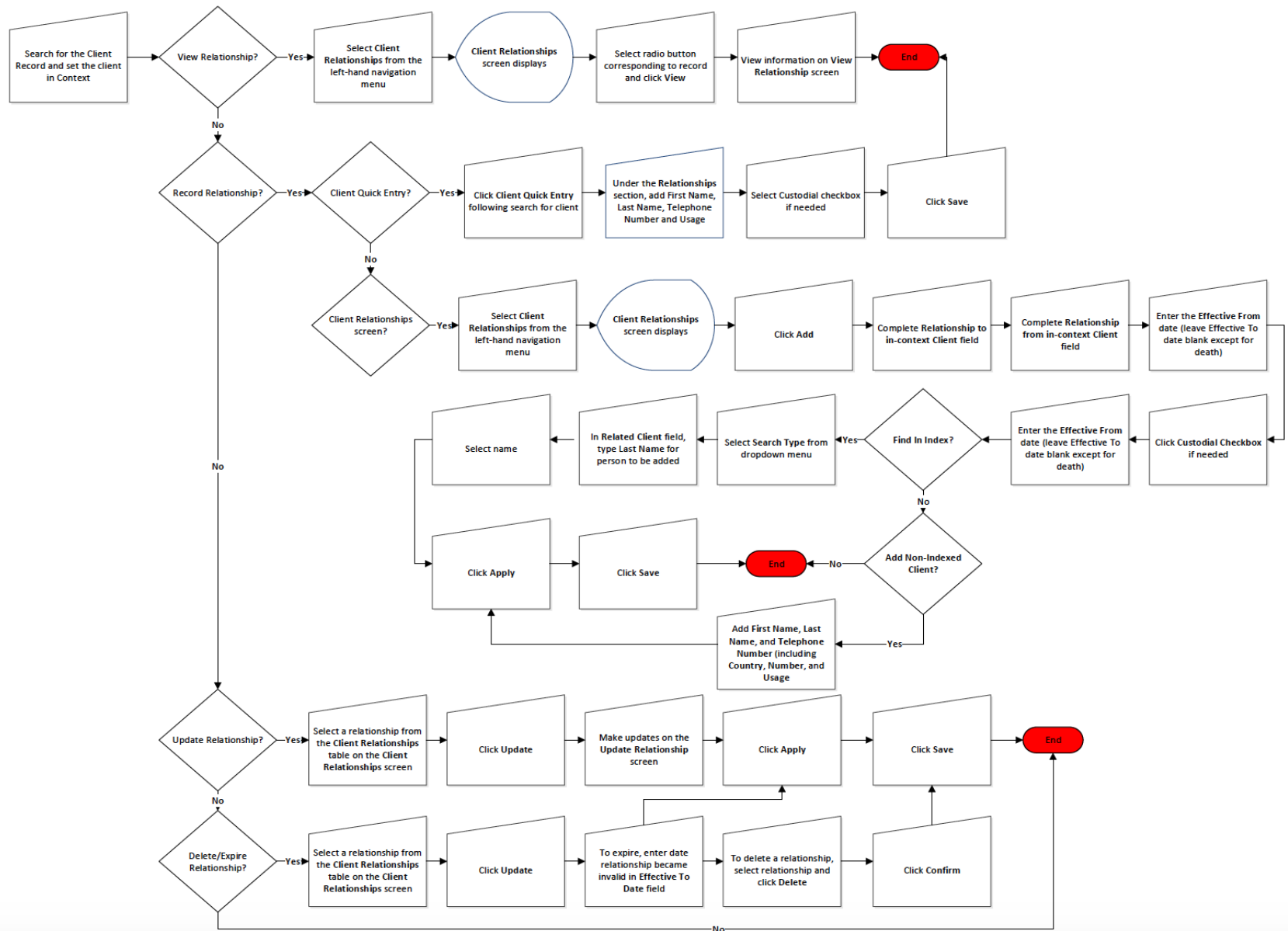


Relationships – QRC 1.5





Panorama Quick Reference Card



Points to Remember

- Information about a client's parents/guardians or siblings is stored in Panorama in the **Relationships** section. Relationships to an indexed client (i.e., a client in Panorama) may be created linking either another client in the client index or a person not recorded in the client index. The Nova Scotia Student Information System will upload relationship information for a Non-Indexed Parent.
- The **Client Quick Entry** method can be used to create a relationship with one legal guardian who is not a client in Panorama. This method is only available at the time of creating the child's record. On the **Client Quick Entry** screen, the user adds a Last Name, First Name, and one telephone number, including Usage (e.g., Primary Home).
- The **Relationship to in-context Client** field describes how this additional person is related to the client in context (e.g., a mother, father, sibling).
- The **Relationship from in-context Client** field describes the relationship of the client in context to the added relationship, e.g., child.
- When adding a relationship, leave the **Effective To** date blank. This date should only be recorded after a death and appropriate notification of death.
- If unsure whether a parent has a record in Panorama, use **Find in Index** and the **Add as a Relationship** method first.
- Panorama will not allow users to create duplicate relationships between indexed clients. An error message will be return if users inadvertently attempt to create a duplicate record.
- Users are strongly discouraged from removing any relationships other than for duplicate relationships (may have been created when duplicate parent information was recorded as part of Create Client Quick Entry process), or relationships created in error.
- If the relationship is no longer valid, it is recommended to expire the relationship by setting the **Effective To** date to the date the relationship was no longer in effect. This may be helpful to use in temporary custodianship situations.