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					@ <u>Help</u>
Family L	ist				💿 Create New
<u>Family ID</u>	<u>Family Name</u> ▽	Organization Family Members		Status	Action
13078818	Arizona Cancer Center	Premiere Oncology of Arizona	(ORGANIZATIONAL)	ACTIVE	Carl 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	2 Edit
		Example Organization	(ORGANIZATIONAL)		

Families Page

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

amily Detail	s			@ <u>Help</u>
amily Infor amily ID: Sta 3078708 AC	mation tus: TIVE			
lew Status: ₄CTIVE Start Date:	×			
02/10/2011 Family Name	:		_	
Example Fan	nily Name			
📑 Save 🛛 🕻	Return to Families			
Organizatio	n 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
<i>mily Details</i> the Organiz e Family Org ationship it h amily Organ	Page ation Family Members list, loc ganization Relationship Page di nas with other members of the fa nization Relationship	ate the organization t splays the organization amily.	that you want to on's current fur	o change, and click Edit nctional relationship with
Family: Exan	nple Family			
Family ID: Fam 13078708 Exa	nily Name: Status: mple Family ACTIVE			
Organization Na Example Or	ame: ganization			
Functional Rel ORGANIZATI	lationship: ONAL ❤			
Effective D	ates			
* Start Date: 02/10/2011	End Date:			
💾 Save 🤇 🄇	Return to Family Information			
Hierarchical	Relationship to other Organiz	ations within this Fa	amily	
Organization Re	lationship to Example Organization			Start Date
Example Organi	zation 1 has no relationship (change)			
Example Organi	zation 2 has no relationship (<u>change)</u>	in Advance A		
cample Resear	ch organization Role has no relationsi	np <u>(change)</u>		

Family Organization Relationship Page - Organization Removed from Family

- 4. 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.
- 5. 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				
rganization				

Change Hierarchical Relationship Window

6. 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.

7. 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	@ <u>Help</u>		
Family: Example Farmily			
Family ID: Family Name: Status: 13078708 Example Farmily ACTIVE			
Organization Name:			
Example Organization			
* Functional Relationship: ORGANIZATIONAL			
Effective Dates			
* Start Date: End Date: 02/10/2011 Image: Comparison of the second sec			
Save Return to Family Information			
Hierarchical Relationship to other Organizations within this Family			
Organization Relationship to Example Organization	Start Date		
Example Organization is a CHILD (change) (remove)	02-22-2011		
Example Organization 2 has no relationship (change)			
Example Research Organization Role has no relationship (<u>change)</u>			

Change Hierarchical Relationship Window – Old and New Relationships

8. 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.

9. 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.

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The Family Organization Relationship w	indow displays the new hierarchical relationship.
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Family Details	5			@ Help		
Family Information						
Family ID: Status: 13086495 ACTIVE * New Status:						
ACTIVE ACTIVE						
02/03/2011						
* Family Name:						
Example Family Name						
Save Return to Families						
Organization ID	Organization Name	Functional Relationship	Effective Dates	Action		
13066699	Example Organization	ORGANIZATIONAL	02-21-2011	Edit Remove		
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.