

Security:

Sharing a client with another agency

This document provides step-by-step instructions for sharing a client outside of your agency with another agency. An ROI must be signed by the client.

After you have created the client (at your agency level):

From the Summary Tab:

Client -	(425) N	elson, I	3rian							1
(425) Nelson Release of I	n, Brian nformatior	1: None				-Sw	itch to /	Another Household M	ember- 🔻 Su	ıbmit
liont Information										
ent Informa						Serv	ce Tran	sactions		
Summary Client		Profile	Households	ROI		Entry / Exit Case Managers		Case Plans	Assessmen	
Name Date of Social S	Birth Security	Nelson, 01/25/1 544-11-	Brian 970 1111		Gender Primary Second	Race ary Rac	Male Whit	e (HUD)	(or	
Entry/	Exits Type		Entry Da	te E	xit Date		Househ	olds	Head of	Relationshi
rogram			1	11 🦯			iype		Household	Keldtonsin
UCAN-DC -	HUD		08/15/20			1 1		Single Parent		
UCAN-DC - ESGP	HUD		08/15/20			1	34 Male			
UCAN-DC - ESGP Add Entry	HUD	Showi	08/15/20	/-			*Nel	son, Brian	Yes	Self
Add Entry Exit	/ HUD	Showi	08/15/20				*Nelso	son, Brian on, Sam	Yes	Self Son



<u>Click</u> the red lock in the upper right hand corner

Client	Visibility						×				
C	lient										
A Client - Date Up Visibility	Note: This cli agency. You individually su System Admir (425) Nelson, f odated 08/i v Updated 08/i	ent is shared by other promay, however, restrict oth ch as assessment data an istrator may restrict this of Brian 20/2012 04:02:36 PM 20/2012 04:02:36 PM	viders and car ler pieces of d d services. In client for you.	n not be data you n extrem	restrict I add for e circum	ted by your r this client nstances, you					
Visibil	ity Groups										
	Group ID	Group Name	Group Type	e		Last Update	1				
•	3155	Oregon Housing and Community Services (OHCS) - SP(3147)	Public			08/20/2012					
۵	6740	ROCC - Region 1(3469)	Public	Visibili	ty Gro	oups Searc	1				×
				Search	acces	ss 3 _{ear}	Create New	Group			
				# A	вс	DEE	с н т т к		OPOR	<u>яти у </u>	X Y Z All
					Group	p ID Na	ne			Date Created	Last Updated
				0	4	AC	CESS(3627)			12/27/2011	12/27/2011
				0	6928	AC	CESS - EFSP(364	7)		12/29/2011	12/29/2011
				0	6925	AC	CESS - ESG(3644) 13		12/29/2011	12/29/2011
				0	6927	AC	CESS - HSP(3646	i)		12/29/2011	12/29/2011
				0	6924	AC Wo	CESS - Permanen odrow Pines - SH	It Supportive	Housing - (3643)	12/29/2011	12/29/2011
				0	6926	AC	CESS - TBA(3645	;)		12/29/2011	12/29/2011
				0	2182	CO	C - Access to Bui vice Occupations	ilding Trades s - SP(2265)	and Customer	08/05/2011	08/05/2011
				0	6896	CL	- Access to Se	vices(3616)		12/21/2011	12/21/2011
				0	6560	LG	- New Roads Day	Access(329	8)	08/10/2011	08/10/2011
								She	owing 1-9 of 9		

Exit

- 2 <u>Click</u> Add Visibility Group
- 3 <u>Enter</u> the Agency you want to share with (*Use the Agency, even if you include programs*) and <u>Click</u> Search
- (4) <u>Click</u> the green plus sign to the left of the Agency you want to share with

Client Visibility

C	lient										
Note: This client is shared by other providers and can not be restricted by your agency. You may, however, restrict other pieces of data you add for this client individually such as assessment data and services. In extreme circumstances, your System Administrator may restrict this client for you.											
Client -	Client - (425) Nelson, Brian										
Date Up	Date Updated 08/20/2012 04:02:36 PM										
Visibility	/ Updated 08/	20/2012 04:02:36 PM									
Visibili	Visibility Groups										
	Group ID	Group Name	Group Type	Last Updated							
•	Group ID 6908	Group Name ACCESS(3627)	Group Type Public	Last Updated 08/20/2012							
	Group ID 6908 3155	Group Name ACCESS(3627) Oregon Housing and Community Services (OHCS) - SP(3147)	Group Type Public Public	Last Updated 08/20/2012 08/20/2012							
	Group ID 6908 3155 6740	Group Name ACCESS(3627) Oregon Housing and Community Services (OHCS) - SP(3147) ROCC - Region 1(3469)	Group Type Public Public Public	Last Updated 08/20/2012 08/20/2012 08/20/2012							
	Group ID 6908 3155 6740 visibility Group	Group Name ACCESS(3627) Oregon Housing and Community Services (OHCS) - SP(3147) ROCC - Region 1(3469)	Group Type Public Public Public	Last Updated 08/20/2012 08/20/2012 08/20/2012							

5 You will then see the Agency you want to share with in the list of Visibility Groups, Click Exit and you have shared this client record

Note – turning OFF sharing, for a client who opts out, works just the same – click the lock icon on each data item and then click the red minus to remove the providers' ability to see the client data.

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