Relationships

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Tool Search: Relationships

The Relationships tool displays established relationships between people existing in Campus. Relationships include the other individuals residing in the same household as the selected individual and those individuals who may reside in other households but have an association with the selected person (emergency contacts, divorced parents, etc.).

Fields vary by state. Please see your state's [State Tools](#) articles for more information on Relationship procedures in your state.

This requires relationships to first be defined by an administrator on the [Relationship Type](#) tool. New household relationships are established through the [Census Wizard](#) and cannot be added through this tool.

Relationships

See the [Relationships Tool Rights](#) article for information about the rights needed to use this tool.

Relationship Fields

Clicking on the link of a listed person's name in the **Name** column will switch to his/her Relationships record. Changes made to any **Relationship** field will automatically update the other person to whom the relationship applies.

- The person selected in the Search Results and whose name displays at the top of the page is the type of relationship.
- The person for whom the relationship is being selected is the second relationship type.

Frank Parent Relationship Display

In the image above, Frank Parent is the father of Lucy Student, the stepfather of Ginger Student, and the guardian of Brian Student. When viewing Lucy's relationships (for example), Frank Parent is displayed as her Father, as shown in the image below.

Lucy Student Relationship Display

The following fields define the relationship.

Field	Description
Relationship	Designates the type of relationship between two people. Both people - the selected individual and the name of the person in the row - are affected by the selected. Relationship types are defined for the district in the Relationship Type tool.
Start Date	Date on which the relationship started. This date is not required to save a relationship. But, if a relationship is removed due to a clerical error, and the start date is not removed, a blank entry displays on the student's Summary record. If a relationship ends (emergency contact changes, etc.), an end date should be entered rather than removing the assigned relationship type. In the case where the relationship ends but the person should still display on the reports and summary information, create a Not Applicable or Undefined Relationship Type.
End Date	Date on which the relationship ceased to apply. An End Date does not delete a relationship, just ends it.
Emergency Priority	Provides a visual indication of the listed person's priority for contact in an emergency situation. This is a numeric value. The person that should be notified first should have a 1. If there is no entered priority, the school uses discretion when contacting individuals. Messaging tools do not use this tool when sending mass emails or voice messages.
Guardian	When checked, indicates which person has authority when making decisions on behalf of the student.
Mailing	When marked, indicates that person will receive addressed reports to his/her attention.
Portal	This checkbox should be marked if the listed person should have access to the Portal information of the person currently being viewed.
Messenger	This checkbox should be marked if the listed person is considered a messenger contact for the person currently being viewed. If marked, the listed person will receive phone, email, process inbox and/or Portal inbox notifications regarding the person currently being viewed. In order to receive messages, a person must have phone numbers and/or email addresses entered for them in Census > Demographics, along with contact preferences.

Field	Description
Private	Indicates the details should be kept within school settings. Marking this checkbox does not remove the information from reports. See the Private Checkbox Information article for more details.
Legal Designee	Indicates the contact has been assigned the legal authority to make decisions regarding the student's health, education, or welfare. For example, a student may be assigned a legal designee during a child custody case or when transitioning into the foster care system. The checkbox defaults to unmarked.

Create Relationships

The Relationships tool lists connections between the selected person and other people, either within a household or outside of a household. The district can list emergency contacts, grandparents, daycare providers, etc.

Modifying information for one member of the relationship also modifies the information for the other member of the relationship. For example, if a relationship to a new non-household guardian is added with a specific start date for a student, that selected guardian will be assigned a non-household relationship with the student using the same start date.

Household relationships should be added on the Households editor.

Establish Relationships in the Primary or Secondary Household

Before establishing relationships, verify the primary household is complete to the best of your knowledge.

The names of people who are currently members of the same household as the selected person appear as relationships in the Primary Household or Secondary Household. The following procedures are needed to complete the setup of relationships.

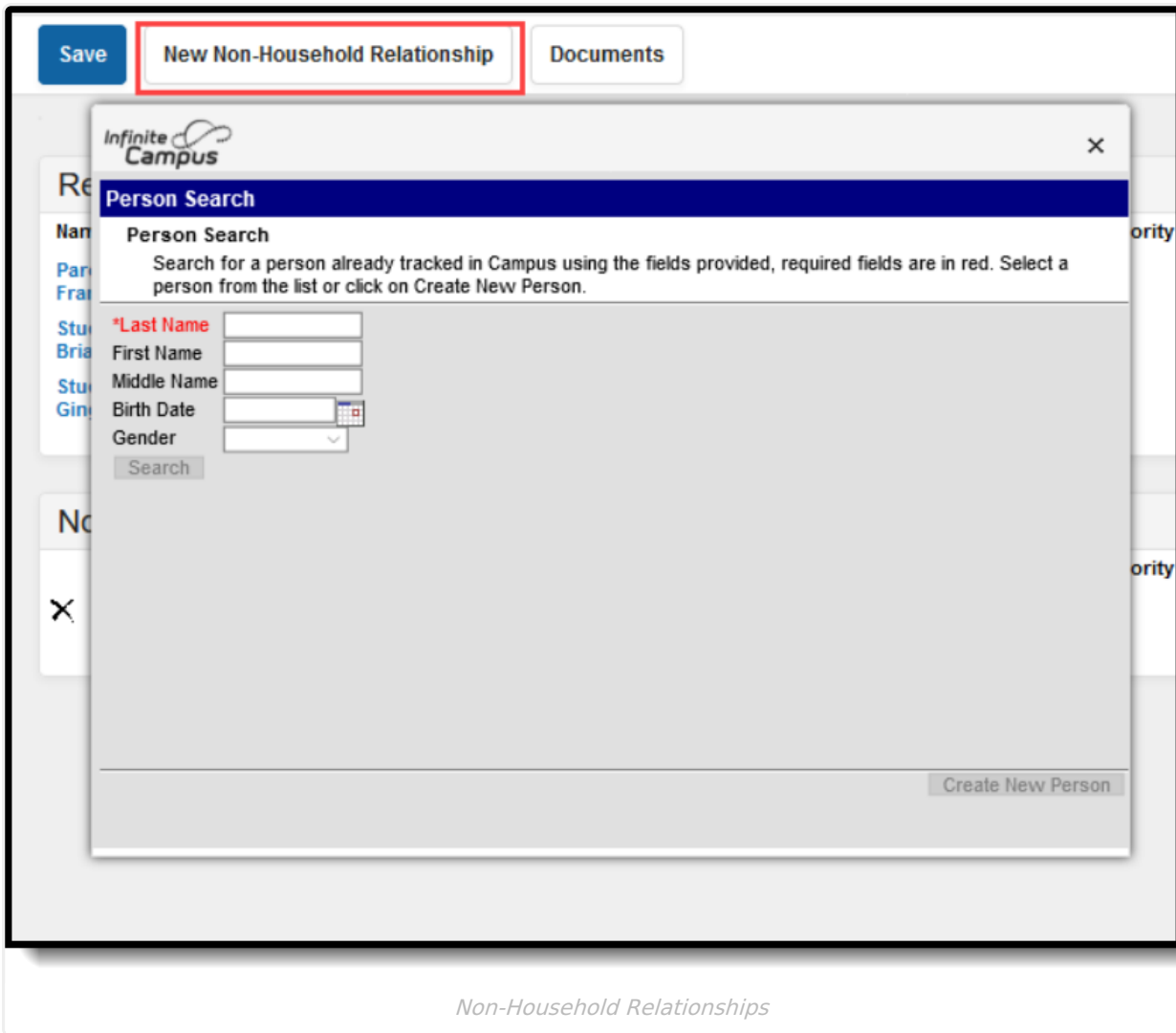1. Select the appropriate **Relationship** from the dropdown list.
2. Add any **Comments** about the relationship by clicking the note icon next to the dropdown field.
3. Enter a **Start Date** in *mmddyy* format or use the calendar icon to select a date.
4. Enter the **Emergency Priority** value.
5. Mark the checkboxes for the relationship as appropriate.
6. Click the **Save** icon when finished.

Add New Non-Household Relationships for Persons Currently in Census

A non-household relationship is defined as anyone with whom a person has a purposeful relationship but who does not live in the same dwelling space. Examples include extended family members, emergency contacts, neighbors, health care professionals, etc.

Emancipated Students require a non-household relationship to themselves.

1. Select the **New Non-Household Relationship** icon. A **Person Search** screen displays.
2. Enter at least the **Last Name** in the **Search Fields**. Enter additional search criteria as needed. Results display in the box to the right.
3. Locate the desired person and select their name from the search results or click the **Details** link to review their information. Selecting the Details link displays a Person Summary Report in a new PDF window.
4. Select as many individuals as necessary. Their names display in the **Non-Household Relationships** table.
5. Click the red **X** in the Person Search window.
6. Select the **Relationship** for the newly added non-household relationship.
7. Add any **Comments** about the relationship by clicking the note icon next to the dropdown field.
8. Enter a **Start Date** in *mmddyy* format or use the calendar icon to select a date.
9. Enter the **Emergency Priority** value.
10. Mark the checkboxes for the relationship as appropriate.
11. Click the **Save** icon when finished.

Non-Household Relationships

Add New Non-Household Relationships for Persons Not in Census

1. Select the **New Non-Household Relationship** icon. A **Person Search** screen displays.
2. Enter at least the **Last Name** in the **Search Fields**. Enter additional search criteria as needed. Results display in the box to the right.
3. If the desired person does not appear in the search results, or if no person matches were found, click the **Create New Person** button. A Person Creation form displays.
4. Enter at least the required information (Last Name, First Name, Gender and Race/Ethnicity).
5. Click the **Save** button. The new person will be created.
6. Select that new person from the Person Creation window. The name displays in the **Non-Household Relationships** table.
7. Click the red **X** in the Person Search window.
8. Select the **Relationship** for the newly added non-household relationship.
9. Add any **Comments** about the relationship by clicking the note icon next to the dropdown field.
10. Enter a **Start Date** in *mmddyy* format or use the calendar icon to select a date.
11. Enter the **Emergency Priority** value.
12. Mark the checkboxes for the relationship as appropriate.

13. Click the **Save** icon when finished.

Edit Relationships

When a relationship needs to be modified, meaning contact guidelines need to be modified, the relationship needs to be ended or the relationship type is wrong, make the necessary changes and save the information.

Deleting a relationship should only be done if the original instance of the record was completely incorrect.

Use the End Date fields to modify the date range of when the relationship was in effect. This goes for any contact guidelines as well. If a guardian relationship is no longer due to custody activities, end date the existing relationship where the guardian is considered the student's guardian and create a new record for the person (if needed) where he/she is not considered the guardian.

Manage Documents

To view documents, click the **Documents** button on the action bar. Users with the appropriate tool rights may also complete the following tasks.

- Upload Documents
- Delete Documents
- Replace Documents
- Edit a Document Name or File Description
- Download Documents