Global Client Search and Import

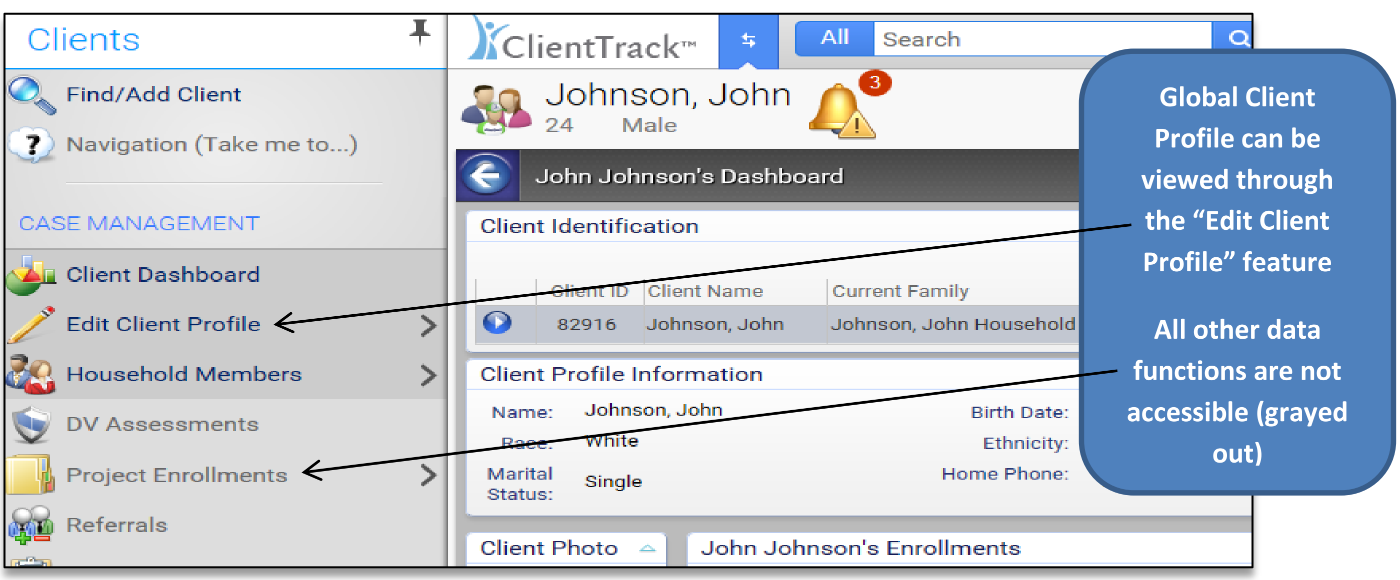
To better assist users in viewing and using Global Client Data in the system, we wanted to provide some clarification on how global clients can be located and used to your organization's benefit using the our standard search and import tools.   The following guide will detail how to locate and import global clients into your organization using the system's **import** functionality.

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 an initial "read-only" fashion.

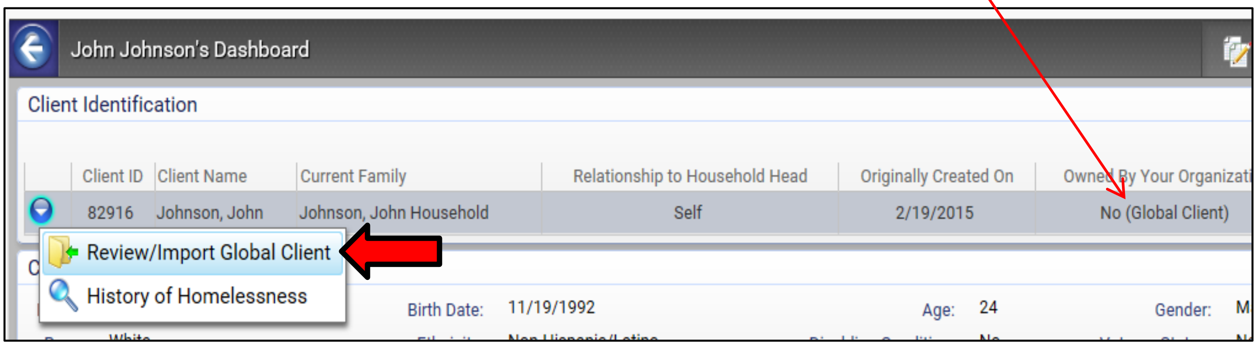
First Name	Middle Name	Last Name	Owned By Your Organization
Bill		Johnson	Yes
Billy		Johnson	Yes
BRIAN	EDWAQRD	JOHNSON	No (Global Client)
Brandy		Johnson	No (Global Client)

*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.



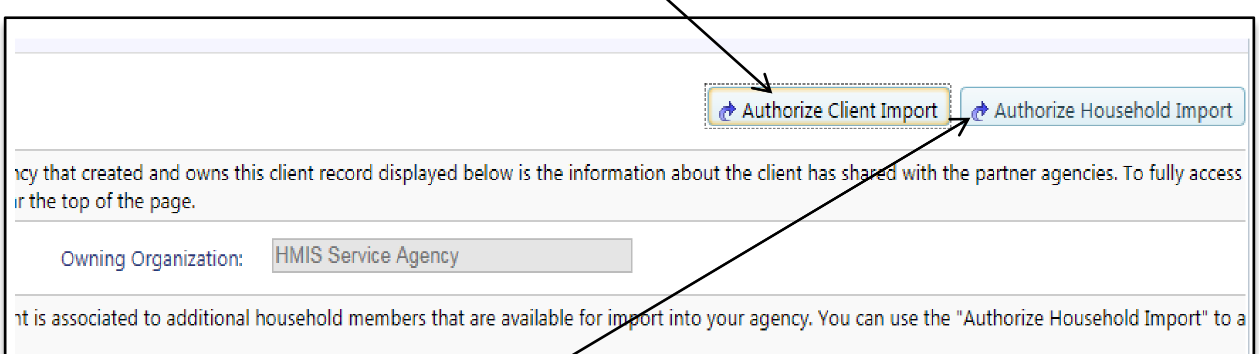
Once a global client is loaded, a Client Identification section will be visible at the top of the Client's Dashboard and will help indicate whether a client is <u>local (owned by your organization) or global</u> and requires an import to allow further data collection to occur.



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.

You can either load the **Edit Client Profile** option within the left-hand menu or use the above shown **Review/Import Global Client** to begin the import process in the system. Once the import is started you will be placed on a global client screen to help verify the client's identity along with 1 or 2 import options.

To import a client, 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.