

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:

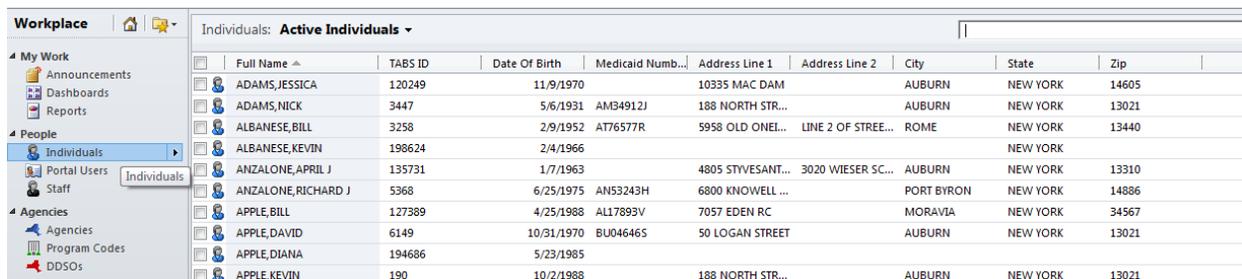
- If an agency is not providing a service, users within that agency will be able to find shared information using the CHOICES Individual lookup feature unless the individual is shared to them. Begin by sharing the individual and then share the form(s).
- Sharing the individual information screen allows 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.



The screenshot shows the 'Workplace' interface with a sidebar on the left containing navigation options like 'My Work', 'People', and 'Agencies'. The main area displays a table of 'Active Individuals' with columns for Full Name, TABS ID, Date Of Birth, Medicaid Number, Address Line 1, Address Line 2, City, State, and Zip.

Full Name	TABS ID	Date Of Birth	Medicaid Num...	Address Line 1	Address Line 2	City	State	Zip
ADAMS, JESSICA	120249	11/9/1970		10335 MAC DAM		AUBURN	NEW YORK	14605
ADAMS, NICK	3447	5/6/1931	AM34912J	188 NORTH STR...		AUBURN	NEW YORK	13021
ALBANESE, BILL	3258	2/9/1952	AT76577R	5958 OLD ONE...	LINE 2 OF STREE...	ROME	NEW YORK	13440
ALBANESE, KEVIN	198624	2/4/1966					NEW YORK	
ANZALONE, APRIL J	135731	1/7/1963		4805 STYVESANT...	3020 WIESER SC...	AUBURN	NEW YORK	13310
ANZALONE, RICHARD J	5368	6/25/1975	AN53243H	6800 KNOWELL ...		PORT BYRON	NEW YORK	14886
APPLE, BILL	127389	4/25/1988	ALL17893V	7057 EDEN RC		MORAVIA	NEW YORK	34567
APPLE, DAVID	6149	10/31/1970	BU04646S	50 LOGAN STREET		AUBURN	NEW YORK	13021
APPLE, DIANA	194686	5/23/1985						
APPLE, KEVIN	190	10/2/1988		188 NORTH STR...		AUBURN	NEW YORK	13021

Select Program Enrollments.

The screenshot shows the 'Individual' record for 'WILD, PATTY'. The left sidebar has 'Program Enrollments' selected. The main area displays a table of program enrollments.

Program Code	Individual	Enrollment Start Date	Enrollment End Date
02330110 -- CHENANGO R.C. SATELL. CLINIC	WILD,PATTY	11/29/2010	
02330141 -- HIGH-RISK BIRTH CLINIC	WILD,PATTY	6/14/2012	
02330142 -- HIGH RISK BIRTH CLINIC	WILD,PATTY	11/30/2010	
02330256 -- TRUMANSBURG DAY HAB	WILD,PATTY	5/25/2011	
02330460 -- JAMIE AVENUE IRA	WILD,PATTY	2/14/2012	
02330590 -- MA SERVICE COORDINATION-MSC	WILD,PATTY	2/1/2012	
60520964 -- CHEMUNG CO NYSARC IN_PV_0233	WILD,PATTY	1/2/2012	
77190912 -- HERITAGE FARM INC_GDH_0233	WILD,PATTY	6/14/2012	

At the bottom of the table, it shows '1 - 8 of 8 (0 selected)' and 'Page 1'. Below the table is a status bar with 'Status Active'.

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

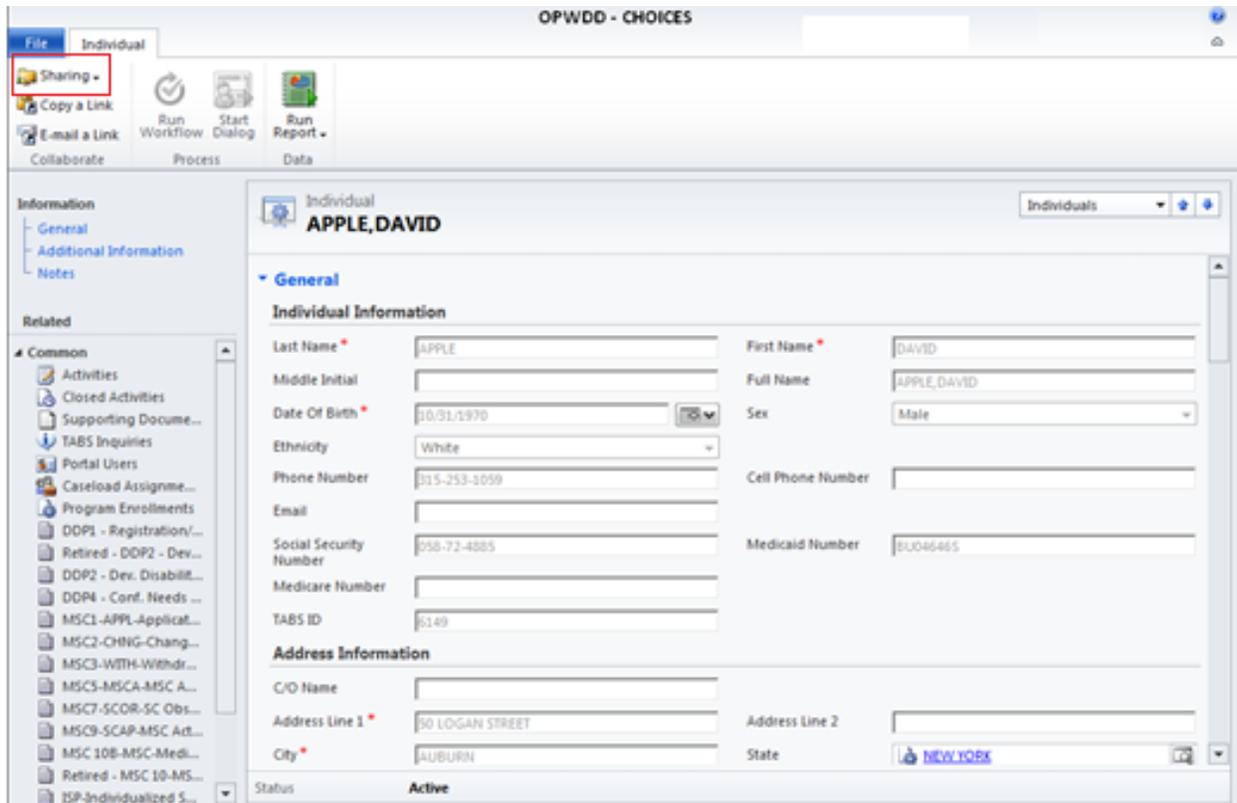
How to share an Individual to a User or Agency

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.

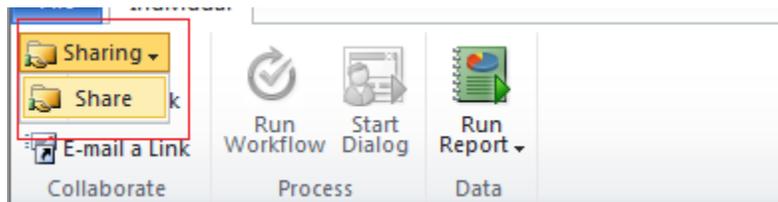
The screenshot shows the 'Workplace' view with 'Individuals' selected. The main area displays a table of individuals.

Full Name	TABS ID	Date Of Birth	Medicaid Numb...	Address Line 1	Address Line 2	City	State	Zip
ADAMS,JESSICA	120249	11/9/1970		10335 MAC DAM		AUBURN	NEW YORK	14605
ADAMS,NICK	3447	5/6/1931	AM34912J	188 NORTH STR...		AUBURN	NEW YORK	13021
ALBANESE,BILL	3258	2/9/1952	AT76577R	5958 OLD ONEI...	LINE 2 OF STREE...	ROME	NEW YORK	13440
ALBANESE,KEVIN	198624	2/4/1966					NEW YORK	
ANZALONE,APRIL J	135731	1/7/1963		4805 STYVESANT...	3020 WIESER SC...	AUBURN	NEW YORK	13310
ANZALONE,RICHARD J	5368	6/25/1975	AN53243H	6800 KNOWELL ...		PORT BYRON	NEW YORK	14886
APPLE,BILL	127389	4/25/1988	AL17893V	7057 EDEN RC		MORAVIA	NEW YORK	34567
APPLE,DAVID	6149	10/31/1970	BU04646S	50 LOGAN STREET		AUBURN	NEW YORK	13021
APPLE,DIANA	194686	5/23/1985						
APPLE,KEVIN	190	10/2/1988		188 NORTH STR...		AUBURN	NEW YORK	13021

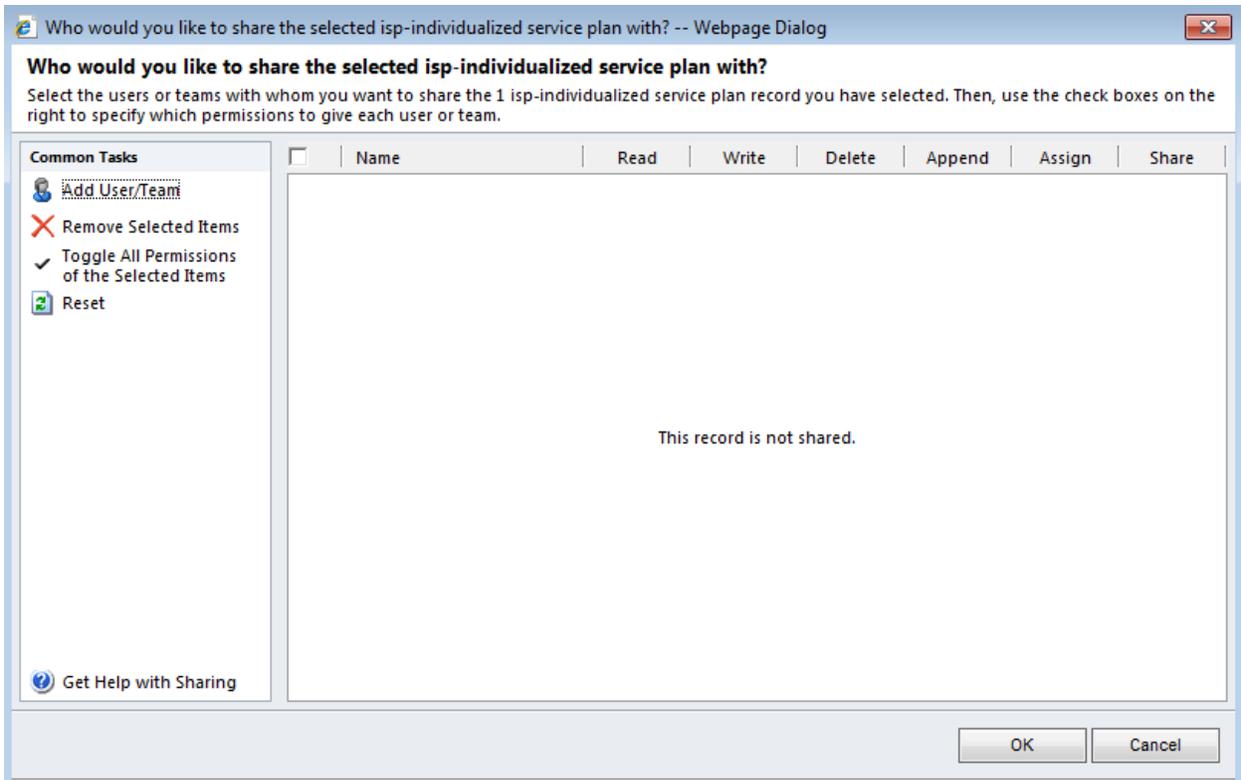
Open their record by clicking on their name.



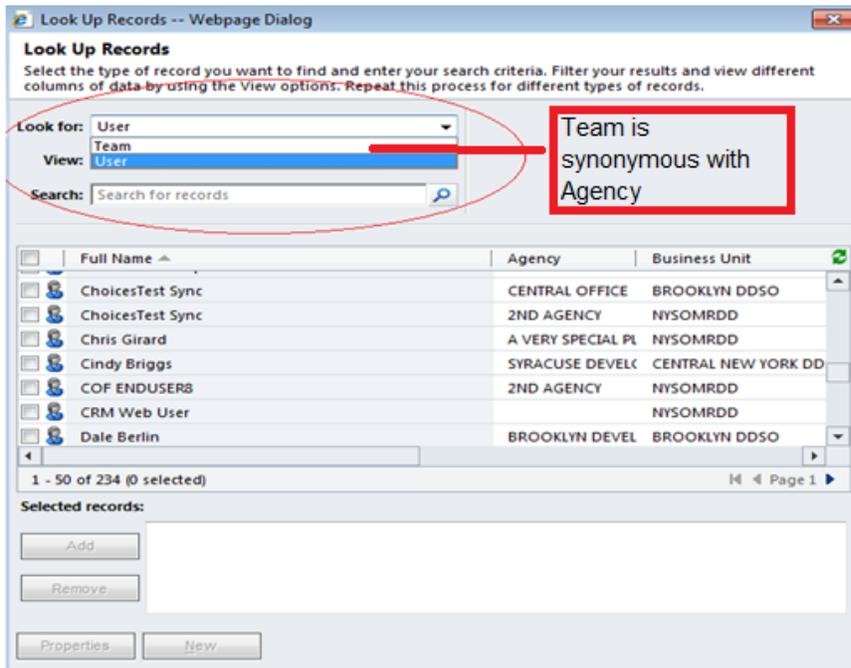
In the upper left portion of the screen, select “Share” from the **Sharing** drop down.



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.

Look Up Records
Select the type of record you want to find and enter your search criteria. Filter your results and view different columns of data by using the View options. Repeat this process for different types of records.

Look for: User
View: User Lookup View
Search: 

<input type="checkbox"/>	Full Name ▲	Agency	Business Unit	
<input type="checkbox"/>	 Ben Parmley	BROOKLYN DEVEL	BROOKLYN DDSO	
<input type="checkbox"/>	 Bernard Mantha	BROOKLYN DEVEL	CENTRAL NEW YORK DD	
<input type="checkbox"/>	 Bill Fletcher	SYRACUSE DEVEL	CENTRAL NEW YORK DD	

Check the box next to the user’s name to be shared and then click the “Add” button.

Full Name ▲ | Agency | Business Unit 

 Dean Benson | SYRACUSE DEVEL | CENTRAL NEW YORK DDSO

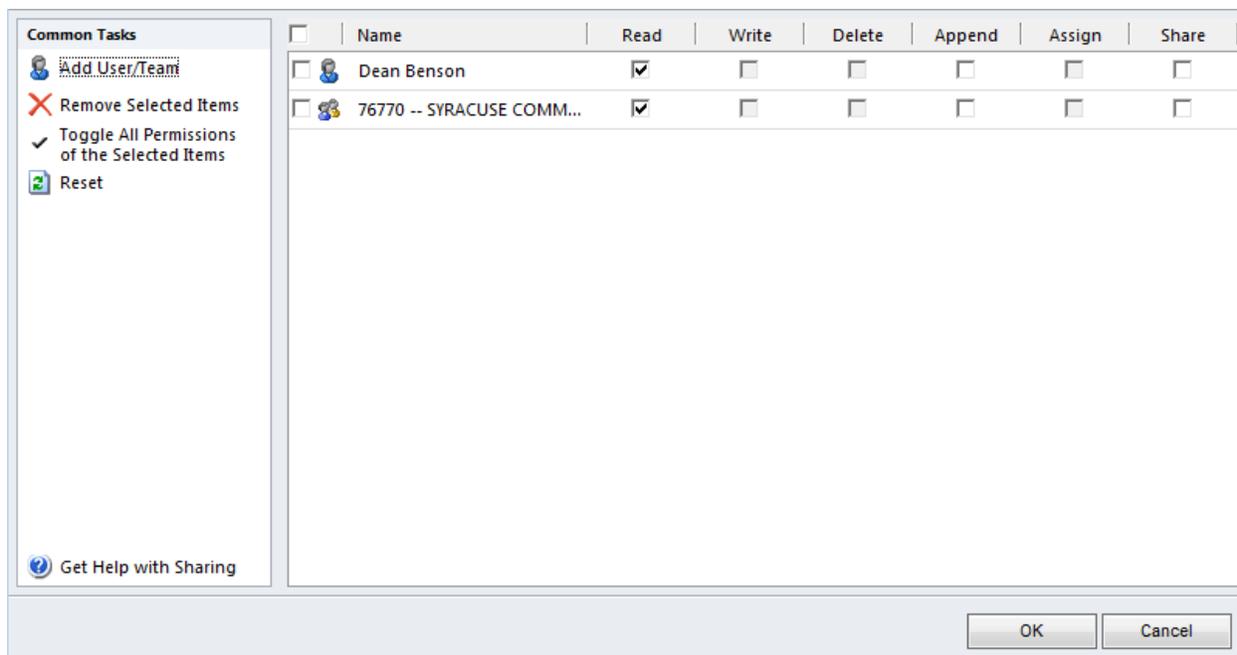
1 - 1 of 1 (1 selected) Page 1

Selected records:

 Dean Benson

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.

Full Name	TABS ID	Date Of Birth	Medicaid Numb...	Address Line 1	Address Line 2	City	State	Zip
ADAMS, JESSICA	120249	11/9/1970		10335 MAC DAM		AUBURN	NEW YORK	14605
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ALBANESE, BILL	3258	2/9/1952	AT76577R	5958 OLD ONEI...	LINE 2 OF STREE...	ROME	NEW YORK	13440
ALBANESE, KEVIN	198624	2/4/1966					NEW YORK	
ANZALONE, APRIL J	135731	1/7/1963		4805 STYVESANT...	3020 WIESER SC...	AUBURN	NEW YORK	13310
ANZALONE, RICHARD J	5368	6/25/1975	ANS3243H	6800 KNOWELL ...		PORT BYRON	NEW YORK	14886
APPLE, BILL	127389	4/25/1988	AL17893V	7057 EDEN RC		MORAVIA	NEW YORK	34567
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APPLE, DIANA	194686	5/23/1985						
APPLE, KEVIN	190	10/2/1988		188 NORTH STR...		AUBURN	NEW YORK	13021

Open their record by clicking on their name.

OPWDD - CHOICES
File Individual

Sharing
Copy a Link
E-mail a Link
Run Workflow
Start Dialog
Run Report

Information

- General
- Additional Information
- Notes

Related

- Common
- Activities
- Closed Activities
- Supporting Docume...
- TABS Inquiries
- Portal Users
- Caseload Assignme...
- Program Enrollments
- DDP1 - Registration/...
- Retired - DDP2 - Dev...
- DDP2 - Dev. Disabilit...
- DDP4 - Conf. Needs ...
- MSC1-APPL-Applicat...
- MSC2-CHNG-Chang...
- MSC3-WITH-Withdr...
- MSC5-MSCA-MSC A...
- MSC7-SCOR-SC Obs...
- MSC9-SCAP-MSC Act...
- MSC10B-MSC-Medi...
- Retired - MSC10-MS...
- ISP-Individualized S...

Individual
Individuals

APPLE, DAVID

General

Individual Information

Last Name *	APPLE	First Name *	DAVID
Middle Initial		Full Name	APPLE, DAVID
Date Of Birth *	10/31/1970	Sex	Male
Ethnicity	White	Cell Phone Number	
Phone Number	315-253-1059	Medicaid Number	BU04646S
Email			
Social Security Number	058-72-4885		
Medicare Number			
TABS ID	6149		

Address Information

C/O Name		Address Line 2	
Address Line 1 *	50 LOGAN STREET	City *	AUBURN
		State	NEW YORK

Status **Active**

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.

10/19/2012

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OPWDD - CHOICES TestCAY035 TestCAY035 choicestest1

File Individual ISP-Individualized Service Plan

Records Collaborate Current View View Help Process Data

Information General Additional Information Notes

Related Common Activities Closed Activities Supporting Docume... TABS Inquiries Portal Users Caseload Assignme... Program Enrollments DDP1 - Registration/... Retired - DDP2 - Dev... DDP2 - Dev. Disabilit... DDP4 - Conf. Needs ... MSC1-APPL-Applicat... MSC2-CHNG-Chang... MSC3-WITH-Withdr... MSC5-MSCA-MSC A... MSC7-SCOR-SC Obs... MSC9-SCAP-MSC Act... MSC10B-MSC-Medi... Retired - MSC10-MS... **ISP-Individualized S...**

Individual APPLE,BILL

ISP-Individualized Service Plan: **ISP Associated View**

Name	ISP type	ISP Date	Review Date	ISP Review	Form Status	Stat
ISP for APPLE,BILL	New/Initial				Saved	Active

1 - 1 of 1 (0 selected) Page 1

Status Active

View ISP Individualized Service Plan http://choicestest1.dyw...ndType=10002&etc=10 Local intranet | Protected Mode: Off 100%

OPWDD - CHOICES TestCAY035 TestCAY035 choicestest1

File Individual ISP-Individualized Service Plan

Records Collaborate Current View View Help Process Data

Information General Additional Information Notes

Related Common Activities Closed Activities Supporting Docume... TABS Inquiries Portal Users Caseload Assignme... Program Enrollments DDP1 - Registration/... Retired - DDP2 - Dev... DDP2 - Dev. Disabilit... DDP4 - Conf. Needs ... MSC1-APPL-Applicat... MSC2-CHNG-Chang... MSC3-WITH-Withdr... MSC5-MSCA-MSC A... MSC7-SCOR-SC Obs... MSC9-SCAP-MSC Act... MSC10B-MSC-Medi... Retired - MSC10-MS... **ISP-Individualized S...**

Individual APPLE,BILL

ISP-Individualized Service Plan: **ISP Associated View**

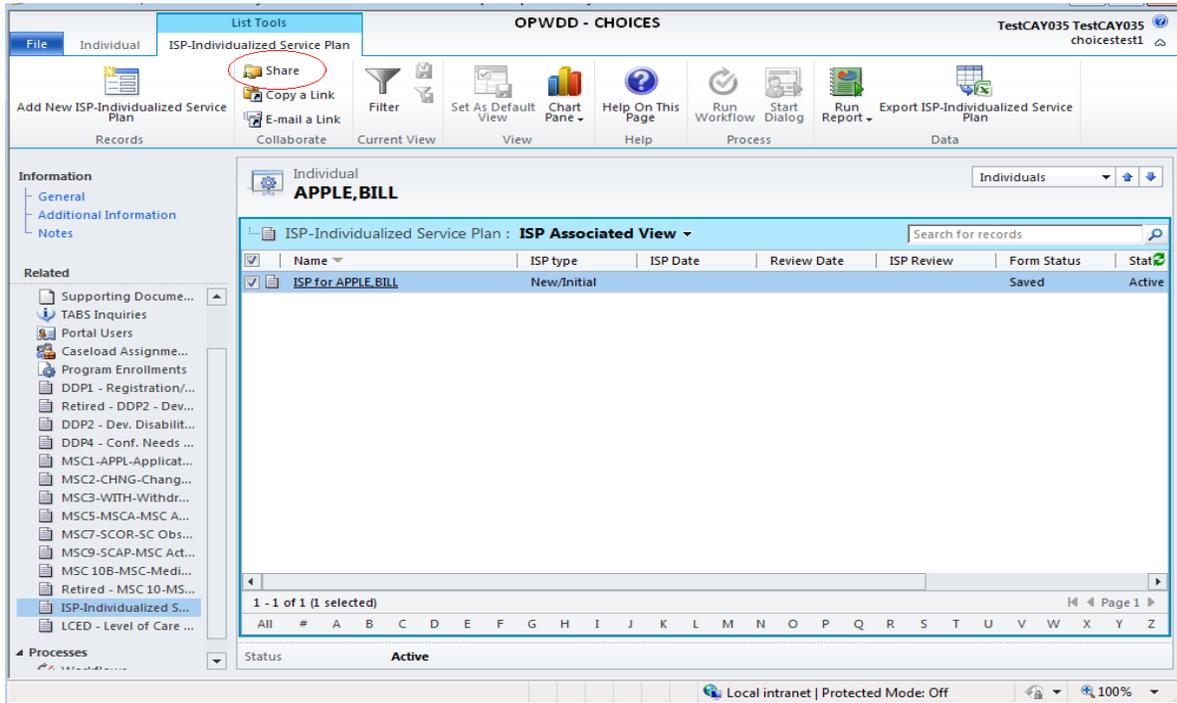
Name	ISP type	ISP Date	Review Date	ISP Review	Form Status	Stat
<input checked="" type="checkbox"/> ISP for APPLE,BILL	New/Initial				Saved	Active

1 - 1 of 1 (1 selected) Page 1

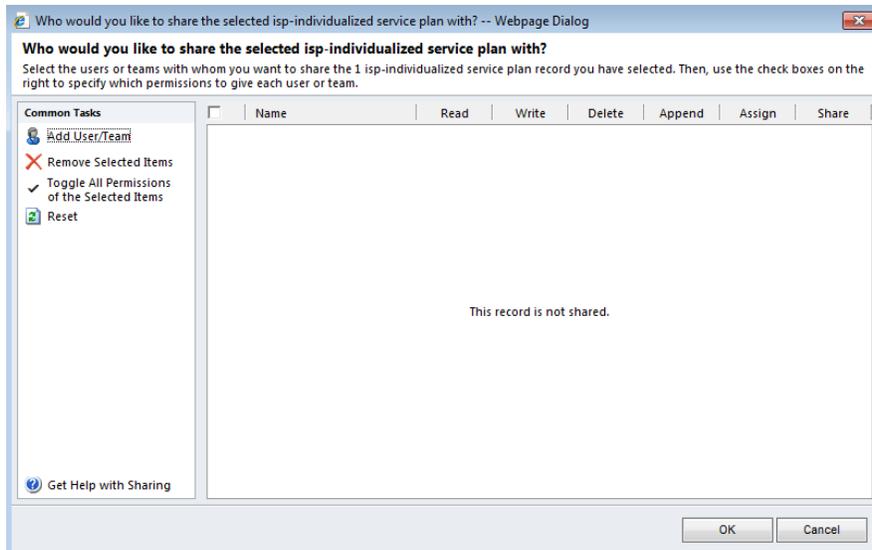
Status Active

Done Local intranet | Protected Mode: Off 100%

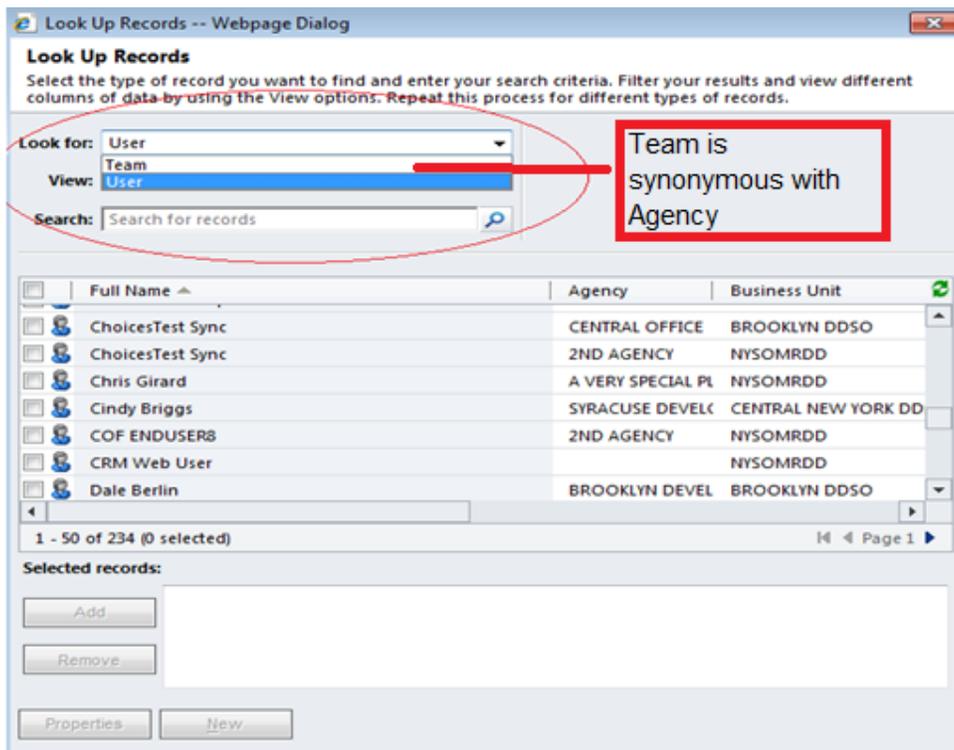
Place a checkmark in the box that corresponds to the form being shared. Then select Sharing, top of the page on the screen ribbon.



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.

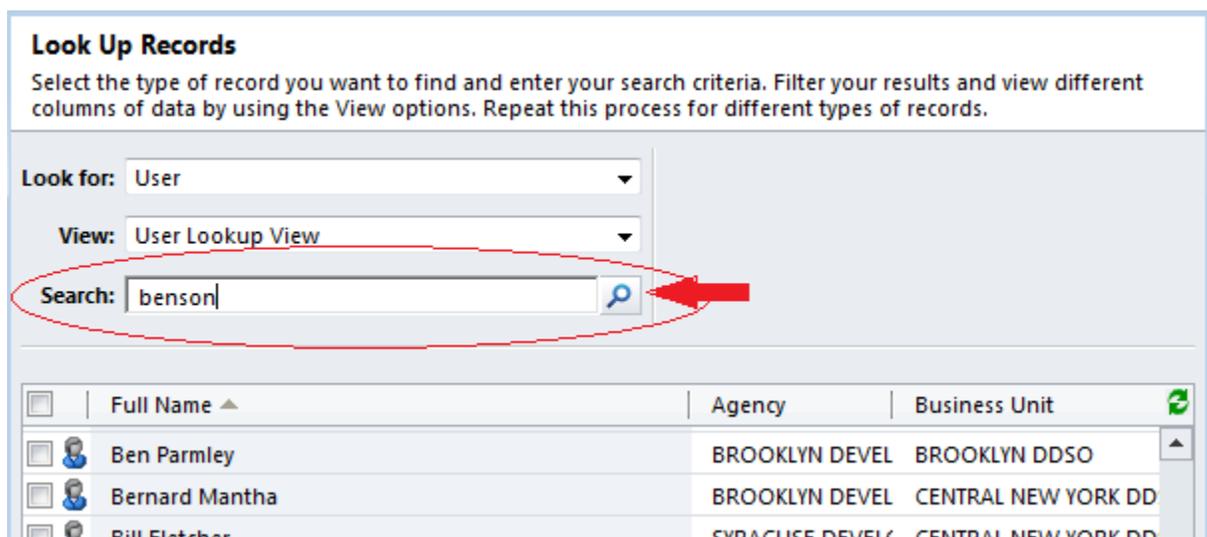


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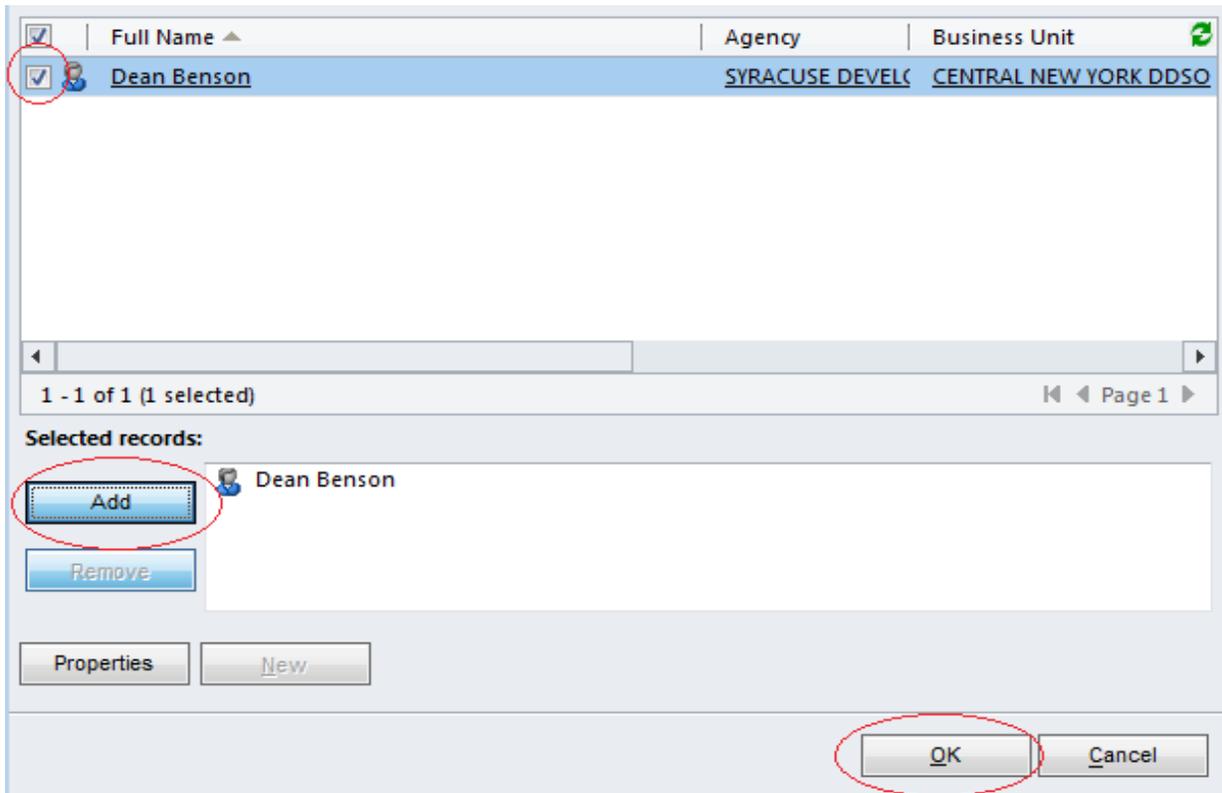


The Look up box displays and defaults to “User.” Team is synonymous to Agency.

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

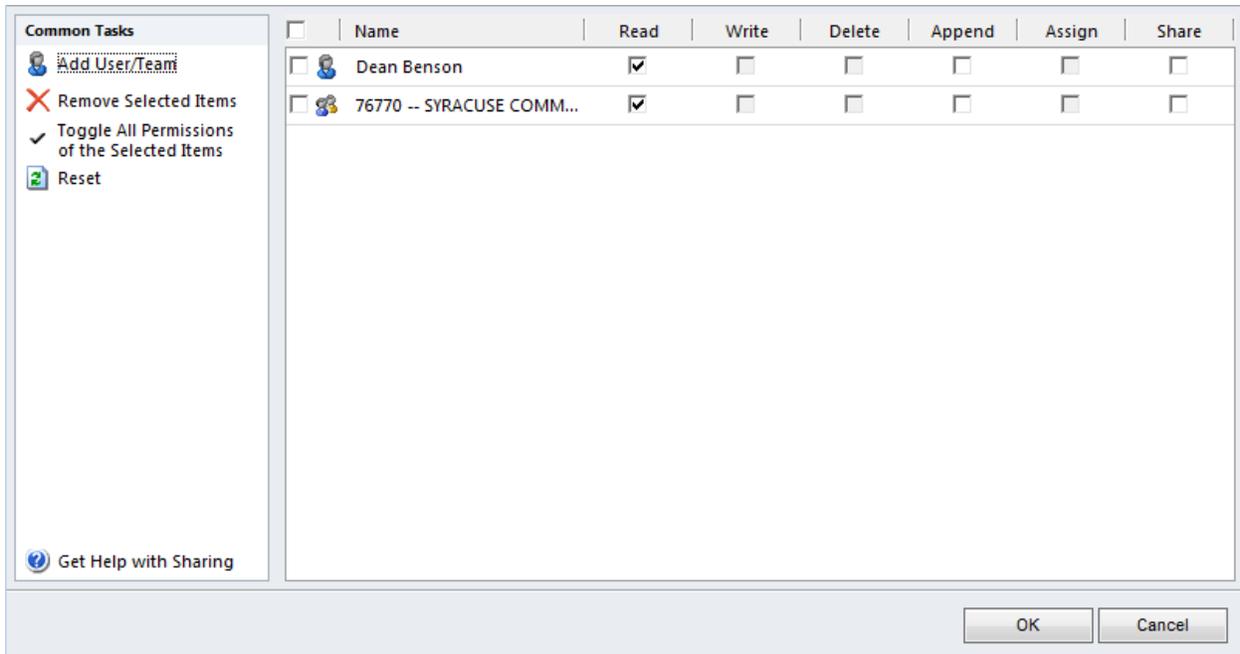


Check the box next to the user's name to be shared and click the "Add" button.



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.



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