Client Consent (Edit) Screen

Updated on February 2018

Home > **Client Management (Search Client)** > **Consent** > New Consent/Update

Business Purpose:

The **Client Management – Consent** page allows the user to create a new or view an existing Client Consent.

How to:

1. To create a new Consent record, from the Client Management – Consent (list) page, click the New Consent action button to go to a new Client Consent detail page.
2. To view an existing Consent, from the Client Management – Consent (list) page, click on View in the **Actions** column for the Consent you want to see.
3. Enter the information* to be release and exchange in the consent (up to 512 characters maximum).
4. Select from a dropdown, the Program for which the consent information is being release *FROM.*
5. Enter the Agency Name and Contact Person Name, Title & Phone # for which the consent information is being release *TO*.
6. State the purpose of the consent information release (up to 512 characters maximum).
7. Select from the calendar the termination date of the consent.
8. Click on the Save action button to save the consent.
9. Click on the Sign action button to open up a signature pad window for the Client to sign the consent.
10. Click on the Preview Signature button to view the client signature in a pop-up window when applicable.

11. Click on the Print action button to print a finished copy of the signed consent form for the Client.

Important Notes:

1. A Consent can be withdraw early, before the original designated termination date.

2. Once the Consent is signed, it becomes view only. However, the consent can still be withdraw early prior to the original termination date.

3. The Notice with Regard to the Collection of Personal Information appears at the bottom of the SMIS Consent page.