



Module 4

Creating a new client record

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Preventing duplicates

Before you create a new record on the By Name List, it is important to check that the record doesn't already exist. You can search for a record using the search bar.

The system will show an error message if you try adding a new client with the same name and date of birth.

Sometimes, duplicates are unavoidable. For example, a person might only share their real name or birthdate a few weeks later. If you identify a duplicate record, please let the ESSC team know so we can merge the duplicates together.

The ESSC team also runs regular checks of the BNL to identify potential duplicates.

Duplicate records found

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

<input checked="" type="checkbox"/>	Full Name	Email	First Name	Last Name	Business Phone
	Cookie Monster		Cookie	Monster	

Duplicates found: Client (1)

<input checked="" type="checkbox"/>	Full Name	First Name	Last Name	Last Update
	Cookie Monster	Cookie	Monster	15/02/2024

[Ignore and save](#) [Merge](#) [Cancel](#)

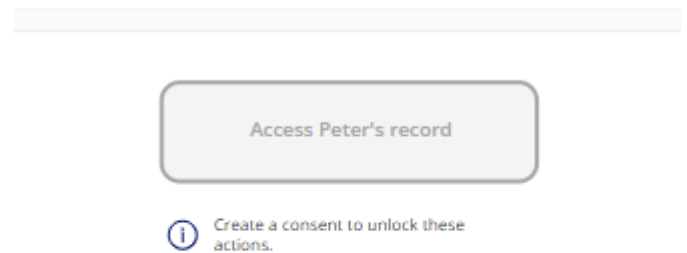
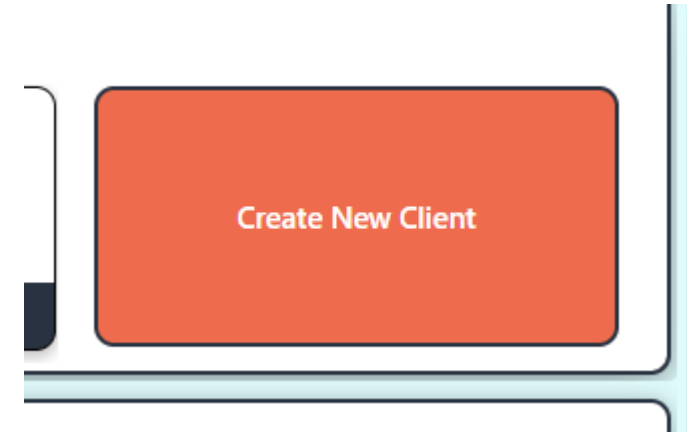
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Creating a new client record

You can create a new client record by clicking the *Create new client* button, either on the homepage or left-hand navigation menu.

There are two mandatory (and two optional) fields required to open a new record; a first name and date of birth. **Note:** the record cannot be saved unless the person's age is older than 16.

You will notice that once the client record is created, the access button is displayed in grey. You must have a valid consent in place to open the record!



The record will unlock when a consent is completed.

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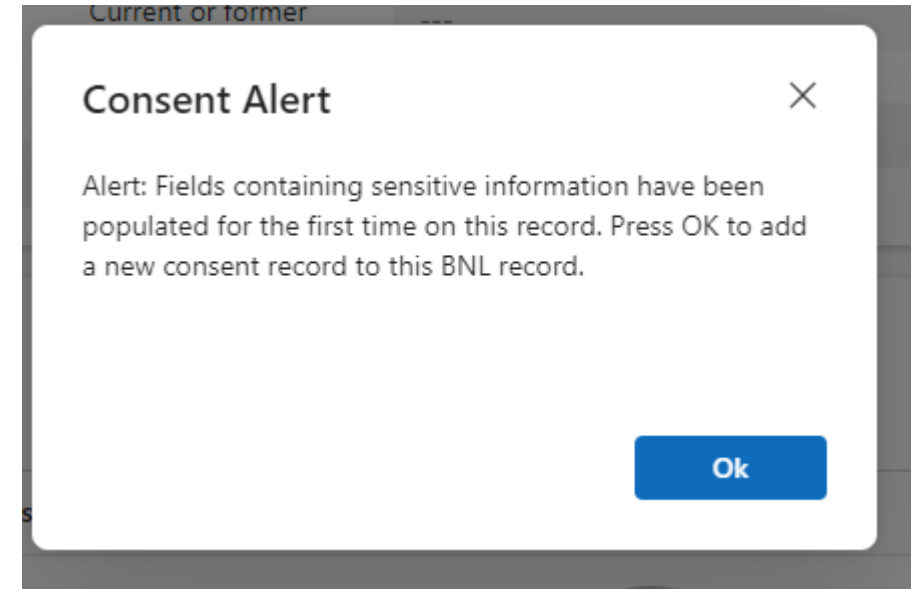
Consent on the By Name List

Clients must consent to having their information on the By Name List.

The consent process gives the option for people to restrict certain organisations from viewing their record. You can see if there is a restriction in place under the Service Provider Restrictions tab.

There are two types of information stored on the By Name List; personal and sensitive. When you update a field marked sensitive for the first time, the system will trigger an additional consent notice. You must gain consent to collect this information.

For non-health workers, the only sensitive information in the By Name List is a person's First Nations Identity, found in the support tab.



A consent alert when sensitive information is added to the By Name List for the first time.

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Completing a new consent

1. Navigate to the consent tab and press the + New Consent Button
2. *The consent form and collection notice* will appear, read this through with the client.
3. Select the district you are currently located in.
4. If the person consents, check the box marked 'I consent'.
5. A second box will then appear asking if the person wishes to restrict consent to an organisation. Check this box only if the person would like to do so.
6. Press the save button at the top of the element. A confirmation notice will then appear.
7. **If the person wishes to restrict consent**, a list of organisations will then appear. Select restrict next to the applicable organisation.
8. Press save & complete to complete the process with applied restrictions.
9. The completed consent will appear in the consent tab.

The screenshot shows a user interface for managing a client's consent. At the top, the client's name 'Benji Marshalling' is displayed with a 'Saved' status. Below this, a summary bar includes fields for 'First Name' (Benji), 'Last Name' (Marshalling), 'Created By' (Peter Valpiani), and 'Date of Birth' (3/02/1977). A 'Consents' tab is highlighted, and a '+ New Consent' button is visible in the top right corner. Below the summary bar, there are dropdown menus for 'Consent Nu...', 'First Na...', 'Last ...', and 'Date of Consent'. A large grey grid icon is centered on the page, with the text 'We didn't find anything to show here' below it. At the bottom left, it says 'Rows: 0'.

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Completing a VI-SPDAT Survey (optional)

Some communities prefer to use the VI-SPDAT survey when working with a person for the first time. It can be a good tool to identify a person's vulnerability. Information from the survey will populate the Survey Element (discussed in the next section).

To complete a survey, open the newly created consent, and press the button *Start VI-SPDAT*. Complete the survey as normal.

Note: Surveys should only be completed by people who are trained. VI-SPDAT training is no longer part of core training.

Read-only This record's status: Inactive

← | ↗ | + Start Survey | + Request Survey | ⚙ Start VI-SPDAT ▾

CN-00002016 - Saved
Consent

General | Related ▾

Consent Type *

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Exercise

You've started supporting a person and they aren't on the By Name List yet. Create a new client record then complete a consent to unlock it.

Exercise: Create a new client record with a consent. You will populate this record in the next section.





Thank you

We're here if you need us!
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