Adults Quick Guide

Personal Relationships

Personal relationships are individuals personally involved with or connected to the person (subject) e.g. family members, friends and neighbours.

Any open, personal relationships recorded, will display in **Personal relationships** on the **Person summary** screen. The name of relations listed here act as hyperlinks to the relation's record. Any roles recorded will also display here e.g. Next of Kin

A Genogram (family tree diagram) can be generated by clicking the **Genogram** button located in this section. See the **Genogram** user guide for further details.

To view full details of all open and closed personal relationships, either click **Person details > Personal relationships** in the extended sidebar menu or click the **Change** button on **Personal relationships**

Note: The 'Change' button will only be visible if at least one personal relationship is already recorded.

The **Personal relationships** screen displays.

If no personal relationships have been recorded this screen will be blank.

If personal relationships have been recorded, you can access the relation's record by clicking their name or ID number within this screen.

Ended relationships will show with the end date of the relationship in the 'To date' column.

If necessary, you can re-organise the list of relationships by clicking on any of the column headings e.g. 'Relation name' to sort alphabetically by name or 'From date' to sort by date.

Adding a Personal Relationship

From the **Person summary** screen;

- Either click **Person details > Personal relationships** in the extended sidebar menu or click the **Change** button in **Personal relationships**.

Note: The 'Change' button will only be visible if at least one personal relationship is already recorded.

The **Personal relationships** screen displays.

- Click the **Add** button

The **Add personal relationships** popup window displays

- **Subject** = defaults in with the name of the person
- **Relationship** = Select from the dropdown menu

> The Relationship is listed as **'Subject: Relation'**

- **Relation** = Click the **Find** icon to perform a person search. See **Searching for A Person, Worker or Organisation** user guide for full guidance on performing a search.

> If the related person is not displayed (not known in Mosaic) and a minimum of 3 searches (using different search criteria) have been performed, click the **Add New** button to create a record for the related person. See **Creating a Person** user guide for further details.

From the search results click the **name** hyperlink to pull through the selected person to the 'Relation' field on the **Add personal relationships** window.

- **From date** = Defaults in, can be amended if required using the **date picker** icon

When recording a personal relationship, relevant **roles** for the person (subject) and relation should be added by selecting or deselecting checkboxes.

To do this:

- Click the **blue arrow** located to the left of the row.

The screen will expand with checkboxes relating to the person's (subject's) roles with regards to the relation and vice versa.

The **top checkboxes** are for the person’s (subject’s) roles with regards to the relation.

The **bottom checkboxes** are for the relation’s roles with regards to the person (subject).

> The role of 'Main/Principal Carer' is only for use by Children's Services.
>
> Adult Care practitioners should record an additional personal relationship of **Cared For: Carer** in the person's (cared for's) record to identify the carer.
>
> Carers Services should record the relationship of **Carer: Cared For** in the carer's record if this is not already visible.

- Click the **Save and close** button to close the **Add personal relationship** popup window

- Or click the **blue arrow** to close the checkboxes and then click **Add Another** button to add more relationships if required

- Click the **Save and close** button once all necessary relationships are recorded

The **Personal relationships** screen displays

- Click the **OK** button to return to the **Person summary** screen

Amending and Ending Personal Relationships including Roles

Personal relationships and roles should always be reviewed during case activity. They should be edited or ended as and when the information is received.

From the **Person summary** screen;

- Either click **Person details > Personal relationships** in the extended sidebar menu or click the **Change** button on **Personal relationships**

The **Personal relationships** screen displays.

- Click the **Edit Pencil** icon next to the relevant relationship

The **Amend personal relationship** popup window displays

- The 'Relationship type' and 'From date' fields = should only be amended if previously recorded incorrectly

- To date = **Only use if ending a personal relationship.** Use the **date picker** icon if ending the relationship

This screen also allows roles to be recorded or amended by selecting or deselecting the appropriate checkboxes (for both parties)

Remember :

The **top checkboxes** are for the person's (subject's) roles with regards to the relation.

The **bottom checkboxes** are for the relation's roles with regards to the person (subject).

> When personal relationship roles have changed these should be added or removed by selecting or deselecting checkboxes. An **AC Case Note** must be recorded with the title of **'Relationship Status Change'** to record the specific details of the changes for audit purposes.

- Click the **Save** button

The **Personal relationships** screen displays

- Click the **OK** button to return to the **Person summary** screen

Ended personal relationship details will not display on the Person **summary** screen. The details will become historic and will only be visible in the **Personal relationships** screen.

Appendix 1 – Person Posing a Risk

If you create a person and they have been identified as posing a risk, you must record a **Note** to highlight this on their record.

You must use a note category of **B: Warning** and include any relevant information in the Note text field. If available, this can include details obtained from sources such as the Police or Safeguarding teams. Warning notes should always be discussed with your manager first before recorded in Mosaic.

If you become aware of anyone known to be a PPRC (Person Posing a Risk to Children) then you should contact Children's Safeguarding Admin so they can record an appropriate warning.

Do not:

- Record a note advising the person poses a risk on any record but their own.
- Use any of the three note categories beginning **C: Person posing risk**. These are only to be used by the appropriate Children's Services teams.