

## Global Client Search and Import

To better assist users in viewing and using Global Client Data in the system, we wanted to provide some clarification on how global clients can be located and used to your organizations benefit using the our standard search and import tools. The Global Client Import has also been slightly updated in terms of how the authorization portion of the process works in an attempt to make the process easier to understand and use. The following guide will detail how to locate and import global clients into your organization using this new method; details on what changed to the process is listed at the end of this guide.

When performing a client search, through the Find/Add Client function, the system returns a list of clients based on the criteria entered. These client records are either fully accessible by you and your organization or are globally shared client records from other partner organizations and are only accessible in a “read-only” fashion.

First Name ▲	Middle Name ▲	Last Name ▲	Owned By Your Organization ▼
Bill		Johnson	Yes
Billy		Johnson	Yes
BRIAN	EDWAQRD	JOHNSON	No (Global Client)
Brandy		Johnson	No (Global Client)

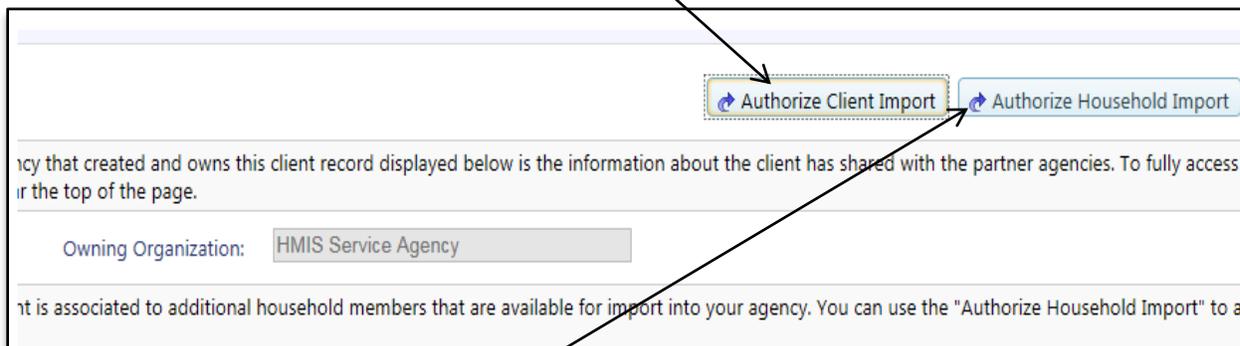
Each client record returned in the Find/Add Client Search it labeled with its current accessibility status within the “**Owned By Your Organization**” column; Yes indicates a fully accessible local record and a No indicates only a partially accessible global record.

For those Global Clients, you can select them and view their Global Client Profile, which provides shared information about the client collected at outside partner organizations. However, no direct collection can be performed on global clients.

The screenshot shows the ClientTrack interface for a client named Billy Johnson. The 'Edit Client Profile' feature is highlighted, and a callout box explains that while the profile can be viewed, other data functions are not accessible for global clients. The interface also shows 'Globally Shared Information' and 'Client Demographics' sections.

To allow for increased client data sharing between partner organizations, to reduce data collection burdens on both organizations and the clients they serve, and to decrease the overall number of duplicate clients entered, the system allows for a process to “Import” a global client into your own organization. This import would allow your organization full access to this client and in turn allow for this client record to be fully accessible for standard data collection. Once a client is “imported” into your organization, from that point forward, you would see that client record as a part of your organization.

To import a client, simply use the “**Authorize Client Import**” located on the top right hand corner of the Global Client Profile screen. This option will walk you through the process of recording and completing the import of a client record into your organization.



The system also allows for the importing to occur on an entire household as well. When viewing a Global Client Profile, if the system notices that the current client is associated with other household members and those other household members are globally shared clients, you will also be presented with an “**Authorize Household Import**” option that will allow you to import the entire household into your organization using a single process. This option, much like the Client Import will walk you through the process of recording and completing the import of all of the household’s client records into your organization.

Once a client or household import is completed you be placed back on the Client Dashboard of the original client and all of the standard data collection functions will be unlocked for use. Also any subsequent Find/Add Client Search will show this client and any other imported client as being a part of your organization for future data collection and reporting needs.

#### **Global Client Import Methodology Change:**

Those familiar with the previous Global Client Import process may have noticed that it is **no longer required to acquire either written or verbal authorization** from the client or household to use their global HMIS client record prior to performing the import process. This authorization step is no longer required and any global client that you locate within the Find/Add Client search can be automatically imported for immediate use in your organization within the PA HMIS system using the steps listed above.

The reason this import authorization is no longer required is the system has moved to using each client's official **Client Consent Form for Release of Information** to provide this authorization. With this change the only clients that are available within the Global Search are those that have fully shared their entire client profile, which includes the sharing of all client profile based elements, any client that is only partially sharing their client record information will no longer be broadcast and available as a global client. And by using only fully shared clients, we can use their written authorization through the Client Consent Form to not only display their client information, but also use it to allow for their client record to be imported and used.

*Please note that the Client Consent Form for ROI only refers to data shared outside of the collecting organization. Regardless of the client's data sharing agreement, the collecting organization will always have full access to the data they directly enter into the system.*

The reason for this change was to simplify the overall process and use the authorization already provided by the client which we believe will increase the overall usage of these Global Client Profiles through both the search and especially the client/household import functions. And while change this will slightly decrease the overall number of global clients that are available (affects less than .008% of client records); it will provide for a much easier path for their overall usage.