

User Guide

GENERAL

Maintain Client Relationships

- Maintain Client Relationship
- View/Update Relationship
- Remove Relationship

Maintain Household Information

- Create Households
- Delete Households
- Update Household Members
- Join Household to Another Household

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A. Introduction

This guide describes the steps to create a relationship (link) between a parent and child client record and how to associate clients who reside at the same address by adding a client to a household.

Note that Saskatchewan is not currently implementing household functionality – it will be included in a future release.

Related User Guides:

Search Client

Maintain Client (Create, View, and Update Client Demographics)

Assumptions: The user has successfully logged into Panorama.

The user has been assigned the appropriate security permissions to perform the tasks assigned to them.

Pre-requisites: User is in the Immunizations module (tab).

A client record is in context.

Menu Access: Maintain Client Relationships screen

View Households screen



Maintain Client Relationships

TIP: A client must first have a relationship with another client before creating a household for that client.

Maintain Client Relationships

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ACTIVE

Client ID: 432	Name(First,Middle,Last)/Gender: Garry JS-Gorilla / Male	Health Card No: -	Date of Birth / Age: 2014 Jan 14 / 7 mos 5 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Gorilla, Garry ↑ Hide Relationship Detail

This Client has 0 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:

Name	Relationship to In-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
No relationships recorded.							

View Households

View Households

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ACTIVE

Client ID: 432	Name(First,Middle,Last)/Gender: Garry JS-Gorilla / Male	Health Card No: -	Date of Birth / Age: 2014 Jan 14 / 7 mos 5 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Current Households

Join another Household, or Create a new Household from client address or relationship address.

Row Actions:

Address	Household Effective From
No households recorded.	

Household Effective From: / / Household Effective To: / /

B. Steps to Maintain Client Relationships

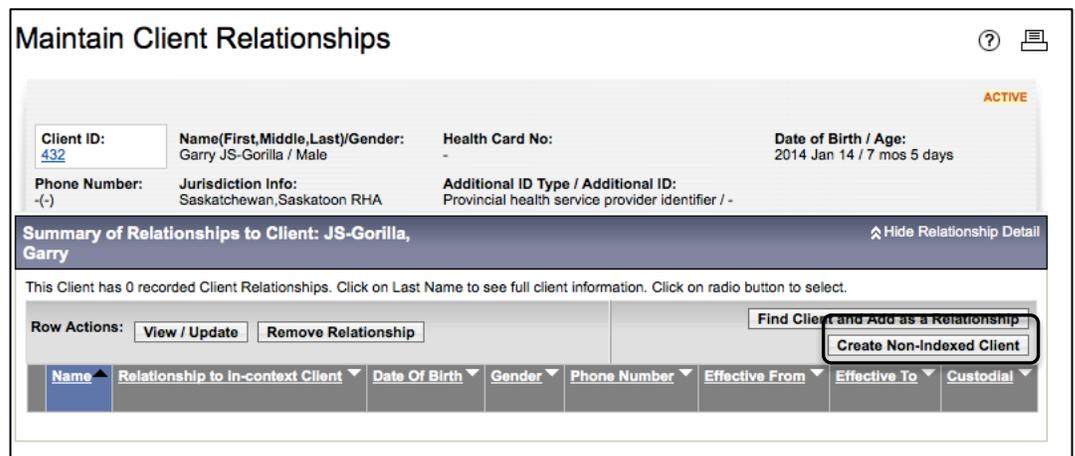
1.0 Maintain Client Relationship

Pre-requisites: User is in the Immunization module (tab).

Client record has been created and client is in context.

1.1 From the left-hand navigation under the Client Section, select Relationships.

Maintain Client Relationships screen displays, as shown below.



Maintain Client Relationships ? [Print]

ACTIVE

Client ID: 432	Name(First, Middle, Last)/Gender: Garry JS-Gorilla / Male	Health Card No: -	Date of Birth / Age: 2014 Jan 14 / 7 mos 5 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan, Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Gorilla, Garry ↑ Hide Relationship Detail

This Client has 0 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:

Name	Relationship to In-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial

TIP: A quick way to enter basic parent information on a child's record (parent's name / telephone number / address) is to use the **Client Quick Entry** screen. This is only available at the time of creating the child's record. To access this Client Quick Entry screen, a client search must first be performed (similar to **Create Client** screen). For more information, see the **Maintain Client User Guide**.

NOTE: Non-indexed clients can be linked to Panorama indexed clients via the Relationships link. However, a user is not able to search for or chart on a non-indexed client record.

There are two methods of adding relationship information to a client record:

- **Create a Non-Indexed Client** – The parent/guardian demographic information is recorded within the child's record, and not within her own clinical record. This may be appropriate if the parent/guardian will not be receiving service and will not have a clinical record.
- **Find Client and Add as a Relationship** – The parent/guardian has a record in the system and is linked to the child's record. This is appropriate if the parent/guardian is receiving service and requires a clinical record.

1.2 From Maintain Client Relationships screen, click on Create Non-Indexed Client.

1.3 From Maintain Non-Indexed Client screen, enter data into the required fields (*) in each section, and any other fields as per business standards.

1.4 Click Submit button.

TIP: In the **Relationship to In-context Client** section, the **Relationship** field is meant to capture, in this example, the mother's relationship to the client in context (header information).

In the **Relationship from In-context Client** section, the **Inverse Relationship** is captured. This field is auto-populated based on the value in the **Relationship to In-Context Client** field.

NOTE: Appendix A lists Relationships and Inverse Relationships.

TIP: Don't forget to click the **Add** button after entering data into the **Address** fields. Multiple addresses can be added into the factory table.

Maintain Non-Indexed Client

? 📄 ACTIVE

Client ID: 432	Name(First,Middle,Last)/Gender: Garry JS-Gorilla / Male	Health Card No: -	Date of Birth / Age: 2014 Jan 14 / 7 mos 5 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

* Last Name: JS-Gorilla * First Name: Samantha

* Relationship to in-context Client: Mother * Relationship from in-context Client: Child

* Effective From Date: 2014 / 01 / 14 Effective To Date: / /

yyyy mm dd yyyy mm dd

Custodial

Telephone Number

Phone Number Type: Phone Number: International () - ext

Addresses

[Hide Addresses](#)

Address Type: Country: Canada

Address: Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: City: Postal Code:

Effective From: 2014 / 08 / 19 To: / /

yyyy mm dd yyyy mm dd

Add **Clear**

Address Type	Address	Effective From	Effective To	Preferred
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Comments

Comment:

(2000 characters) **Add**

Date	Comment	Recorded By
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Custodial History

From Date: To Date:

Submit **Clear** **Cancel**

The second method of adding a relationship is to link two existing client records together (e.g. a mother and a child). This method first requires that one of the client records is in context. Follow previous steps 1.1 (From LHN select Relationships).

Maintain Client Relationships ? [Print]

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie Hide Relationship Detail

This Client has 0 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions: View / Update Remove Relationship Find Client and Add as a Relationship Create Non-indexed Client

Name	Relationship to in-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial

1.2 From Maintain Client Relationships screen, click on Find Client and Add as a Relationship. The Basic Search Criteria screen displays.

TIP: To quickly locate a client record, search on the client's telephone number. This must be done through Advanced Search. The search may result in multiple family members if they share the same primary home number.

Search Clients ? [Print]

[Search Jurisdictional Registry](#)

Basic Search Criteria Hide Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Phonetic Matches
 Exclude Indeterminate Clients
 Include Inactive Clients
 Display Results on Single Page

Client Number:
(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: **First Name:** **Middle Name:**

Gender:

Date of Birth or Age Hide Date of Birth or Age

Not Applicable
 Date of Birth / /
yyyy mm dd
 Age
Year(s) Units
 Date of Birth From / / To / /
yyyy mm dd yyyy mm dd

Jurisdictional Organization: Exact Match
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] Find

Search Retrieve Clear [Advanced Search](#)

- 1.3 Enter search criteria for client (in this example, the mother's client record), then select Search. (Refer to the **Search Client** User Guide for more detailed information).
- 1.4 Scroll to the bottom of the page and view Client Index: Search Results section.
- 1.5 Select the appropriate Client ID radio button from the table to select the client, then click Select and Return.

Maintain Client Relationships screen redisplay with the client information populated in the header section, as shown in the screenshot.

- 1.6 From Maintain Client Relationships screen, scroll to Relationship Detail section.

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie ↑ Hide Relationship Detail

This Client has 0 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:	<input type="button" value="View / Update"/> <input type="button" value="Remove Relationship"/>	<input type="button" value="Find Client and Add as a Relationship"/> <input type="button" value="Create Non-Indexed Client"/>
---------------------	---	---

Name	Relationship to In-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial

Relationship Detail ✓ Contains Data ↑ Hide Relationship Detail

* Required Field

Last Name: JS-Kangaroo **First Name:** Martha **Middle Name:** **Client ID:** [464](#)
Gender: Female **Date Of Birth:** 1975 Aug 23 **Indeterminate:** No

* Relationship to in-context Client: * Relationship from in-Context Client:

* Effective From: / / Effective To: / /

Validated Custodial

Comments:

(2000 characters)

Date	Comments	Recorded By

- 1.7 Enter data for mandatory and required fields in the Relationship Detail section such as the Relationship, Inverse Relationship and Effective From Date, then click Submit.

Note: Effective from date should be the DOB for birth parents, and the actual effective from date for guardianship changes.

The Maintain Client Relationships page re-displays with an updated Summary of Relationships to Client section.

NOTE: Recent Work functionality provides the ability to see a list of up to 6 most recent and unique contexts, and easily navigate back to those contexts.

TIP: When creating newborn records, be sure to add the phone number. Household functionality only copies address information, not phone numbers.

Maintain Client Relationships ?

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie Contains Data Hide Relationship Detail

This Client has 1 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:	<input type="button" value="View / Update"/> <input type="button" value="Remove Relationship"/>	<input type="button" value="Find Client and Add as a Relationship"/> <input type="button" value="Create Non-Indexed Client"/>
---------------------	---	--

	Name	Relationship to In-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
<input type="radio"/>	JS-Kangaroo, Martha	Mother	1975 Aug 23	Female	(306) 333-4944	2014 Feb 23		

2.0 View/Update Relationship

Pre-requisites: User is in the Immunization module (tab).

A client record is in context, and has at least one Relationship

2.1 From the left-hand navigation under the Client Section, select Relationships. Maintain Client Relationships screen displays.

Maintain Client Relationships ?

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie ✓ Contains Data ^ Hide Relationship Detail

This Client has 1 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:	<input type="button" value="View / Update"/> <input type="button" value="Remove Relationship"/>	<input type="button" value="Find Client and Add as a Relationship"/> <input type="button" value="Create Non-Indexed Client"/>
---------------------	---	---

	Name	Relationship to In-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
<input type="radio"/>	JS-Kangaroo, Martha	Mother	1975 Aug 23	Female	(306) 333-4944	2014 Feb 23		

2.2 User selects an existing relationship by clicking on radio button and selects **View/Update** button.

2.3 The relationship information on the **Relationship Detail** section of the **Maintain Client Relationships** screen displays and allows editing of: [Relationship To In-Context Client], [Relationship From In-Context Client], [Effective To], [Effective From], [Comment], [Custodial Relationship], and [Validated indicator].

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie Hide Relationship Detail

This Client has 0 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions:

Name	Relationship to in-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
No relationships found.							

Relationship Detail Contains Data Hide Relationship Detail

* Required Field

Last Name: JS-Kangaroo **First Name:** Martha **Middle Name:** **Client ID:** [464](#)
Gender: Female **Date Of Birth:** 1975 Aug 23 **Indeterminate:** No

* Relationship to in-context Client:
 * Relationship from in-Context Client:

* Effective From: / /
 yyyy mm dd

Effective To: / /
 yyyy mm dd

Validated Custodial

Comments:

(2000 characters)

Date	Comments	Recorded By
No comments found.		

2.4 Change relationship information as required and then click **Submit**.

3.0 Remove Relationship



Caution: Ensure you are following clinical documentation best practice guidelines when deleting records.

Pre-requisites: User is in the Immunization module (tab).

A client record is in context, and has at least one Relationship

From the left-hand navigation under the Client Section, select Relationships. Maintain Client Relationships screen displays.

3.1 User selects an existing relationship by clicking on radio button and selects **Remove Relationship** button.

Maintain Client Relationships ?

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 27 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Summary of Relationships to Client: JS-Kangaroo, Katie ✓ Contains Data ^ Hide Relationship Detail

This Client has 1 recorded Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

Row Actions: View / Update Remove Relationship

Find Client and Add as a Relationship
Create Non-Indexed Client

	Name	Relationship to in-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
<input type="radio"/>	JS-Kangaroo, Martha	Mother	1975 Aug 23	Female	(306) 333-4944	2014 Feb 23		

3.2 The System displays a prompt to confirm deletion of relationship, e.g., “The relationship with <related client name> will be deleted. Confirm or Cancel.”

3.3 The User confirms the delete by selecting **OK**.

3.4 The System deletes the in context Client relationship and related Client's inverse relationship.

3.5 A message is displayed indicating successful deletion of the relationship.

4.0 Create Households

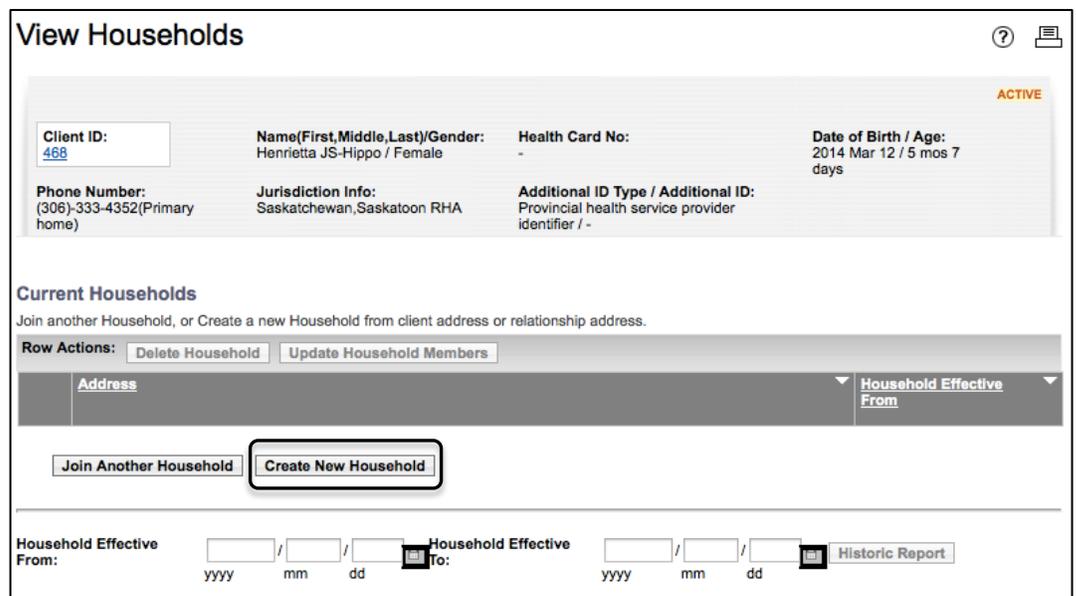
Pre-requisites: User is in the Immunization module (tab).

At least one Relationship exists for the in context Client.

The Client in context has at least one active address, or at least one relationship has an active address.

4.1 From the left-hand navigation under the Client Section, select Households.

The View Households page displays, with the client in context information in the header section, as shown in the screenshot.



View Households ? [List Icon]

ACTIVE

Client ID: 488	Name(First,Middle,Last)/Gender: Henrietta JS-Hippo / Female	Health Card No: -	Date of Birth / Age: 2014 Mar 12 / 5 mos 7 days
Phone Number: (306)-333-4352(Primary home)	Jurisdiction Info: Saskatchewan, Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Current Households
Join another Household, or Create a new Household from client address or relationship address.

Row Actions:

Address	Household Effective From

Household Effective From: [] / [] / [] [] Household Effective to: [] / [] / [] []

TIP: Display Active Only displays active address; **Display All** displays all active and inactive addresses.

4.2 Select Create New Household, as shown in the screenshot.

The Create New Household page displays for the client in context, as shown below.

Create New Household ? [Print]

ACTIVE

Client ID: 468	Name(First,Middle,Last)/Gender: Henrietta JS-Hippo / Female	Health Card No: -	Date of Birth / Age: 2014 Mar 12 / 5 mos 7 days
Phone Number: (306)-333-4352(Primary home)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Relationship Addresses

Display: Active Addresses Only All Addresses Display

Select a relationship address to become the address of the Household: Click on Name to view Client. Click on radio button to select.

	Name	Relationship to Client in Context	Address	Household Member Preferred Phone	Status
<input checked="" type="radio"/>	JS-Hippo, Henrietta	SELF	Street No. 533 Avoco Street Saskatchewan Canada S7L2L0	(306) 333-4352	Active

Continue Cancel

- 4.3 Select the relationship address to be used as the address of the Household. Select Continue.

- 4.4 The Maintain Household Memberships page displays with the household address and the clients who have a relationship with the client in context, as shown below.

Maintain Household Memberships ?

ACTIVE

Client ID: 488	Name(First,Middle,Last)/Gender: Henrietta JS-Hippo / Female	Health Card No: -	Date of Birth / Age: 2014 Mar 12 / 5 mos 7 days
Phone Number: (306)-333-4352(Primary home)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Household Address:
Street No. 5666 12th Street Saskatchewan Canada S7L2K2

Household Members Remove in Context Client from Household

Row Actions: Remove Client from Household Search and Add Client to Household Show Historical Household Members

	Name	Relationship to Client in Context	Household Effective From	Household Effective To	Household Member Preferred Address	Household Member Preferred Phone
<input type="checkbox"/>	JS-Hippo, Valene	Mother	2014 Aug 19		Street No. 5666 12th Street Saskatchewan Canada S7L2K2	

Related Clients Eligible for Household Inclusion ↑ Hide Related Clients

Row Actions: Add Related Client to Household

Name	Relationship to Client in Context	Related Client Preferred Address	Related Client Preferred Phone

Close

- 4.5 In the Household Members table, displays the clients within the household address.
- 4.6 If there are any other clients with a Relationship to the client, this client(s) will be displayed in **Related Clients Eligible for Household Inclusion**. Select these clients and click **Add Related Client to Household**, as required.
- 4.7 Click Close. A message is displayed indicating successful addition to the household.

6.0 Update Household Members

Pre-requisites: User is in the Immunization module (tab).

At least one Relationship exists for the in-context Client.

The Client in context has at least one active address, or at least one relationship has an active address.

6.1 From the left-hand navigation under the Client Section, select Households.

The View Households page displays, with the client in context information in the header section.

View Households

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ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 28 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Current Households

Join another Household, or Create a new Household from client address or relationship address.

Row Actions: Delete Household Update Household Members

	Address	Household Effective From
<input checked="" type="radio"/>	Street No. 555 Fifth Street Saskatoon, Saskatchewan Canada S7L2L0	2014-08-20

Join Another Household Create New Household

Household Effective From: / / Household Effective To: / / Historic Report

TIP: Click **Search and Add Client** to add new members to the Household. These members need not have a relationship with any other member of the household. They do not need to have an address on file.

TIP: If the household member is not found, the user may create a new client record, which will then be automatically added to the Household that is being updated.

6.2 Select the appropriate address radio button from the table and select Update Household Members.

The Maintain Household Memberships page displays with the Household Address and the Household Members table.

6.3 To Remove Client from Household, select checkboxes in the Household Members table indicate members of this household address. Then click Remove Client from Household.

TIP: Always perform a thorough search before creating a new client record. Follow the appropriate jurisdictional guidelines in order to reduce the creation of duplicate records.

- 6.4 To **Add a New Member** to the Household, click **Search and Add Client**. This takes you to the **Search Clients** screen. Once the client is found, select the radio button and click **Select and Return**. If the client is not found, create a new client.
- 6.5 The **Maintain Household Memberships** screen is displayed.

Maintain Household Memberships ?

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 28 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Household Address:
Street No. 555 Fifth Street Saskatoon, Saskatchewan Canada S7L2L0

Household Members Remove in Context Client from Household

Row Actions: Remove Client from Household Search and Add Client to Household Show Historical Household Members

	Name	Relationship to Client in Context	Household Effective From	Household Effective To	Household Member Preferred Address	Household Member Preferred Phone
<input type="checkbox"/>	JS-Apple, Fruit	Sibling	2014 Aug 20		Street No. 333 Three Street Saskatoon, Saskatchewan Canada S7K0W2	(306) 555-4321
<input type="checkbox"/>	JS-Kangaroo, Bob	Child	2014 Aug 20		Street No. 222 Vintner Street Saskatoon, Saskatchewan Canada S7T2K0	(306) 333-5444
<input type="checkbox"/>	JS-Kangaroo, Richard		2014 Aug 20		Street No. 555 Fifth Street Saskatoon, Saskatchewan Canada S7L2L0	
<input type="checkbox"/>	JS-Crocodile, Christopher		2014 Aug 20		Street No. 333 Frost Freeway Saskatoon, Saskatchewan Canada S7N3L0	(306) 222-5332
<input type="checkbox"/>	JS-Kangaroo, Martha	Mother	2014 Aug 19		Street No. 555 Fifth Street Saskatoon, Saskatchewan Canada S7L2L0	(306) 333-4944

Related Clients Eligible for Household Inclusion Show Related Clients

Close

6.6 To remove client in context from the Household, select Remove in Context Client from Household. The View Households page redisplay with updated information.

NOTE: If you **Remove In-Context Client** from Household, the client will be removed from the household. The Household will still exist for the remaining members, and can be accessed by putting one of those household members in-context, and selecting **Household** from the LHN.

View Households ?

ACTIVE

Client ID: 459	Name(First,Middle,Last)/Gender: Katie JS-Kangaroo / Female	Health Card No: -	Date of Birth / Age: 2014 Feb 23 / 5 mos 28 days
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

The in-context Client is successfully removed from the Household.

Current Households

Join another Household, or Create a new Household from client address or relationship address.

Row Actions: Delete Household Update Household Members

Address	Household Effective From

Join Another Household Create New Household

Household Effective From: / / Household Effective To: / / Historic Report

The household is no longer displayed because the Client in Context is no longer within that household. The household still exists for the other members. In order to see that household, go to **Client Search**, search for one of the other household members, and put the client in context, and then from the LHN, select **Household**. It will still exist for that client and the others.

NOTE: If a client has a relationship with another client that is currently in a Household; then the client could “Join Another Household”. The client in context must have a relationship with one member of the household that she will be joining.

In order to add non-relatives to a household, just add these clients through the **Maintain Household Membership** screen (see section 6).

7.0 Join Another Household

Pre-requisites: User is in the Immunization module (tab).

At least one Relationship exists for the in context Client.

The Client in-context has at least one active address, or at least one relationship has an active address.

7.1 From the left-hand navigation under the Client Section, select Households.

The View Households page displays, with the client in context information in the header section.

7.2 Select Join Another Household.

The Join Households page displays with Relationship Households table.

View Households

? ☰

ACTIVE

Client ID: 526	Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male	Health Card No: -	Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos
Phone Number: -(-)	Jurisdiction Info: Saskatchewan, Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

The Household is successfully deleted.

Current Households

Join another Household, or Create a new Household from client address or relationship address.

Row Actions: Delete Household Update Household Members

Address	Household Effective From

Join Another Household
Create New Household

Household Effective From: / / **Household Effective To:** / /

7.3 Select a relationship's household to join by selecting the radio button next to the client's name and select Continue.

Join Households

ACTIVE

Client ID: [526](#)
Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male
Health Card No: -
Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos
Phone Number: -(-)
Jurisdiction Info: Saskatchewan,Saskatoon RHA
Additional ID Type / Additional ID: Provincial health service provider identifier / -

Relationship Households

Select a relationship's Household to join: Click on Name to view Client. Click on radio button to select.

	Name	Address of Household	Relationship to Client in Context	Household Member Preferred Phone
<input checked="" type="radio"/>	JS-Crocodile, Christopher	Street No. 5533 Australia Street Saskatoon, Saskatchewan Canada S7L3L3	Sibling	(306) 222-5332

7.4 The Maintain Household Memberships displays. The message displays that the In-Context Client has been added to the Household. Select Close to View the View Households screen for the client in context.

Maintain Household Memberships

ACTIVE

Client ID: [526](#)
Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male
Health Card No: -
Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos
Phone Number: -(-)
Jurisdiction Info: Saskatchewan,Saskatoon RHA
Additional ID Type / Additional ID: Provincial health service provider identifier / -

The in-context Client has successfully joined the selected Household.

Household Address:
Street No. 5533 Australia Street Saskatoon, Saskatchewan Canada S7L3L3

Household Members

Row Actions:

	Name	Relationship to Client in Context	Household Effective From	Household Effective To	Household Member Preferred Address	Household Member Preferred Phone
<input type="checkbox"/>	JS-Crocodile, Christopher	Sibling	2014 Aug 20		Street No. 333 Frost Freeway Saskatoon, Saskatchewan Canada S7N3L0	(306) 222-5332
<input type="checkbox"/>	JS-wallabe, William		2014 Aug 20		Street No. 5533 Australia Street Saskatoon, Saskatchewan Canada S7L3L3	
<input type="checkbox"/>	JS-Wallabe, Willemena		2014 Aug 20		Street No. 5533 Australia Street Saskatoon, Saskatchewan Canada S7L3L3	
<input type="checkbox"/>	JS-Kangaroo, Martha		2014 Aug 20		Street No. 555 Fifth Street Saskatoon, Saskatchewan Canada S7L2L0	(306) 333-4944

Related Clients Eligible for Household Inclusion

Appendix A: New Relationship Value Sets (ER 590C Inverse Relationship in Household)

New relationship Value Sets	
Relationship	Inverse Relationship
Parent	Child
Mother	Child
Father	Child
Child	Parent, Mother, Father
Step Parent	Step Child
Step Child	Step Parent
Foster Parent	Foster Child
Foster Child	Foster Parent
Legal Guardian	Legal Guardian Child
Legal Guardian Child	Legal Guardian
Sibling	Sibling
Spouse	Spouse
Grandparent	Grandchild
Grandchild	Grandparent
Aunt	Nephew, Niece
Uncle	Nephew, Niece
Nephew	Aunt, Uncle
Niece	Aunt, Uncle
Cousin	Cousin
Friend	Friend
Relation	Relation