

# Organisation Relationships

## Add an organisation relationship

The screenshot shows the 'Master Fred Gordon : Person Summary' page. A callout box with a red border and tail points to the 'Organisation Relationships' option in the 'Person Details' dropdown menu. The callout text reads: 'Move your mouse over *Person Details* then click on *Organisation Relationships*'. The page layout includes a top navigation bar with 'People', 'Organisations', 'Workers', 'Contracts', 'Finance', 'Reports', 'Tools', and 'Help'. The main content area is divided into sections: 'Person Details' (with a dropdown menu), 'Case Status' (Open 13/09/2018), 'Current Work' (with a list of roles like 'Son of Heather Gordon'), and 'File Retention' (Retain Until 12/09/2027).

The screenshot shows the 'Organisation Relationships - Master Fred Gordon (2158376)' page. The page features a table with the following columns: 'Organisation Relationships', 'From Date', 'To Date', and 'End Reason'. The table is currently empty. At the bottom right of the page, there are two buttons: 'Add' and 'OK'. A callout box with a red border and tail points to the 'Add' button. The callout text reads: 'Click on *Add*'. The top navigation bar is identical to the previous screenshot.

**Add Organisation Relationships – Master Fred Gordon (2158376)**

Fields marked with a \* are required. If you select 'To Date' a reason will also be required.

Organisation \*   **Click on *Find***

Relationship Type \*

From \*

To

**Find Organisation**

At least one field marked with a # is required

Name #  **Enter the organisation's name**

ID #

Street #

Post Code #

Other Reference #

Sector

Sub Sector

Type

**Click on *Find***

**Find Organisation**

ID	Name	Address
7501828	<a href="#">Brecknock Breakfast and After S</a>	5 CLIFF VILLAS LONDON NW1 9AL
7500011	<a href="#">Brecknock Primary Scho</a>	5 CLIFF VILLAS LONDON NW1 9AL
7501568	<a href="#">Brecknock School</a>	BRECKNOCK PRIMARY SCHOOL YORK WAY LONDON N7 9QE

**Click on the organisation**

**Add Organisation Relationships – Master Fred Gordon (2158376)**

Organisation \*   required. If you select 'To Date' a reason will also be required.

Relationship Type \*

From \*

To

**Select a Relationship Type**

**Enter the date the CYP started attending the organisation**

**Click on Save**

**Remove an organisation relationship**

People Organisations Workers Contracts Finance Reports Tools Help

**Master Fred Gordon : Person Summary**

Person Details > Basic Details  
 Start > Addresses  
 Case Notes > Telephone Numbers  
 Documents > e-mail Address  
 Events > Classes  
 Visits > Other Names  
 Education > Date of Death  
 Health > GP  
 LAC > Organisation Relationships  
 Legal Status > Personal Relationships  
 Offences > Worker Relationships  
 Registrations > Employment Status  
 References  
 Service User Groups

Case Status  
Open 13/09/2018

Relationships  
[Son of Heather Gordon \(has Parental Responsibility\)](#)  
 Heather Gordon is Main Carer for Master Fred Gordon  
[Son of Bob Gordon](#)

File Retention  
Retain Until 12/09/2027

**Move your mouse over Person Details then click on Organisation Relationships**

**Organisation Relationships – Master Fred Gordon (2158376)**

Organisation Relationships	From Date	To Date	End Reason
School: Brecknock School	14/09/2018		

**Click on the pencil**

Amend Organisation Relationships – Master Fred Gordon (2158376)

Fields marked with a \* are required. If you select 'To Date' a reason will also be required.

Organisation \*

Relationship Type \*

From \*

Enter the date the CYP stopped attending the organisation

To

End Reason \*

Select an *End Reason*

Click on *Save*