

Assigning Child Custody to Guardians

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

Sometimes, a grandparent, relative, or other person will take care of a child instead of a parent. In these scenarios, it is important to set up permissions correctly within Axiom to avoid potentially uncomfortable situations in the future. Below are the steps you should take to ensure that all communications and permissions typically designated to parents are enabled for the guardian, while also maintaining and noting the actual relationship between the guardian and child.

Workflows

This workflow applies to cases in which the guardian **does not** yet have a user account:

1. Navigate to the Related People tab on the child's person record
2. Ensure that the relationship between the child and the guardian is their actual relationship
3. Assign the Guardian a person role of "Parent"
4. Check off the appropriate permissions for the guardian in the data grid and click Update. At least the "Legal Custody" and "Parent Portal Access" options should be checked
5. Create a User Account using the "Create VC User Account" from the Action menu on the Guardian's person record
6. Ensure that the Guardian has a "Parent" security role by clicking into their Other tab on their person record

In cases in which the Guardian **does** have an existing user account and **does not** have a Parent security role, navigate to the Guardian's person detail screen and run the "Remove VC User Account" from the Action menu. After this has been completed, perform the steps outlined above.
