Statewide search Quick Reference Guide

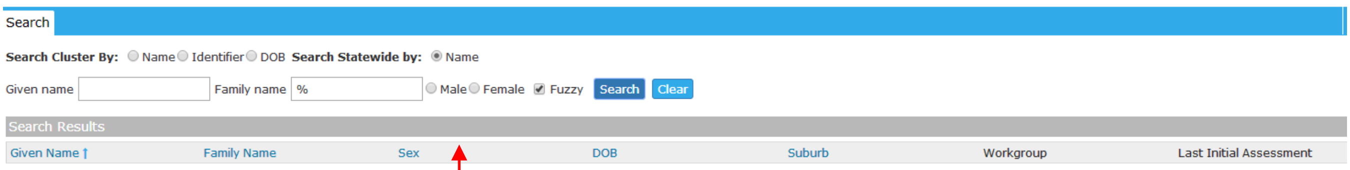
Definition
The Statewide search enables SHS practitioners to search for client files where the client has previously been to an SHS and agreed to their personal information being shared.

Context
The Statewide search allows services to access a client's information provided consent to share (see Consent to share quick reference guide) has been granted by the client. Having found the client file within the search results, the practitioner can access specific information (demographics, relationships, initial assessment, address and contacts in the client file (consent is provided in writing via tick box 'c' on the paper version of the client consent form).

This quick reference guide covers the following steps for using the Statewide search functionality in CIMS.

1. Run a Statewide search
2. Enter Consent to access Client's file
3. View Client information from the results of a Statewide search
4. Copy a Client's details into your workgroup

1. Run a Statewide search



1. Run a Statewide search

- A state-wide search is run from the Search Tab on the Persons page.
- Select the **Search Statewide by:** Name button.
- Enter search criteria in the Given Name and Family Name fields.
- Click the Search button.
- The search results will return a list of potential clients containing the following information Given Name, Family Name, Sex, DOB and Suburb from the client file demographics and address, and Workgroup and date of the client's Last Initial Assessment.

2. Select Client to view their information

Select the correct client from the search results to view their demographic, relationships, initial assessment, and address and contact information.

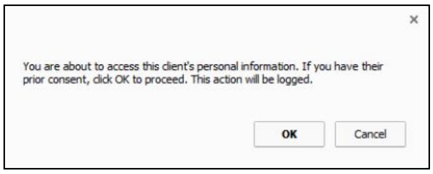
- Click on a highlighted person from the state-wide search results.

2. Enter consent to Access Client's file

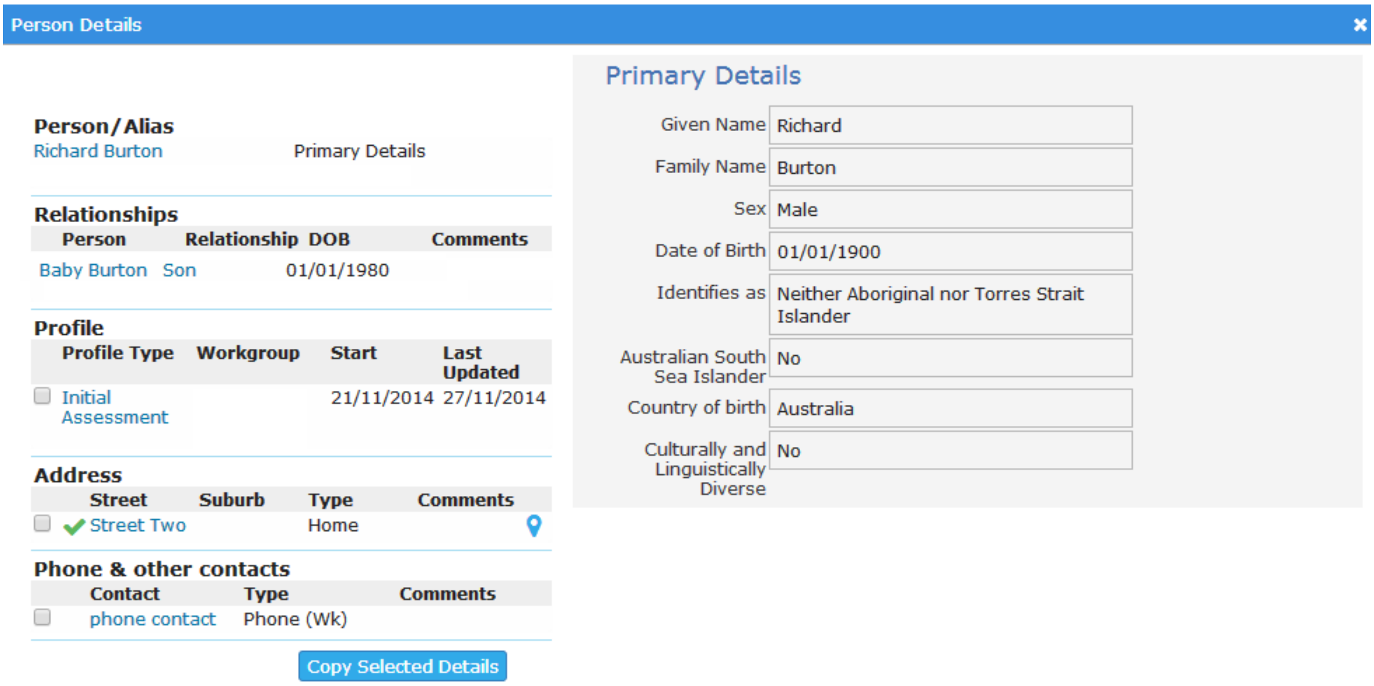
1. Consent to access the client file

A client's consent must be obtained in writing prior to accessing their personal information, see tick box 'B' on the client consent form (paper version)

- Click OK to confirm you have prior consent to be able to view a client's information.



3. View Client information from the results of a Statewide search



1. View Client information

The client information is displayed on the pane above. The left hand column lists highlighted information which when selected provides more information in the right hand column. Selecting highlighted text will display further information about the: Person, Relationships, Initial Assessment, Address or Contact information.

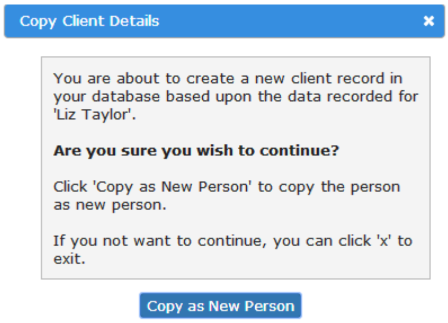
- Clicking the highlighted person Richard Burton will display their Primary Details.
- Clicking persons within the relationship section will display their Primary Details.
- Clicking the highlighted text Initial Assessment brings up a message box for the user to confirm they have obtained consent to view a previous initial assessment of the Client's
- Click OK to be able to display a Clients Initial Assessment.
- Clicking the highlighted address Street Two will display address details
- Clicking the highlighted phone phone contact will display contact details

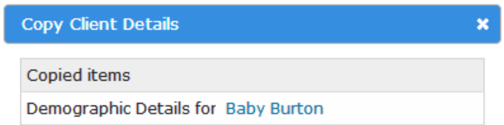
4. Copy a Client‘s details into your workgroup

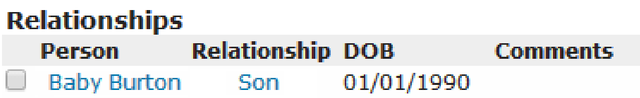
1. Copy an accompanying person’s client record

Before copying the client (adult) record you will first need to copy the client record of each accompanying person (children).

- Clicking the highlighted accompanying person (child) will provide more information about them.
- Clicking the Copy Selected Details button brings a warning box asking for confirmation you wish to copy client details.
- Clicking the Copy as New Person button copies the accompanying person client information into your workgroup and displays a detailed message of what was copied.
- Clicking on the client (adult) in the Relationships section will return you to their primary details
- A check box ☐ appears next to any accompanying person (child) in the relationships section who has been copied across.
- This process needs to be repeated for each accompanying person (child) included in the Initial Assessment.







2. Copy the client record

After copying the Client across, it is now possible to select the information you wish to be included when copying the client records.

- In each section select all the check boxes ☐ alongside the information in each section you wish to include in the copy. The presenting unit head is included in the copy by default.
- Clicking the Copy Selected Details button will initiate the copy.
- Clicking the Copy as New Person button copies the client record and selected information.
- When the client already exists the client has the option to Copy to Existing Person or Copy as New Person
- When a copy has already taken place a warning message is displayed.
- Once the copying process is completed a detailed message of the copied information will be displayed.