Relationship

The Relationships button is in the middle right hand of the screen.

1. If the relationship is an adult look up the person up first, by searching their date of birth, first & last name first. Link the clients by step 2 then going straight to step 8.
2. Click add relationship (green plus)
3. Enter the necessary information. Note * is required information. You cannot bypass this.
4. To add more household member, click **Add Another Household Member**
5. Click **Save Household Members.**
6. When you add a household member using the Relationship, the system auto assigned the address to this member.
7. When you delete this household member from this household, this household member still exists in the database but without an address. If this member is an adult, he/she will trigger the ROI.
8. You could also search the database for existing clients. Click Search for Existing Case.
9. Select the name, enter the necessary information then click Add Relationship.

When relationships are added **prior** to signing the ROI, the household members will be listed on the ROI.