

# Client Record Visibility Quick Reference Guide

## Client Record Visibility (controlling access to client records)

### What is it

Visibility is a setting that can be applied to individual client records and is used to control access to that specific record. The 'May be viewed by' control, which appears on almost all client forms, is used to view and update the visibility of records.

### What does it do

The visibility setting for each client record determines whether the record can be viewed only within the **Workgroup** which created the record, within the **Cluster** in which the record is stored or, in some cases, **State** (i.e. the contents of the record will be visible in a Statewide search).

The client's name, demographic data<sup>1</sup>, alias(es) and relationships are always visible within the cluster that contains the client record, and this cannot be changed directly. However, if a current Consent to Share exists for the client and the client file is not marked Sensitive, then these items become visible in a Statewide search.

The client's addresses, eContacts and Initial Assessments can each be set to **Workgroup**, **Cluster** or **State** visibility.

All other records can only be set to **Workgroup** or **Cluster** visibility.

Making selected client records visible at the **State** level supports the no wrong door approach to client service delivery and is the default setting for clients who are not marked Sensitive. However, consideration should be given to whether all the record types are appropriate for sharing in each particular case (e.g. whether a DFV client's address should be shared). If not, the visibility of that record should be changed to **Workgroup** or **Cluster** as appropriate.

The use of **Cluster** visibility should also be reviewed before selecting this option. When multiple workgroups share a cluster, selecting **Cluster** visibility for selected records can save significant duplication of effort and simplify shared case management activities for a client. However, it is important to be aware of what other services and providers share the cluster before deciding to make records visible at the **Cluster** level. Check with your coordinator or with [cims@facsnsw.gov.au](mailto:cims@facsnsw.gov.au) if you're not sure of the sharing arrangements for your workgroup.

Further details on statewide search can be found in the Statewide Search Quick Reference Guide in CIMS.

Further details on record visibility can be found in the Client Sensitivity Quick Reference Guide in CIMS.

### Background: Workgroups and Clusters

Within CIMS, users access client data via a workgroup (which usually corresponds to a single SHS outlet or service) but the data itself is stored within a cluster. Each workgroup is associated with exactly one cluster, but it is possible for multiple related workgroups to be associated within a single cluster. This minimises duplication of client data and can simplify client management when multiple services (workgroups) provide support to a single client. However, this also means that all the workgroups which are associated within a single cluster are accessing the same client file and a standard client search is a search for clients that exist within the cluster to which the workgroup belongs.

**Table 1: Default access levels for client records**

Client Record	Who has access ...	
	When NOT Sensitive <sup>2</sup>	When Sensitive <sup>3</sup>
Person Name and Demographics <sup>1</sup>	State	Cluster
Alias Details	State	Cluster
Relationships	State	Cluster
SHS Support Period	Workgroup	Workgroup
Client Profile	Workgroup	Workgroup
Family Violence Risk Assessment	Workgroup	Workgroup

<sup>1</sup> Includes Family Name, Given Name, Date of Birth, Sex, Indigenous Status, Country of Birth, Year of Arrival, Language at Home, Date of Death, Comments (i.e. all the fields that appear on the Edit Primary Details panel on the Client Details page, excluding the extended LGBTQI data).

<sup>2</sup> The access levels shown are the default values, but may be changed at the time that the record is created or on any subsequent update.

<sup>3</sup> The access level cannot be changed when the client record is marked Sensitive and any existing records (except for those marked Cluster) which are not already restricted to workgroup visibility will be changed to workgroup visibility when the record is next saved.

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Client Record	Who has access ...	
	When NOT Sensitive <sup>2</sup>	When Sensitive <sup>3</sup>
Housing Application	Workgroup	Workgroup
Needs Assessment	Workgroup	Workgroup
Initial Assessment	State	Workgroup
Accompanying Person Attachment	Workgroup	Workgroup
Addresses	State	Workgroup
eContacts	State	Workgroup
Key Workers	Cluster	Workgroup
Notes	Workgroup	Workgroup
Payments	Workgroup	Workgroup
Accommodation	Workgroup	Workgroup
SHS Status Updates	Workgroup	Workgroup
Alerts	Workgroup	Workgroup
Consent	Workgroup	Workgroup
Referrals	Workgroup	Workgroup
Plans	Workgroup	Workgroup
Tasks	Workgroup	Workgroup
Documents	Workgroup	Workgroup
Memo	Workgroup	Workgroup

## Managing Visibility

### 1. View Visibility

Individual client records have a control labelled **May be viewed by** which is generally displayed towards the bottom of each record update form in CIMS.

Examples of the two possible visibility controls are shown in the screenshots to the right.

May be viewed by  Workgroup  Cluster

May be viewed by  Workgroup  Cluster  State

### 2. Update Visibility

Updating the visibility of a record simply involves selecting the appropriate option in the **May be viewed by** control and then saving the record. The change takes effect immediately.