

SMART Tip Sheets Linked Consents

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

Total Pages: 4

IGSR Technical Support: 301.405.4870

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Linked Consents

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.

To link this client's record with a consented record from another agency, choose "add link."

The screenshot shows the SMART QA IGSR interface. The top navigation bar includes the user name 'Bhoompally, Anu', location 'Middle Earth Treatment Clinic, Gandalf Lane', and client information 'Finch, Jeremy | M1103555555FI | Case #: 1'. The main content area displays a table titled 'Linked Consent List' with columns for Agency, Client Name, Client ID, DOB, SSN, and Actions. The first row shows 'Drug Court Agency (Training Only)' for 'Finch, Jeremy' with Client ID 'M1103555555FI', DOB '11/3/1955 12:00 AM', and SSN '123-77-5555'. An 'Add Link' button is circled in red in the top right corner of the table area.

The screenshot shows the SMART QA IGSR interface with the 'Consent Search' screen. The search parameters are: Consenting Agency (dropdown), First Name, Last Name, Client ID, and SSN. The search results table is titled 'Client List (Export)' and has columns for Agency, Client Name, Client ID, DOB, SSN, and Actions. The table lists several clients, including 'McTesting, Author' from 'MD Dept of Juvn Services (MD-400100)' with Client ID 'M1201880987MC', DOB '12/1/1988', and SSN '444-32-0987'. A red arrow points to this entry.

Clients who meet the parameters of the Consent Search (above), and are not already linked to a client in this agency, will display.

Linked Consents (cont.)

- 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.
- If the appropriate client is listed, the user clicks **Link** to link the client with the currently selected client in the current agency.
- Therefore, to link Wilma Flintstone to the currently selected client, click **Link**.
- SMART then asks if you are certain you wish to link the active client to the selected client. To continue, click **Yes**.

SMART QA IGSR - Internet Explorer provided by Dell
https://projects.igr.umd.edu/SmartMergeTest/System.aspx

User: Bhoornally, Ana
Loc: Middle Earth Treatment Clinic, Gandalf Lane
Client: Finch, Jeremy | M110355555F1 | Case #: 1

October 2010

Diagnosics Print View Logout

Home Page
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Drug Testing Check In
Client List
Client Profile
MCASP Risk Assessment
Linked Consents
Non-Episode Contact
Activity List
Episode List
System Administration
My Settings
Reports
Support Ticket

Consent Search

Consenting Agency: Z Peace World
First Name: _____
Last Name: _____
Client ID: _____
DOB: _____
SSN: _____

Clear Cancel Go

Client List (Export)

Agency	Client Name	Client ID	DOB	SSN	Actions
Z Peace World	Finch, Jeremy	M1222345544F1	12/22/1934	111-44-5544	Link
Middle Earth Treatment Clinic	Boop, Betty	F1203454444B0	12/3/1945	111-22-4444	Link
Woofin Poof	Hill, Bonnie	F0425681235HI	4/25/1968	288-41-1235	Link
Administrative Agency (MD-100100)	Young, Vince	M0823829999Y0	8/23/1982	458-99-9999	Link
MD Dept of Juvn Services (MD-400100)	McTesting, Author	M1201880887MC	12/1/1988	444-32-0887	Link

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User: Bhoornally, Ana
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Are you sure you want to link current client Finch, Jeremy to consented client Boop, Betty's consent?

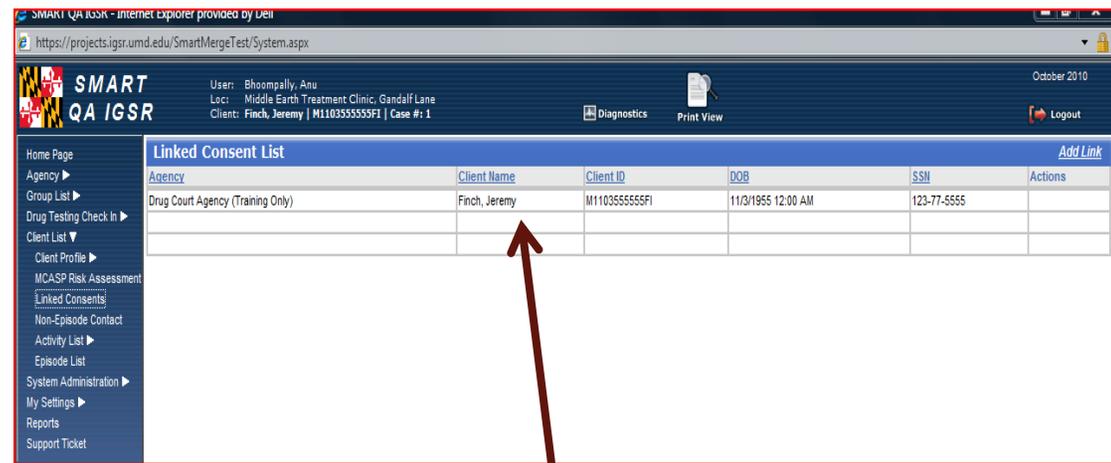
Yes No

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:

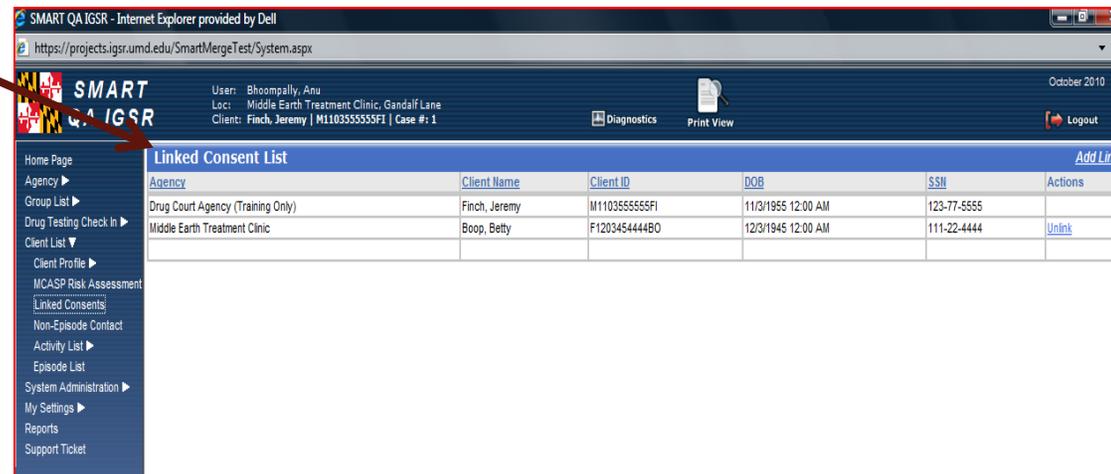
- If a client was referred to an agency and the referral was accepted, a linked consent already is in place. This linked consent cannot be unlinked, as it was created by accepting the referral. In the example shown, Janet Flowers was referred from First Bridge and accepted by Richfield.
- A client may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



The screenshot shows the SMART QA IGSR interface. The top navigation bar includes the SMART QA IGSR logo, user information (User: Bhoompally, Anu; Loc: Middle Earth Treatment Clinic, Gandalf Lane; Client: Finch, Jeremy | M110355555F1 | Case #: 1), and the date (October 2010). The main content area displays the 'Linked Consent List' table. A red arrow points to the first row of the table.

Agency	Client Name	Client ID	DOB	SSN	Actions
Drug Court Agency (Training Only)	Finch, Jeremy	M110355555F1	11/3/1955 12:00 AM	123-77-5555	

The agency name, client name, Client ID, DOB, and SSN of the client you are linking to will appear in the Linked Consent List.



The screenshot shows the SMART QA IGSR interface with two rows in the 'Linked Consent List' table. A red arrow points to the second row.

Agency	Client Name	Client ID	DOB	SSN	Actions
Drug Court Agency (Training Only)	Finch, Jeremy	M110355555F1	11/3/1955 12:00 AM	123-77-5555	
Middle Earth Treatment Clinic	Boop, Betty	F1203454444B0	12/3/1945 12:00 AM	111-22-4444	Unlink