Sharing Information

CHOICES includes a security model that prohibits the ability for users to see forms that were created by another agency. This security model protects agency data, while maintaining ownership of forms. But sometimes forms or documents need to be shared. Sharing is a feature that allows individuals, documents and forms to be share to any one user(s) or agencies. Conversely sharing can be removed as easy as it was granted.

The sharing of information, documents and forms can be accomplished in various ways. It is important to understand them and how shared information can be found:

- If an agency is not providing a service, users within that agency will be able to find shared information using the CHOICES individual lookup feature unless the individual is shared to them. Begin by sharing the individual and then share the form(s).
- Sharing the individual information screen allows the shared user and or agency to view the Individual Information screen along with any documents uploaded in the Supporting Document folder. By sharing the individuals information screen will allow the users and agency to find individual using the individual look up feature.
- When information is shared to a user an email will be sent by CHOICES alerting them that a document was shared. This only works when sharing to another user and not to an agency.

NOTE: When sharing information to a User or Agency that is not providing a service to the Individual, begin by sharing only the relevant form(s) they will need to see, in order to alleviate possible HIPAA violations. Only share the Individual if the User or Agency need to see all of the Individual’s information contained in the forms and supporting documents.

How to check if an Agency is providing services

In the Workplace column, click on the Individuals link. Find the Individual using the Search for Records field in the upper right portion of the screen.
Select Program Enrollments.

A list of programs will be displayed. If the agency appears, then sharing the individual to an agency of user will not be necessary.

**How to share an Individual to a User or Agency**

In the Workplace column, click on the Individuals link. Find the Individual using the Search for Records field in the upper right portion of the screen.

Open their record by clicking on their name.
In the upper left portion of the screen, select “Share” from the **Sharing** drop down.

The sharing window displays. In this example the individual has not been shared. Under Common Tasks you will notice the Add User/Team and Remove Selected Items. These are the two tasks that will be used the most.
In the Common Task column, click “Add User/Team” to display the Look Up Records pop-up box for a list of CHOICES users to whom you can share the record.
The Look Up Records pop-up box is defaulted to “User.” Team is synonymous to Agency.

Enter the user’s name in the Search window and click the Look Up icon.

Check the box next to the user’s name to be shared and then click the “Add” button.
If additional users or agencies need to be added, repeat process adding as many users of agency necessary before clicking the “OK” button.

**NOTE:** In selecting a Team, all CHOICES users at that particular agency will have access to the form.

Shared users and agencies will be listed. To stop sharing to a user or agency, place a check mark in the associated box and click Remove Selected Items. Click “OK” to return to the individuals information screen.

**NOTE:** Write, Delete, Append, Assign and Share boxes have been disabled, thus they do not work.

**Sharing a form**

In the Workplace column, click on the Individuals link. Find the Individual using the Search for Records field in the upper right portion of the screen.
Open their record by clicking on their name.

In the Individual Information screen, select the form to be shared. In this example, we will be sharing an ISP. Click on the Individualized Service Plan link.
Place a checkmark in the box that corresponds to the form being shared. Then select Sharing, top of the page on the screen ribbon.

The sharing window displays. In this example the information has not been shared. Under Common Tasks you will notice the Add User/Team and Remove Selected Items. These are the two tasks that will be used the most.
In the Common Task column, click “Add User/Team” to display the Look Up box for a list of CHOICES users to whom you can share the record.

The Look up box displays and defaults to “User.” Team is synonymous to Agency.

Enter the user’s name in the Search window and click the Look Up icon.
Check the box next to the user’s name to be shared and click the “Add” button.

If additional users or agencies need to be added, repeat process adding as many users of agency necessary before clicking the “OK” button.

NOTE: In selecting a Team, all CHOICES users at that particular agency will have access to the form.
Shared users and agencies will be listed. To stop sharing to a user or agency, place a check mark in the associated box and click Remove Selected Items. Click OK to return to the individuals information screen.

**NOTE:** Write, Delete, Append, Assign and Share boxes have been disabled, thus they do not work.