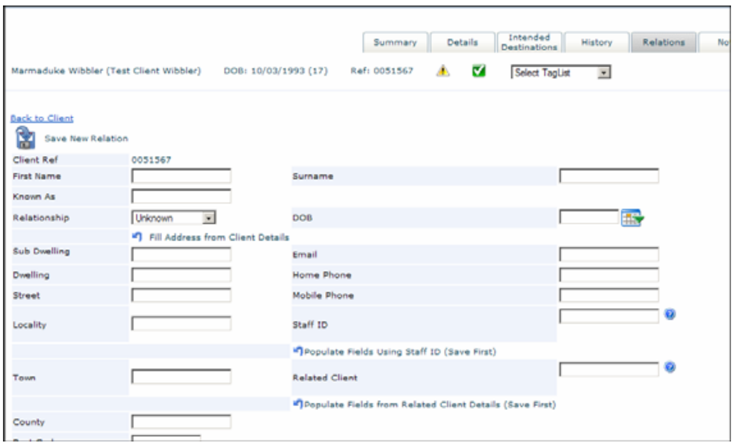
Recording a new Relation

To record a brand new Relation, click on the Add New Relation link on the right hand side of the page.

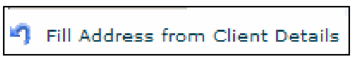


This will open up a new page as below.

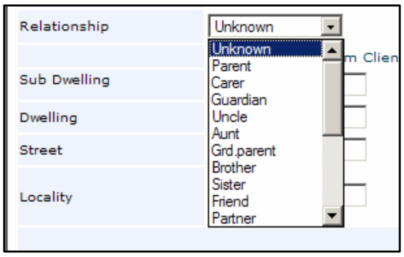
You can then fill in as much detail as you have available for the Relation.



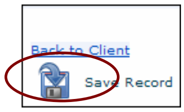
If the Relation you are recording is resident at the same address as your client, for example in the case of a sibling or parent, you can use the Fill Address from Client Details link to automatically fill in the address details.



The most important field to remember to fill in is the Relationship field. Make sure to select one of the values from the drop down list. Without this information, other users won't know who this person is or what their link is to the client.



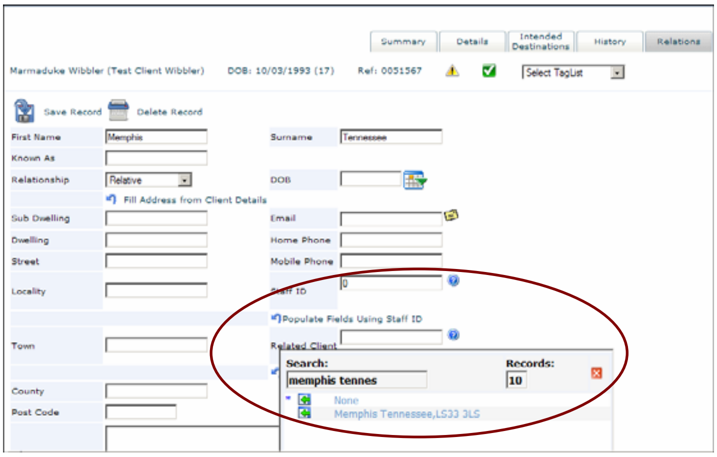
When you have entered as much information as you have, click on the Save icon.



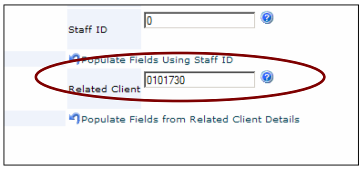
Linking related clients and related staff

It is possible that the Relation that you are recording is a sibling already on the system or is a staff member with an Insight record. If this is the case, you can link your client with these client records on Insight and you can use the contact information on their record to populate the fields on your new Relation.

You would do this by creating a new client as before and saving the record. Then, depending on whether it is a staff member or a client you are linking to, use the blue search bubble to locate the name of the client / staff member that you want to link the record to.

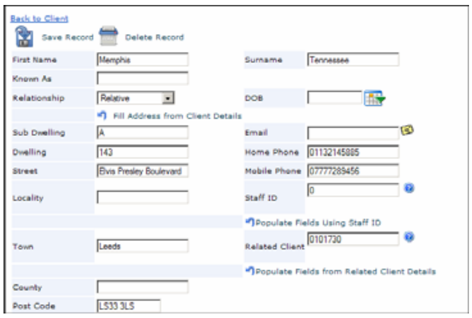


Once you have found the name that you are looking for, click on the green arrow next to their name. This will fill in the field with their reference number.



Once you have done this, click the link underneath named Populate Fields from Related Client Details.

Once you have clicked this, you will be able to see that the address and contact details have been imported from the linked client record on to this Relations record.



Now click Save.