


# Changing Family Relationships - Include v1.1.3

Each organization in a family has a hierarchical relationship to the other members of the family (as applicable). Refer to [Family Organization Relationships](#) for details. You can change any of these relationships as necessary.

 You also can make these changes in the organization record itself. See [Curating Organizations](#).

## How to Change Hierarchical and Functional Relationships

- 1. On the main menu, under **Organization Family**, click **List**.  
The Families page appears.

Families

Family List

Create New

Family ID	Family Name	Organization Family Members	Status	Action
13078818	Arizona Cancer Center	Premiere Oncology of Arizona (ORGANIZATIONAL)	ACTIVE	Edit
13078708	Example Family	Example Organization 2 (ORGANIZATIONAL)	ACTIVE	Edit
		Example Research Organization Role (AFFILIATION)		
		Example Organization (ORGANIZATIONAL)		
		Example Organization 1 (ORGANIZATIONAL)		
13078685	Example Organization Family	Example Health Care Facility (AFFILIATION)	ACTIVE	Edit
		Example Organization (ORGANIZATIONAL)		

- Families Page
- 2. Locate the appropriate family, and click **Edit**.  
The Family Details Page displays the list of organizations that currently belong to the family you selected.

Family Details
[Help](#)

**Family Information**

**Family ID:** 13078708   **Status:** ACTIVE  
**\* New Status:** ACTIVE   
**\* Start Date:** 02/10/2011   
**\* Family Name:** Example Family Name

Save   Return to Families

**Organization Family Members** Add

Organization ID	Organization Name	Functional Relationship	Effective Dates	Action
13066699	Example Organization	ORGANIZATIONAL	02-10-2011	Edit Remove
13078765	Example Organization 2	ORGANIZATIONAL	02-21-2011	Edit Remove
13066769	Example Research Organization Role	AFFILIATION	02-21-2011	Edit Remove
13078861	Example Organization 1	ORGANIZATIONAL	02-21-2011	Edit Remove

4 items found, displaying all items.

*Family Details Page*

- In the **Organization Family Members** list, locate the organization that you want to change, and click **Edit**. The Family Organization Relationship Page displays the organization's current functional relationship with the family, and the hierarchical relationship it has with other members of the family.

Family Organization Relationship
[Help](#)

**Family:** Example Family

**Family ID:** 13078708   **Family Name:** Example Family   **Status:** ACTIVE

**Organization Name:**  
Example Organization

**\* Functional Relationship:**  
ORGANIZATIONAL

**Effective Dates**

**\* Start Date:** 02/10/2011   **End Date:**

Save   Return to Family Information

**Hierarchical Relationship to other Organizations within this Family**

Organization Relationship to Example Organization	Start Date
Example Organization 1 has no relationship <a href="#">(change)</a>	
Example Organization 2 has no relationship <a href="#">(change)</a>	
Example Research Organization Role has no relationship <a href="#">(change)</a>	

- To change the functional relationship, from the **Functional Relationship** drop-down list, select the functional role that the organization plays in the family. See [Family and Organization Relationships](#) for valid values.
- To change the hierarchical relationships, in the **Hierarchical Relationship to other Organizations within this Family** table, locate the organization whose relationship to the current organization you want to change, and click **Change**.  
The Change Hierarchical Relationship window appears.

### Change Hierarchical Relationship

#### Old Relationship

**Start Date:** 02-21-2011 **End Date:** 02/21/2011

#### New Relationship

Example Organization 2 is a --Select a Relationship-- of Example Organization

**Start Date:** 02/21/2011

#### Change Hierarchical Relationship Window

- From the **Select a Relationship** drop-down list, select the relationship that the selected organization has with the current organization. For example, if Organization 1 is the parent of Organization 2, and you selected Organization 1, select **Child** from the **Select a Relationship** drop-down list, because Organization 2 is the child of Organization 1.
- Click **Add New Relationship**.

If a relationship had been established previously, the Change Hierarchical Relationship window displays the old and new relationships.

### Family Organization Relationship

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**Family:** Example Family

**Family ID:** 13078708 **Family Name:** Example Family **Status:** ACTIVE

**Organization Name:** Example Organization

**Functional Relationship:** ORGANIZATIONAL

**Effective Dates**

**Start Date:** 02/10/2011 **End Date:**

Hierarchical Relationship to other Organizations within this Family	
Organization Relationship to Example Organization	Start Date
Example Organization 1 is a CHILD ( <a href="#">change</a> ) ( <a href="#">remove</a> )	02-22-2011
Example Organization 2 has no relationship ( <a href="#">change</a> )	
Example Research Organization Role has no relationship ( <a href="#">change</a> )	

#### Change Hierarchical Relationship Window – Old and New Relationships

- In the **End Date** field, enter the date on which the former relationship ended (if appropriate) .



Adding an end date inactivates and hides the organization's relationship with this family.

- In the **Start Date** field, enter the date on which the new relationship started. The system default is the current date.

10. Click **Add New Relationship**.

The Family Organization Relationship window displays the new hierarchical relationship.

Family Details

Help

Family Information

Family ID: Status:  
13086495 ACTIVE

New Status:  
ACTIVE

Start Date:  
02/03/2011

Family Name:  
Example Family Name

Save

Return to Families

Organization Family Members

Add

Organization ID	Organization Name	Functional Relationship	Effective Dates	Action
13066699	Example Organization	ORGANIZATIONAL	02-21-2011	<div>Edit</div> <div>Remove</div>

One item found.

*Family Organization Relationship Window – New Hierarchical Relationship*

11. To remove an existing relationship, in the **Hierarchical Relationship to other Organizations within this Family** table, click **Remove**.
12. Click **Save**, and then click **Return to Families**.