Module 5
Using client records

The Client Record

The By Name List splits the client record into *tabs* which categorise information by function. Within each *tab,* information is sorted into *elements*, which are labelled in the top left corner. The information in each element is called a field. A glossary of all BNL fields is found in the *BNL Glossary*.

For the rest of the training, we will populate the client record you just created.

We start at the *Client* page. Think of this as the record's homepage, where you can find information on consent & enough details to accurately identify the client.

Press the access <name> record button to open the client record!

Summary   Consents   Service Provider Restrictions

First Name *   Benji

Last Name   Marshalling

Lead Worker

Lead Worker   ---

Client Details (Summary Tab)

The summary tab is designed to be a snapshot of a person, helping you quickly get up to speed with a person's journey and current situation.

This tab has five elements:

1. **Basic Information**: Basic information to identify, contact, and locate a person.
2. **Housing Summary**: Snapshot of key fields from the *Housing* tab.
3. **Support Summary**: Snapshot of key fields from the *Support* tab.
4. **Engagement Tips**: Tips to help build repour, and possible risks to workers.
5. **Timeline**: Timeline of updates to the record over time, helping you build an understanding of activities completed to date.

Spend a few minutes updating the summary tab with some key information

Client Details (Housing Tab)

The housing tab is designed to provide an overview of a person's housing journey, including their history and future goals.

This tab has three elements:

1. **Housing goal & status**: Snapshot of housing goal & status.

2. **Social Housing Application**: Snapshot of a person's social housing application. This includes the presence of any barriers preventing a successful application.

3. **Housing History**: A person's journey through housing and homelessness over time.

Spend a few minutes updating the housing tab with some key information

Housing Goal	---
Housing Status	Street

Social Housing Application

Last Update	25/02/2024
Modified By 🔒	SA Service Admin (Offline)
Housing Application Status	---
Date of Application Approval	---
Allocation Zone	---
Current Housing Offer	---
Outstanding Evidence	---
SH Tenancy Status	---

Housing History

Start ↓ ∨	End ∨

Client Details (Support Tab)

The support tab is designed to be a snapshot of a person's support needs, and the care networks in place to meet them.

This tab has four elements:

1. **Detailed Information**: Additional information to support the creation of an accurate case plan.

2. **Support Needs & Care Team**: A list of the persons identified support plan, their priority, who is meeting these needs, and the outcome of closed episodes of care.

3. **Financial Information**: Snapshot of key financial information.

4. **Health Summary**: Details of health or NDIS workers currently supporting the person

Spend a few minutes updating the support tab with some key information

Benji Marshalling - Saved
Client Detail

Summary   Housing   **Support**   Health   Surveys   History

Detailed Information

Primary Reason for
Experiencing   ---
Homelessness

First Nations Identity   ---

Support needs and care team details

Date Identified ↓ ∨	Priority ∨	Current Status ∨	Domain ∨

Rows: 0

Financial Information

CRN   ---

Client Details (Survey Tab)

If a client has completed a VI-SPDAT survey, a summary of the most recent survey will appear on the Survey tab.

Vulnerability factors are categorised by domain in tabs across, with any risks or flags appearing as a tick in the check box.

A list of all completed surveys is shown in the element at the bottom of the page.

Vulnerability

High	15
Vulnerability	VI Score

Vulnerability Factors and Flags

History	Risks	Physical Health	Mer

History

☑ Not supported by a homelessness service

☑ Possible Legal Matters

☐ History of Homelessness

Module 5

Exercise

A person has been accepted into your service and has told you they are on the By Name List. Navigate to the person's record and quickly get yourself up to speed. Assign yourself at the lead worker and make a few updates to reflect their change of circumstances.

Exercise: Buddy up with someone and swap records! In 2 minutes, familiarise yourself with the person's experience and situation. In 30 seconds, share what you've learnt with your buddy.

Assign yourself as the lead worker for the record. Make three updates; this must include an update to location, an update to lead service provider, and a new support network entry.

Thank you

We're here if you need us!
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