



Relationships in Engage: Tracking Families and Households

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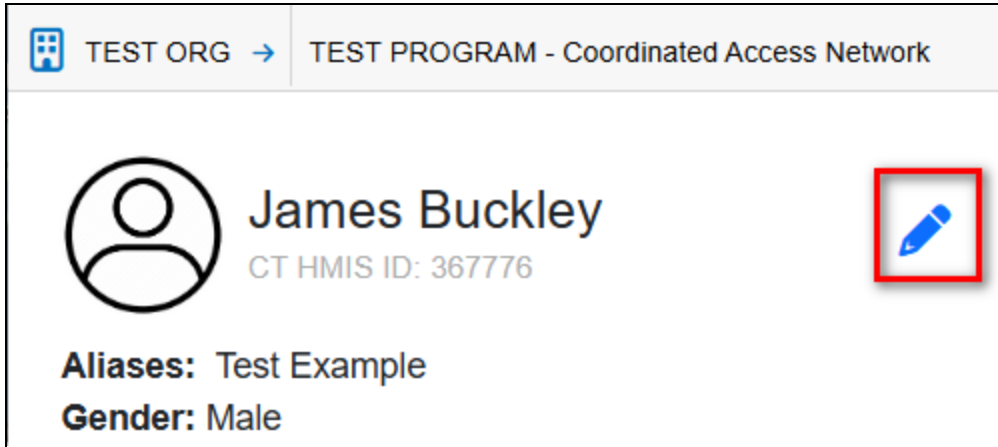
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Overview


With Relationships in Engage, you can now associate a client record with as many other records as you'd like, creating families and households in a free-form, quick and intuitive way.

Creating Relationships

1. To get started load any client's profile page, and click the EDIT icon

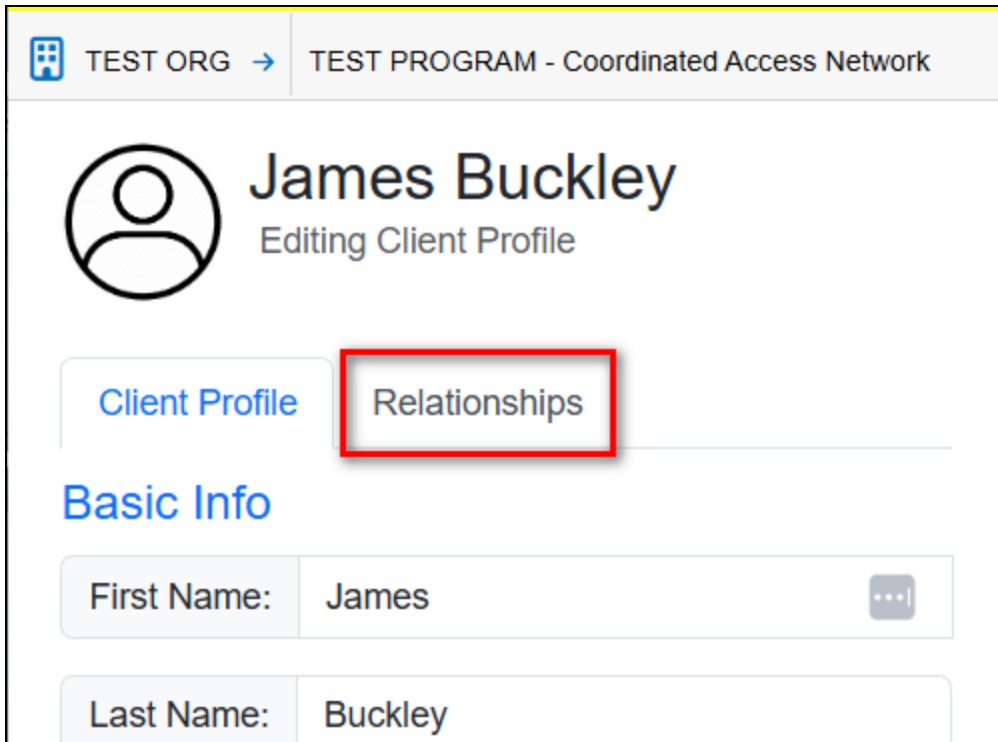


TEST ORG → TEST PROGRAM - Coordinated Access Network


 **James Buckley**
CT HMIS ID: 367776

Aliases: Test Example
Gender: Male

2. From the client profile edit page, click the relationships tab



TEST ORG → TEST PROGRAM - Coordinated Access Network

 **James Buckley**
Editing Client Profile

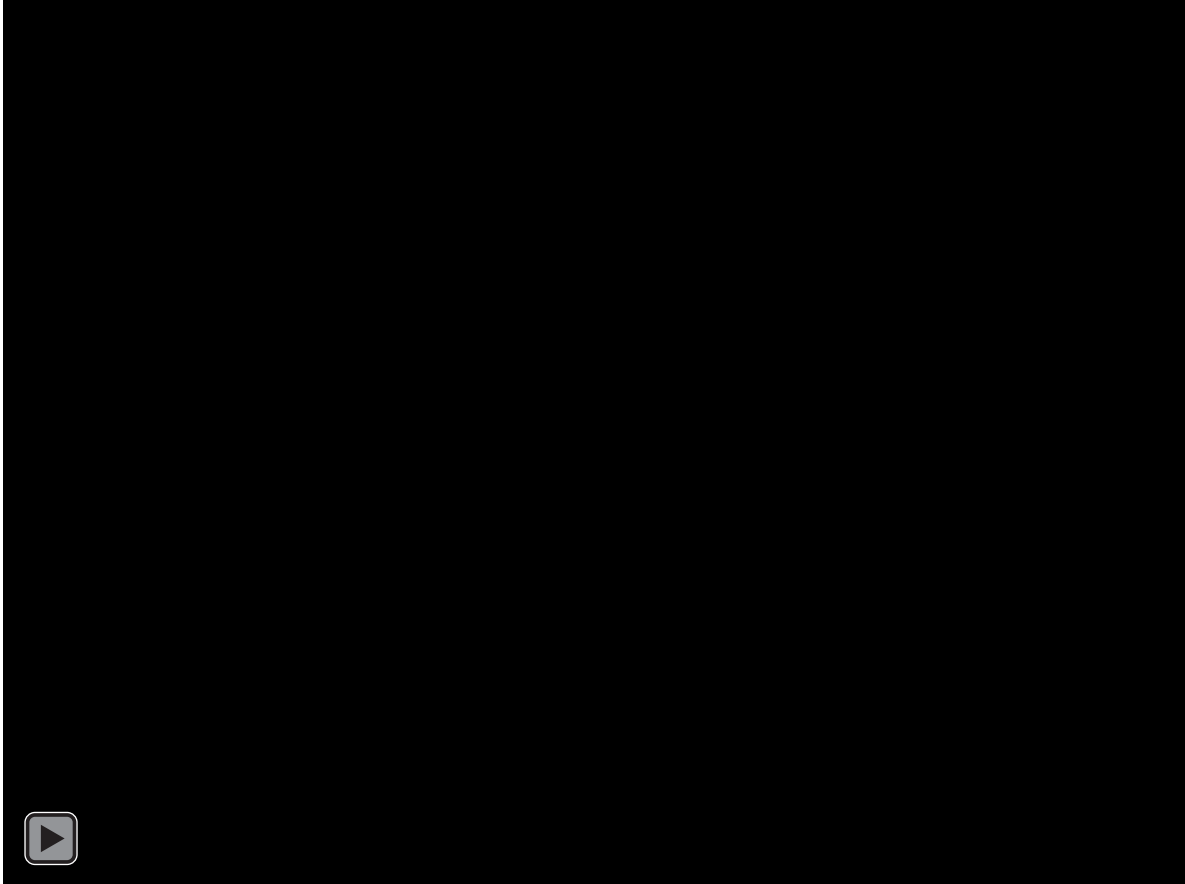
[Client Profile](#) **Relationships**

Basic Info

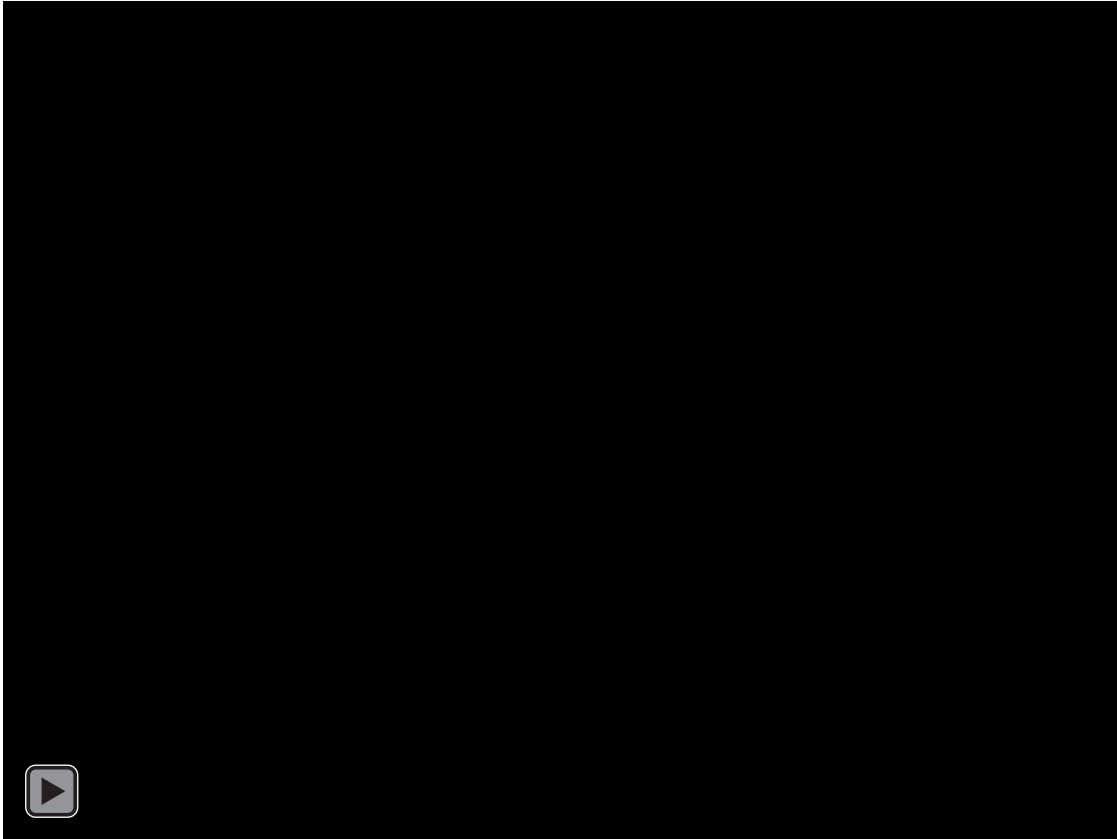
First Name: James

Last Name: Buckley

3. Add a relationship by clicking Add New Relationship, and searching for an existing client, or creating a new client.
 - a. In this short video, we illustrate how to create a new client and apply a parent's ROI to a child record.



b. In this short video, we illustrate adding an already existing client to the relationship tab.



Removing Relationships

- 4. You can also remove a client record from the household at any point by clicking the "Remove from Household" button. You will be prompted to confirm this change.

Important note: Removing a client from a relationship does NOT delete the client record, it just removes that relationship record.

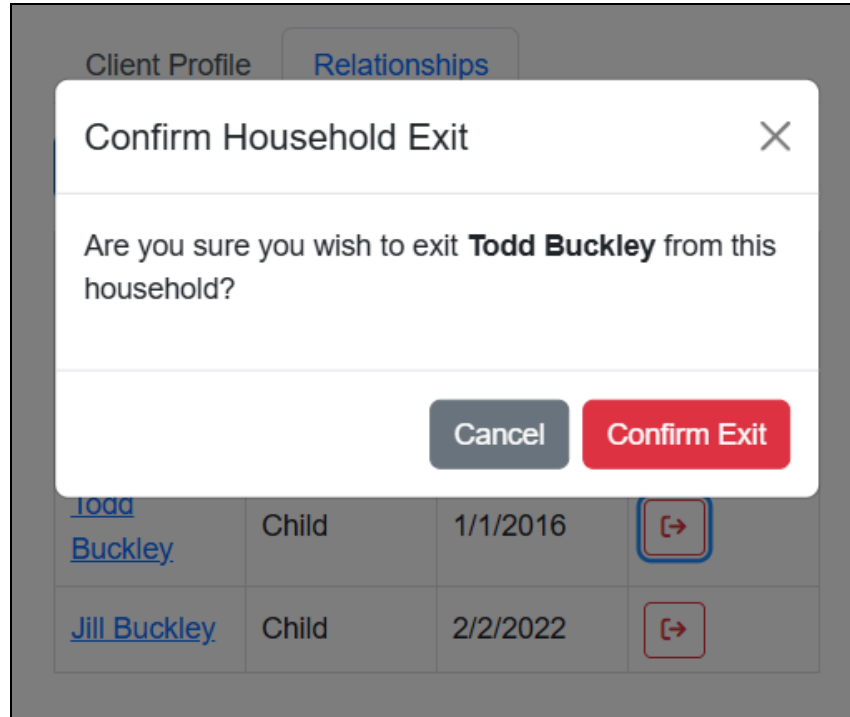
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James Buckley
Editing Client Profile

Client Profile Relationships

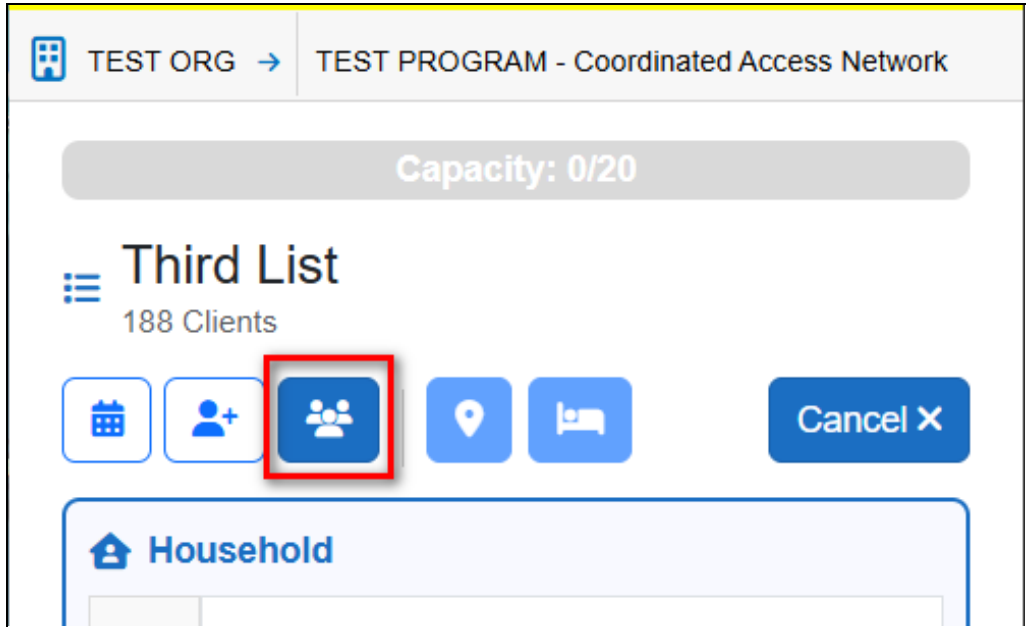
Add New Relationship

Name	Relation to HoH	Date of Birth	Actions
James Buckley	Self	—	
Todd Buckley	Child	1/1/2016	
Jill Buckley	Child	2/2/2022	



Grouping Relationships on Lists

5. Now that relationships have been created, if the clients in a relationship are on the same list, you can group them together visually by clicking on the "Toggle Relationship View" button



You'll see that clients with a relationship now group together in a "household" box visually, below them are all the clients with no relationship.

