Linked Consents
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This Tip Sheet focuses on how to manually link previously consented records in SMART.

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Rationale: Agencies that share data using the consent feature in SMART often find that the Client IDs in different agencies do not match. Therefore, on the Client Progress Report and Client Summary Report, the two clients’ records do not link. This new feature allows the user to manually link clients with different client IDs in order for the records to link on the two progress reports.

Entry Steps: Client Search, Client Activity List, Linked Consents.

1. First, search for the client that you wish to link to a consented record in another agency.

2. Once you have found the correct client, click Link Consents on the left hand menu tree.

3. To initiate a linked client consent, click Add Link.

4. Now, using the consent search screen, locate the correct client in the outside agency whose consented record you wish to link to. For example, choose “Flintstone” as last name to find all clients with a consent from any agency with last name of Flintstone.

5. Click Go. All clients with consents who meet the search parameters, and who are not already linked to a client in this agency, will be displayed.
Linked Consents (cont.)

6. The user reviews the list of clients who meet the search criteria and determines if the client who needs to be linked is in the list.

7. If the appropriate client is listed, the user clicks **Link** to link the client with the currently selected client in the current agency.

8. Therefore, to link Wilma Flintstone to the currently selected client, click **Link**.

9. SMART then asks if you are certain you wish to link the active client to the selected client. To continue, click **Yes**.
Linked Consents (cont.)

10. After you have linked the consents, the client you have linked to in the other agency will appear on the **Linked Consent List**. If you wish to unlink the clients, click **unlink** and the clients will no longer be linked.

11. When one runs either the Client Progress Report or the Client Progress Summary, all consented data from the Client with the Linked Consent will appear on the report.

**Additional Information:**

- If a client was referred to an agency and the referral was accepted, a linked consent already is in place. This linked consent cannot be unlinked, as it was created by accepting the referral. In the example shown, Janet Flowers was referred from First Bridge and accepted by Richfield.

- A client may have more than one linked consent in place. In that case, the consented data from ALL clients with linked consents will display on the Client Progress Report and Client Progress Summary. In the example to the right, both Janet Flowers and April Showers data from First Bridge will appear on the Client Reports for Janet Flowers in Richfield Drug Court.