

THEO Database: How to Establish Relationships between Clients

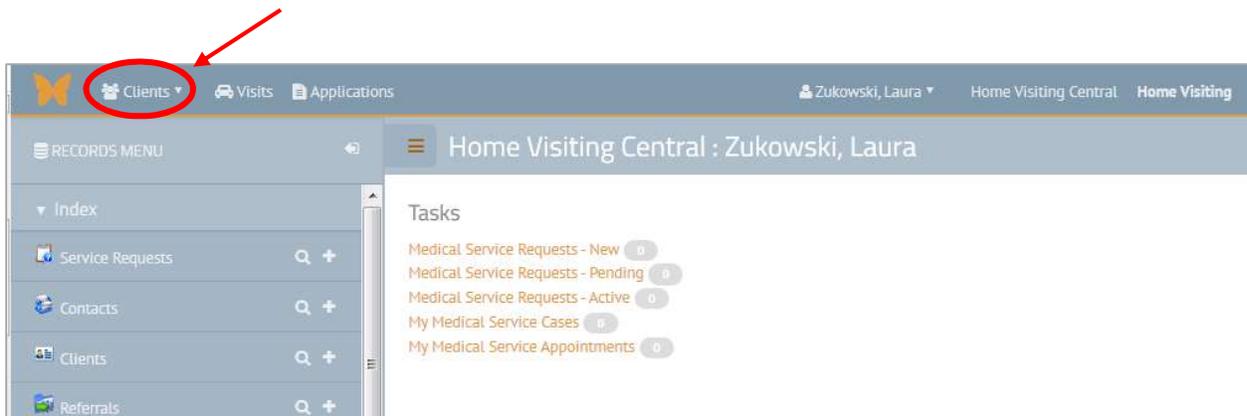
These instructions show how to link together two clients and define the relationship between them. The example below uses a mother and child.

Go to <https://oregon.vistalogic.net/Clara>

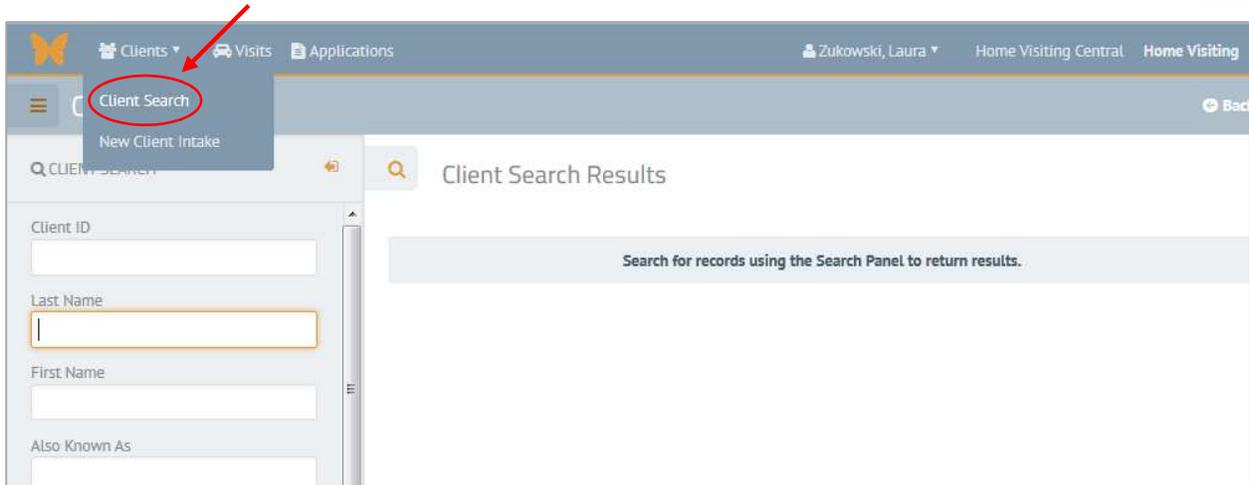
Log in with using your e-mail address as your user name and the password you created.



Click on the butterfly to go to your HOME screen.



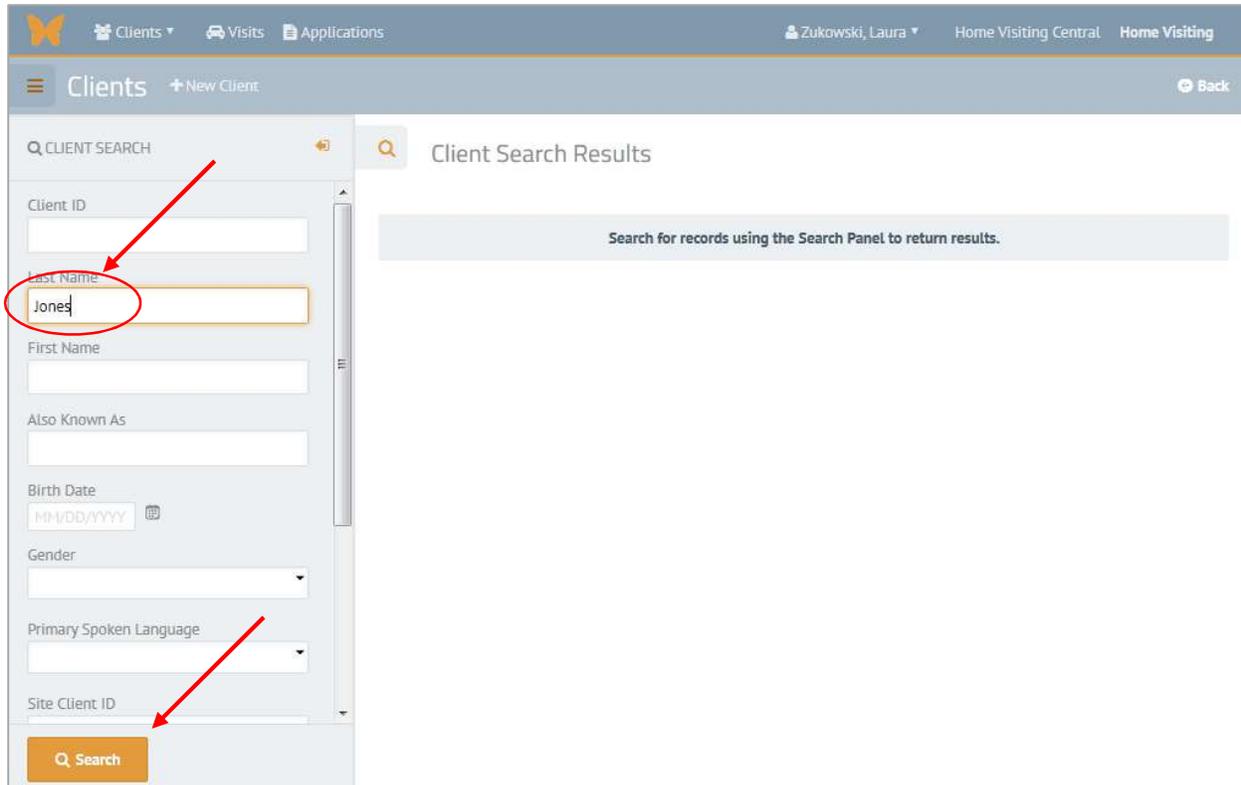
Search for one of your clients by clicking on the “Clients” menu in the top right area of your screen.



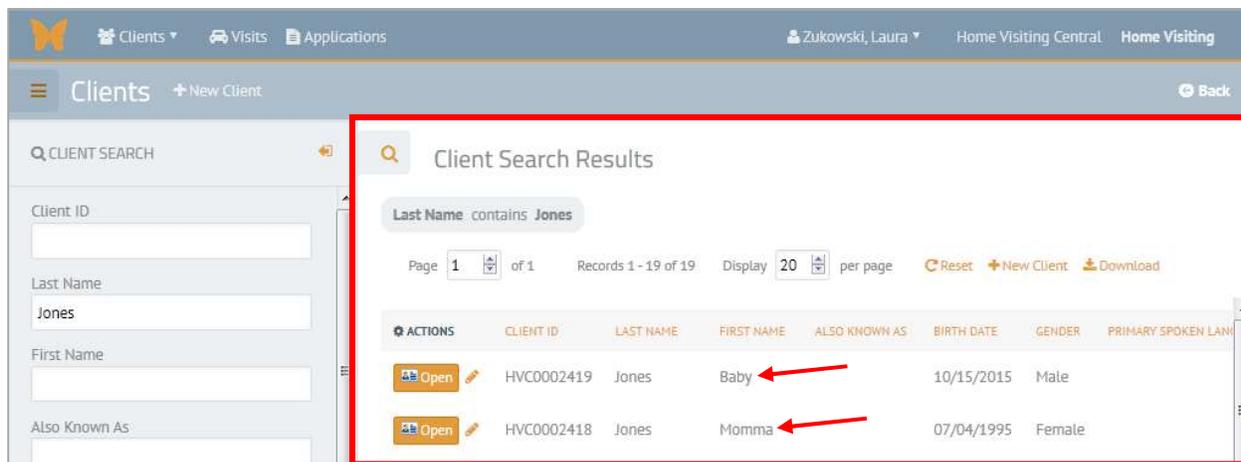
A menu opens with two choices. Click on “Client Search”.



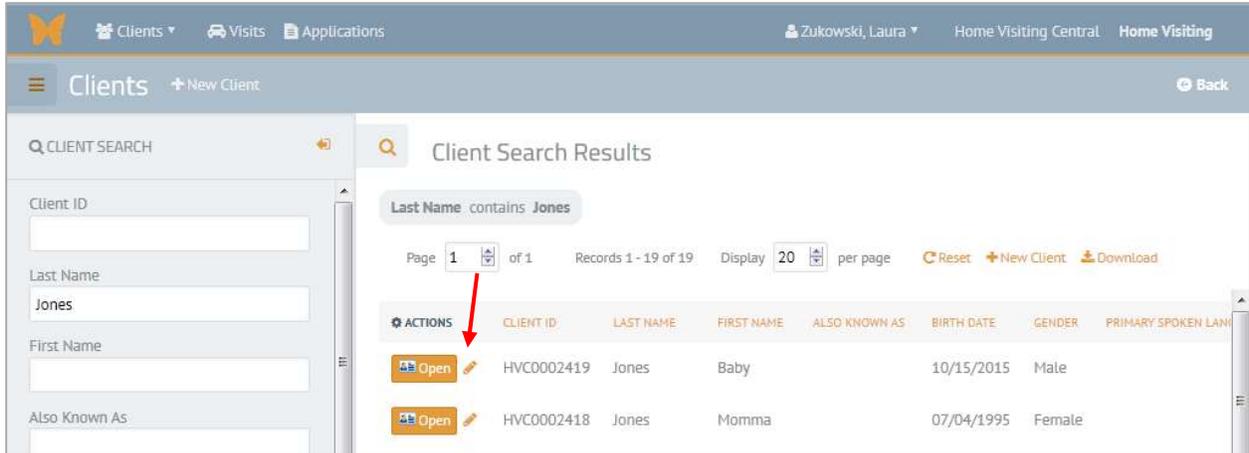
The “Client Search” screen opens.



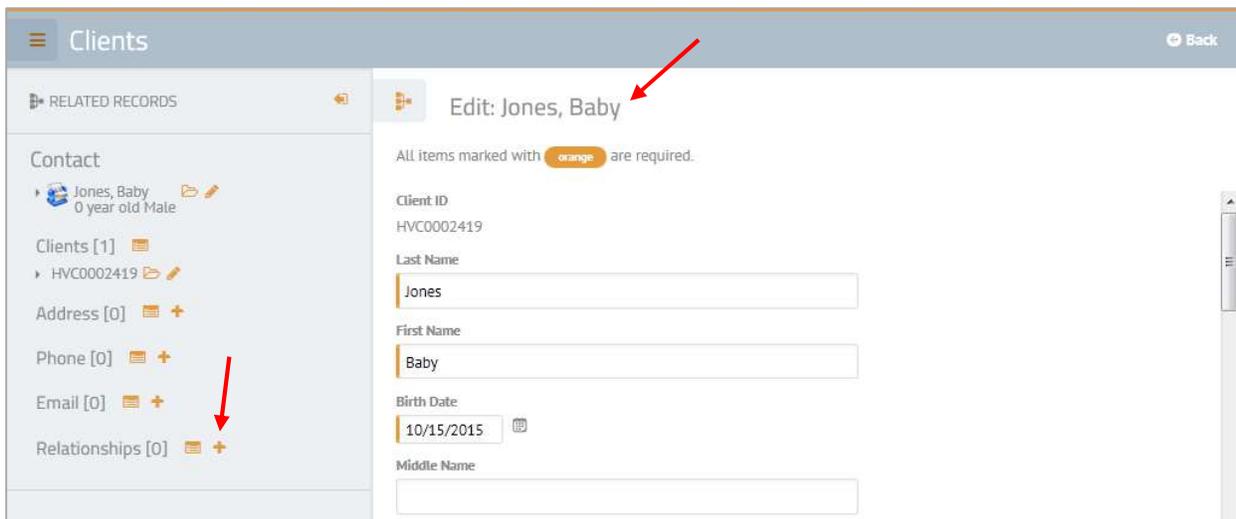
Type the client’s last name, or part of the client’s last name, in the “Client Search” panel. Click on the “Search” button or press the “Enter” key on your keyboard.



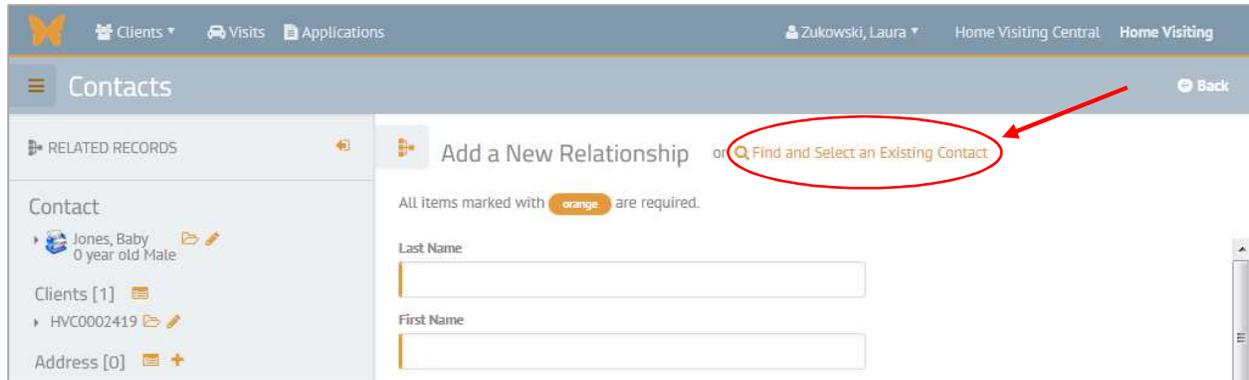
Search results appear on the right side of the screen. Clients Baby Jones and Momma Jones are showing in the Client Search results above, because their last names match what was entered in the “Last Name” search field in the left panel of the screen.



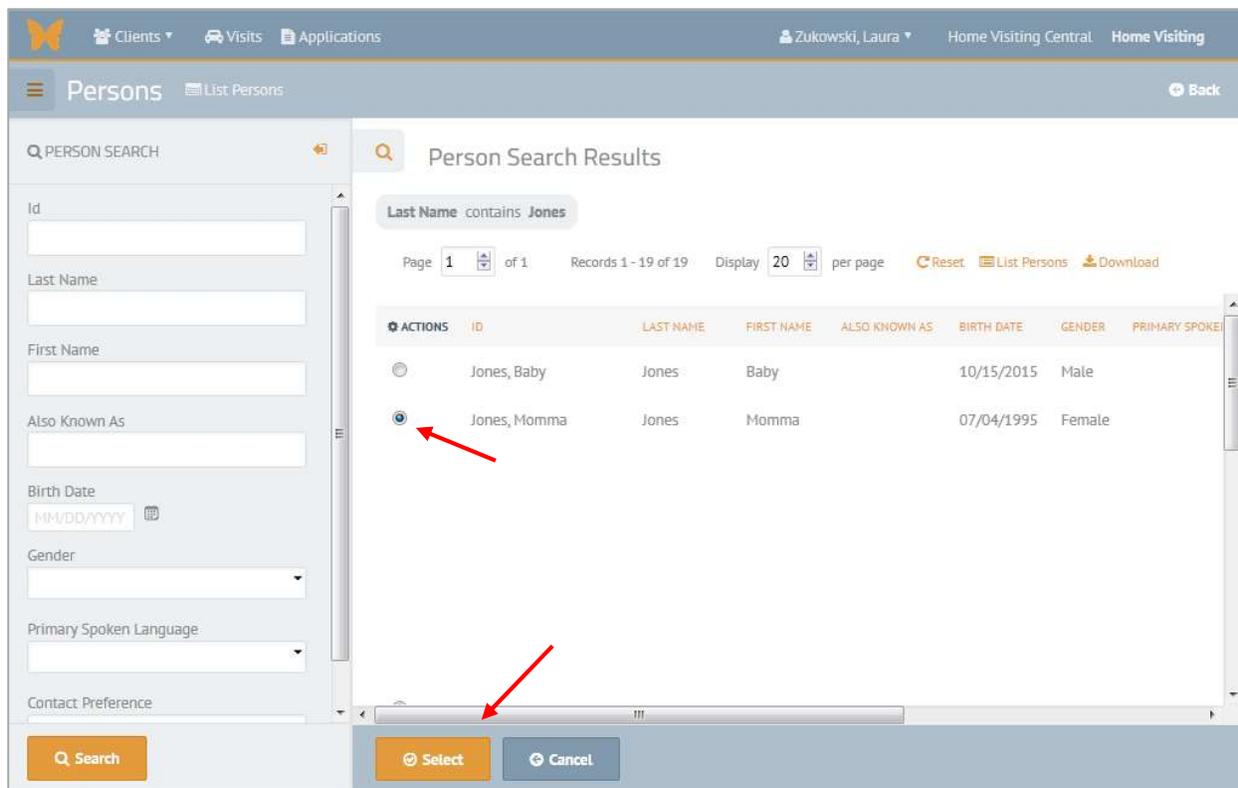
Click on the pencil icon to edit the Client Record for Baby Jones.



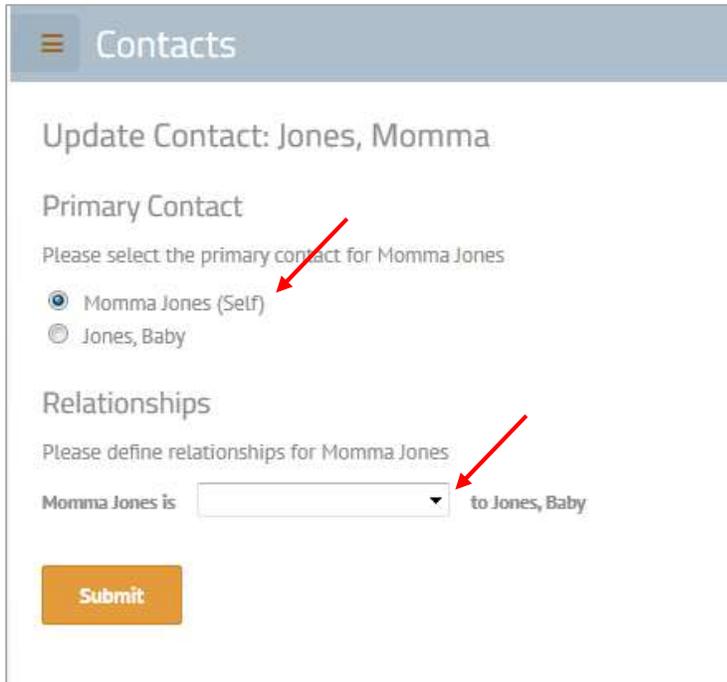
The “Edit: Jones, Baby” screen opens. Click on the “+” (plus) symbol to the right of “Relationship” link in the left panel.



The “Add a New Relationship” menu opens. Click on the link called, “Find and Select an Existing Contact”.



The “Person Search Results” screen opens, which shows all the clients in the system in the right panel. Select the person you want to relate to Baby Jones by clicking on the radio button to the left of that person’s name. Click on the “Select” button.



Contacts

Update Contact: Jones, Momma

Primary Contact

Please select the primary contact for Momma Jones

Momma Jones (Self)

Jones, Baby

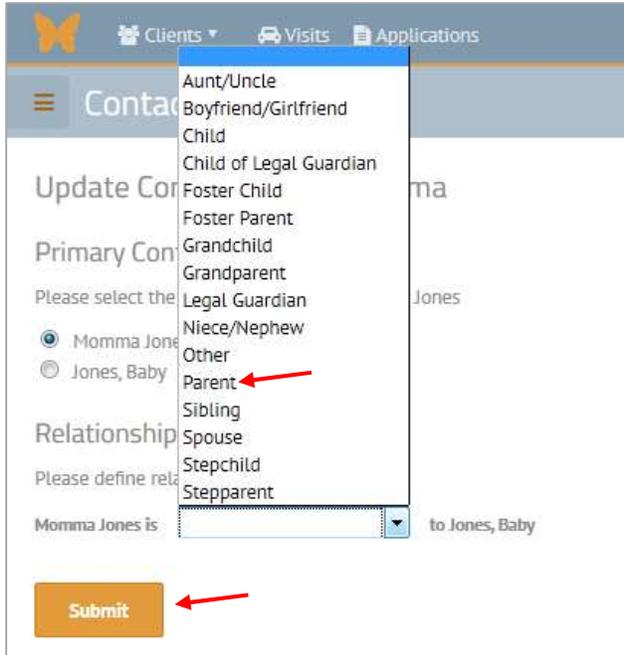
Relationships

Please define relationships for Momma Jones

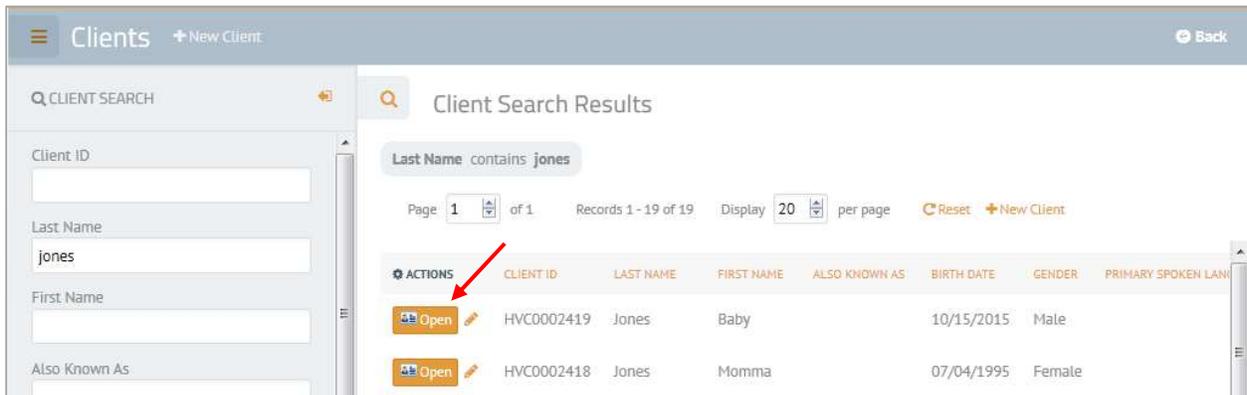
Momma Jones is to Jones, Baby

The “Contact” screen opens. There are two decisions you need to make on this screen. First, select the “Primary Contact” for Momma Jones. Because she is an adult, the system suggests that Momma Jones is her own primary contact. You can change this selection by clicking on the radio button to the left of Baby Jones’ name.

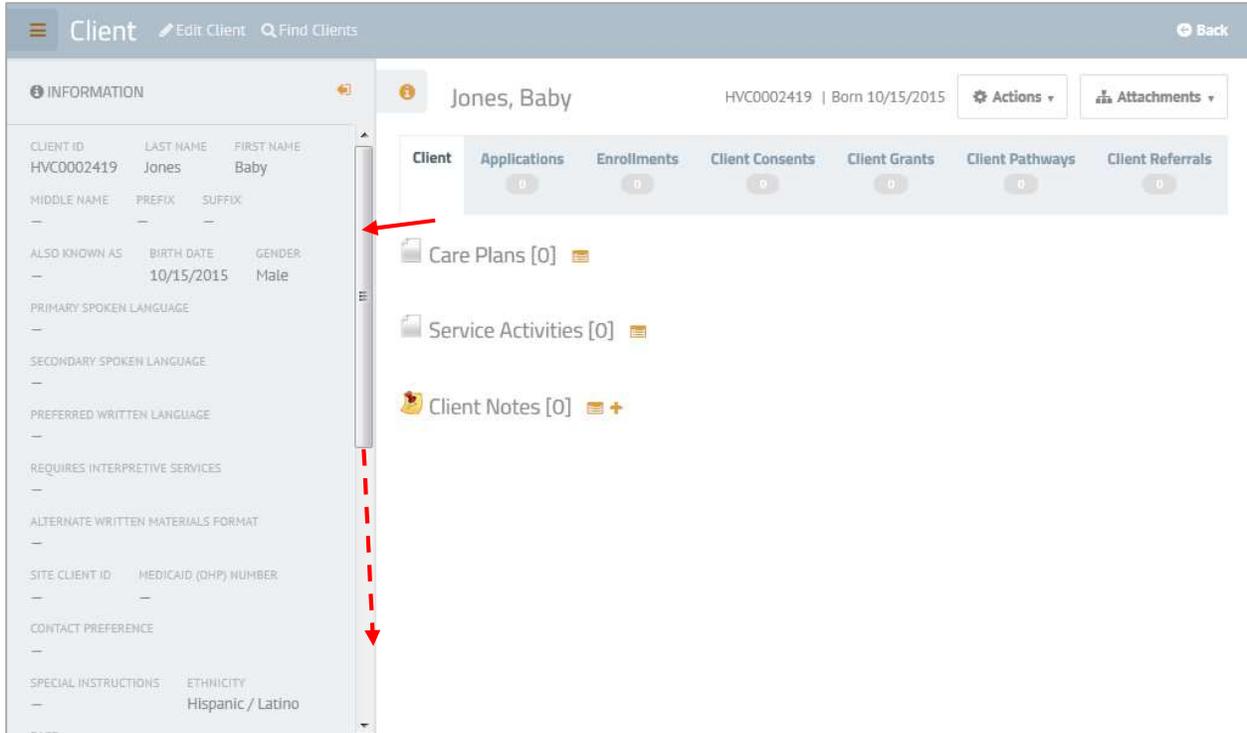
The second decision you need to make is to select the relationship that accurately describes what Momma Jones is to Baby Jones. Click on the upside down triangle in the field under “Relationships”.



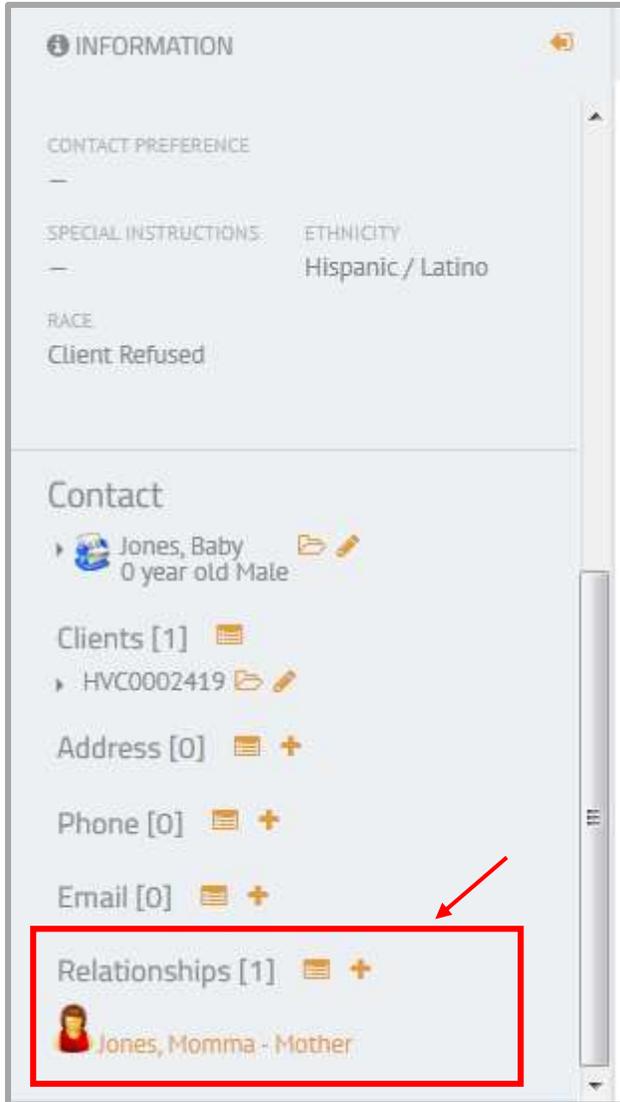
A drop-down menu opens up with a list of relationships. Click on “Parent” and then click on the “Submit” button.



The “Client Search Results” screen opens again. Click on the “Open” icon on the row for Baby Jones.



A screen opens that shows the client record for Baby Jones. Click on the sliding bar to the right of the “Information” panel. Slide the bar all the way down.



View the relationships for Baby Jones at the bottom of the “Information” panel. Momma Jones is defined as the mother of Baby Jones.

Click on top of “Jones, Momma – Mother”.

The screenshot shows a web application interface for a client record. At the top, there is a navigation bar with the word "Client" and options like "Open Client", "Edit Client", and "Find Clients". Below this, the left sidebar is titled "RELATED RECORDS" and contains sections for "Contact", "Clients [1]", "Address [0]", "Phone [0]", "Email [0]", and "Relationships [1]". The "Relationships [1]" section is highlighted with a red rectangular box, and a red arrow points to it from the right. The main content area on the right displays the client's name "Jones, Momma", ID "HVC0002418", and birth date "Born 7/4/1995". Below this, there is a list of relationship types, each with a count in brackets and a plus sign: "Care Plans [0]", "Applications [0]", "Enrollments [0]", "Client Consents [0]", "Client Grants [0]", "Client Pathways [0]", "Service Activities [0]", "Client Referrals [0]", and "Client Notes [0]".

A screen opens that shows a summary of the client record for Momma Jones. View the Relationships of Momma Jones. Baby Jones is listed as her son under the “Relationships” heading.