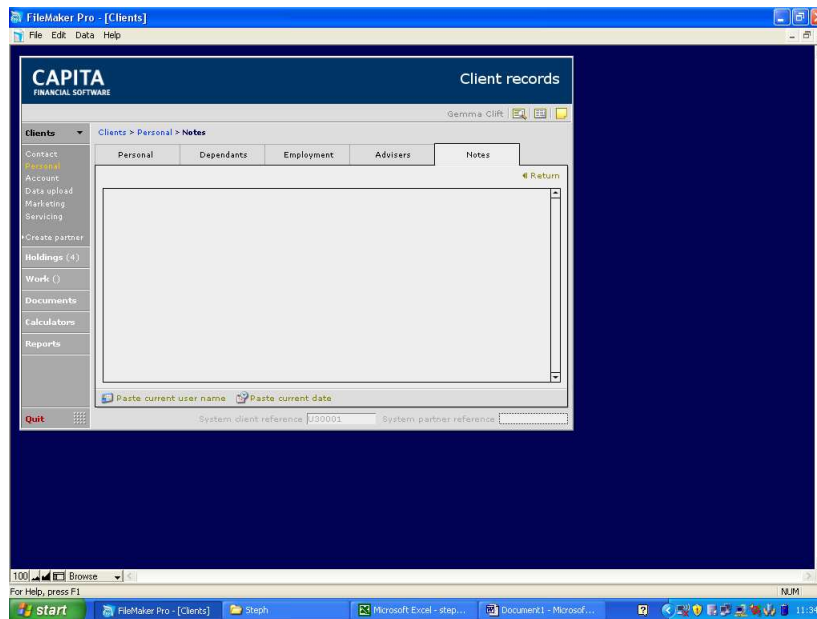


## How to Disassociate Client and Partner Records

If you wish to disassociate two clients on Client Care Desktop i.e.:- a Client and their respective Partner who are linked together (associated). Please follow the instructions below:-

From the manager screen, click on the Clients option and locate your lead Client record. Click on the Personal option and then choose the Notes tab.



Located at the bottom right of this screen is a box with the “System partner reference” in light grey.

Please click into this box and remove the reference, leaving it blank.

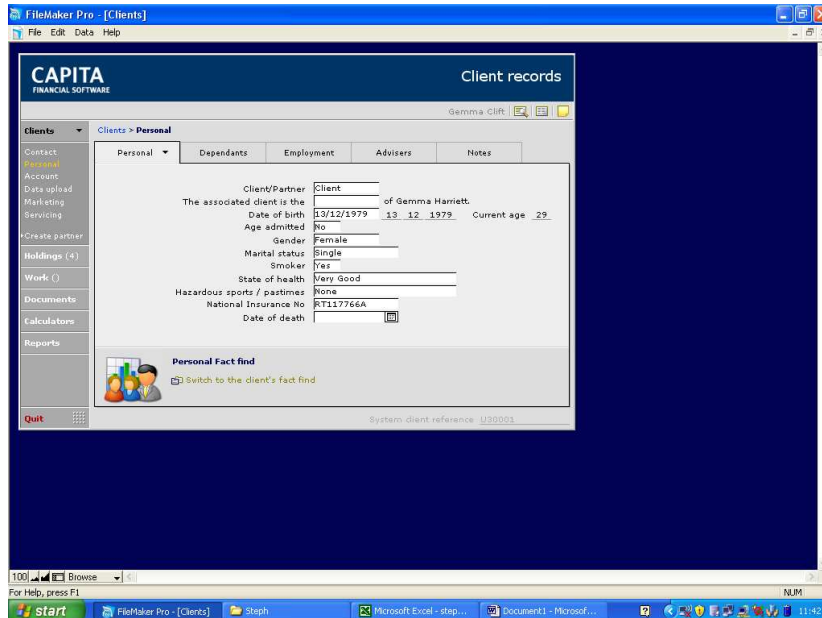
Now click on the Clients option on the left of the page, which allows you to switch to the Clients Partner record.

In here you will now need to do the same as above. You will now see that where the Clients Partner name showed previously, this has changed to “Create partner”.

If these clients also had a Factfind created together, then you will also need to remove the ‘System partner reference’ from there.

**N.B:- Before you separate this Factfind, please ensure that you have a PDF copy of the joint Factfind. Once you have removed the partner reference, you will no longer be able to view the joint Factfind on CCD.**

Locate the first client – Personal and click on the link at the bottom of the page  
“Switch to the client’s fact find”



Once the joint fact find as opened click on Personal on the left and again you will see the “partner reference” box. Please remove this reference, this will now allow you to create a new fact find for the client in single name.

As like above, you will now need to go into the partner record and do the same again.