

I-SMART - Clients with Consents from Outside Agencies List

Managing Clients with Consents from Outside Agencies list in I-SMART:

- Filter the list on the Client Search screen to only show clients on this list who have an active consented activity
- Ability to remove clients from this list when they do not show for services
- Ability to link Consented Activities from this list to client records within your own agency, thereby removing those activities from the list and adding them to a location within the Client Profile.

1. The **filtering functionality** will be visible to all users who access the Client Search screen. The field is labeled “Include Only Active Consents” and it defaults to “Yes”. This means that a client will only show up on the Clients with Consents from Outside Agencies list if they have an unexpired consented activity. The user can change this to “No” if they’d like to see expired consents as well.

Client Search

Agency <input type="text" value="State of Alaska"/>	Facility <input type="text"/>
First Name <input type="text"/>	Last Name <input type="text"/>
SSN <input type="text"/>	DOB <input type="text"/>
Client ID <input type="text"/>	Provider Client ID <input type="text"/>
Treatment Staff <input type="text"/>	Primary Care Staff <input type="text"/>
Case Status <input type="text" value="All Clients"/>	Intake Staff <input type="text"/>
Other Number <input type="text"/>	Number Type <input type="text"/>

Include Only Active Consents

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
M119577Z1777100	1'last, 1'test	1/1/1975	777-77-7777	Female	Profile Activity List
M119577Z1737100	1234, 1234	1/1/1975	111-33-3777	Male	Profile Activity List
M19981491228110	19, January	1/19/1988	145-21-2124	Male	Profile Activity List
M11912112117120	21, 21	1/21/1971	212-12-1211	Male	Profile Activity List
F119645Z3697100	3, 1	1/1/1995	123-45-9465	Male	Profile Activity List
M11959745867100	5464, enhancement	1/1/1975	321-45-6987	Male	Profile Activity List
M81900995098100	5935, test	8/1/1980	342-18-9009	Male	Profile Activity List
M11951166137100	6639, Enhancement	1/1/1975	222-33-2222	Male	Profile Activity List

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Patrick's Test Agency	M119200LA005100	Alaska, Access	1/1/1952	000-00-0000	Male	Activity List Remove
Patrick's Test Agency	M119899EB999100	Bear, Baby	1/1/1998	999-99-9999	Male	Activity List Remove

2. The **ability to remove clients from this list** will only be available to users with the Clinical Supervisor role. A new Actions link called “Remove” now appears on the list for users with the correct permissions.

Clients with Consents from Outside Agencies						
Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Patrick's Test Agency	M119200LA005100	Alaska, Access	1/1/1952	000-00-0000	Male	Activity List Remove
Patrick's Test Agency	M119899EB999100	Bear, Baby	1/1/1998	999-99-9999	Male	Activity List Remove

Selecting "Remove" literally removes them from the list.

Clients with Consents from Outside Agencies						
Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Patrick's Test Agency	M119899EB999100	Bear, Baby	1/1/1998	999-99-9999	Male	Activity List Remove

If you realize after removing them that they actually should be on the list, you can put them back. Under the Agency menu is a new screen called "Removed Consents" where you can find any record that was removed from the Client Search screen. This screen also is only visible to users with the Clinical Supervisor role. Selecting "Restore" will return the client to the Clients with Consents from Outside Agencies.

- Home Page
- Emergency Services
- Agency ▾
- Agency List ▾
- Agency Profile ▶
- Aliases
- Contacts
- Governance ▶
- Relationships ▶
- Announcements
- Referrals ▶
- Removed Consents**
- Wait List
- Facility List ▶
- Staff List ▶

Removed Consented Client Search

Consented From Agency Client ID

First Name Last Name

Removed Consented Client List

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Patrick's Test Agency	M119200LA005100	Alaska, Access	1/1/1952	000-00-0000	Male	Restore

Additionally, if another consent record is created to your agency for the same client, the client will be automatically returned to the Clients with Consents from Outside Agencies.

The ability to **link consented client activities to the client record** to which they belong is expected to be implemented in the March 2011 release.