

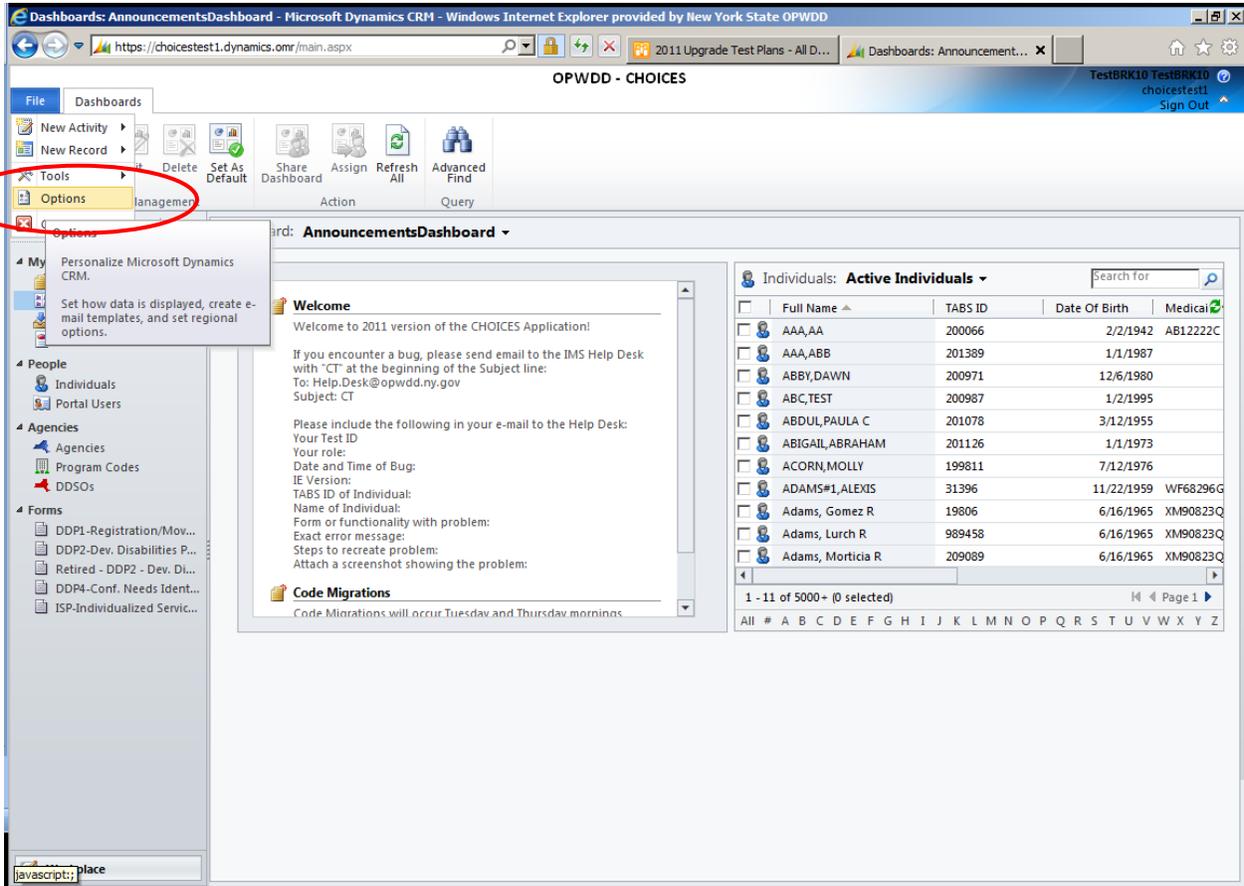
[View User Profile](#)

This section will show the user how to view their User Profile. In the User Profile you can check your email address, Phone number, Role and Business Unit in the CHOICES Application.

[User Profile](#)

From the main CHOICES Screen, click **File** menu.

Select **Options**.



The screenshot shows the Microsoft Dynamics CRM interface for the 'OPWDD - CHOICES' application. The 'File' menu is open, and the 'Options' option is highlighted with a red circle. The main content area displays a 'Welcome' message and a table of 'Active Individuals'.

File | Dashboards

- New Activity
- New Record
- Tools
- Options**
- Management

Options dropdown menu:

- Personalize Microsoft Dynamics CRM.
- Set how data is displayed, create e-mail templates, and set regional options.

Welcome

Welcome to 2011 version of the CHOICES Application!

If you encounter a bug, please send email to the IMS Help Desk with 'CT' at the beginning of the Subject line:
To: Help.Desk@opwdd.ny.gov
Subject: CT

Please include the following in your e-mail to the Help Desk:
Your Test ID
Your role:
Date and Time of Bug:
IE Version:
TABS ID of Individual:
Name of Individual:
Form or functionality with problem:
Exact error message:
Steps to recreate problem:
Attach a screenshot showing the problem.

Code Migrations
Code Migrations will occur Tuesday and Thursday mornings

Individuals: Active Individuals

| | Full Name | TABS ID | Date Of Birth | Medical |
|--------------------------|-------------------|---------|---------------|----------|
| <input type="checkbox"/> | AAA,AA | 200066 | 2/2/1942 | AB12222C |
| <input type="checkbox"/> | AAA,ABB | 201389 | 1/1/1987 | |
| <input type="checkbox"/> | ABBY,DAWN | 200971 | 12/6/1980 | |
| <input type="checkbox"/> | ABC,TEST | 200987 | 1/2/1995 | |
| <input type="checkbox"/> | ABDUL,PAULA C | 201078 | 3/12/1955 | |
| <input type="checkbox"/> | ABIGAIL,ABRAHAM | 201126 | 1/1/1973 | |
| <input type="checkbox"/> | ACORN,MOLLY | 199811 | 7/12/1976 | |
| <input type="checkbox"/> | ADAMS#1,ALEXIS | 31396 | 11/22/1959 | WF68296G |
| <input type="checkbox"/> | Adams, Gomez R | 19806 | 6/16/1965 | XM90823Q |
| <input type="checkbox"/> | Adams, Lurch R | 989458 | 6/16/1965 | XM90823Q |
| <input type="checkbox"/> | Adams, Morticia R | 209089 | 6/16/1965 | XM90823Q |

1 - 11 of 5000+ (0 selected) | Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

The **Set Personal Options** screen displays.

Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM, and manage your e-mail templates.

General | Workplace | Activities | Formats | E-mail Templates | E-mail | Privacy | Languages

Select your home page and settings for Get Started panes

Default Pane: Workplace | Default Tab: Dashboards

Show Get Started panes on all lists

Set the number of records shown per page in any list of records

Records Per Page: 50

Set the default mode for viewing forms

Form Mode: Organization default | Read-Optimized | Edit

Select the default mode in Advanced Find

Advanced Find Mode: Simple | Detailed

Set the time zone you are in

Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Select a default currency

Currency: [Empty field]

Support high contrast settings

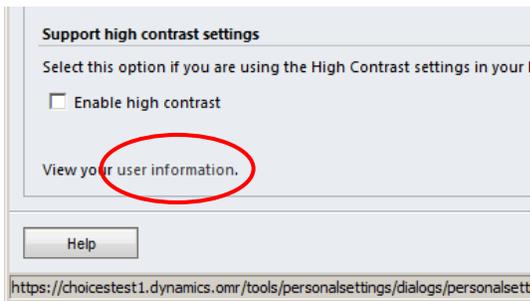
Select this option if you are using the High Contrast settings in your browser or operating system.

Enable high contrast

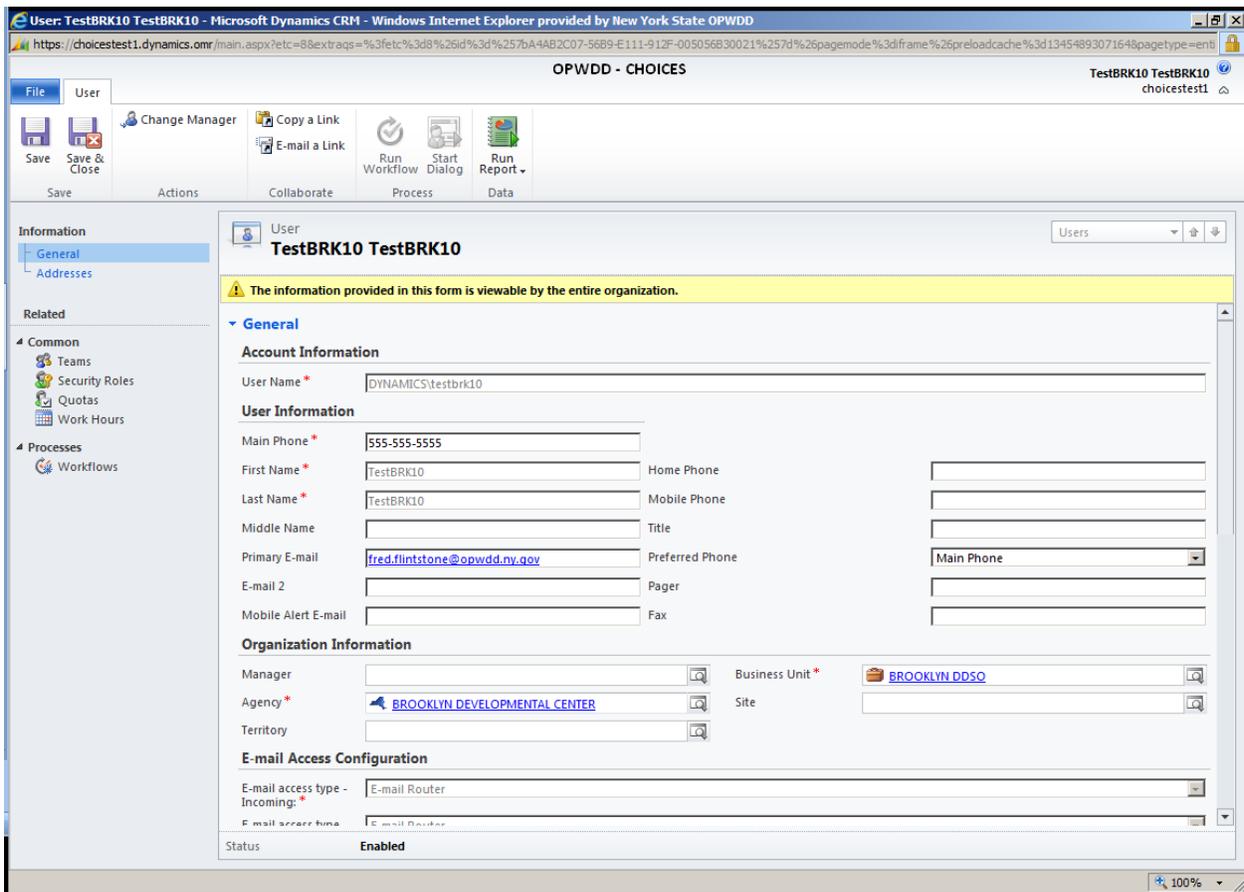
Help | OK | Cancel

https://choicetest1.dynamics.omr/tools/personalsettings/dialogs/personalsettings.aspx | Local intranet | Protected Mode: Off

Scroll down to the bottom of the **Set Personal Options** screen. There is a sentence that says, "View your user information." Click the words **user information** to open your User Profile.



Your User Profile Displays.



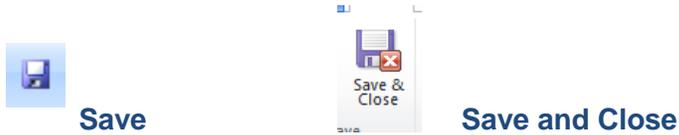
NOTE:

Please be sure that your Phone Number and Primary E-mail address are entered correctly. There is an auto-email process in CHOICES, where you will receive updates about documentation via email.

To update information, simply click inside the field and type the updated information.



Once you have updated any information click **Save** to save your changes or **Save and Close** to Save your changes and close your **User Profile**.



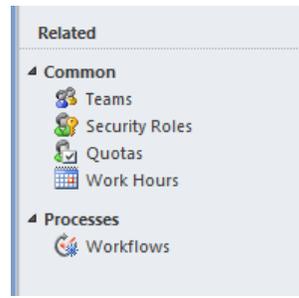
Business Unit and Agency

In the **Organization Information** section of the **User Profile** you can see what **Business Unit** and **Agency** you are assigned to.

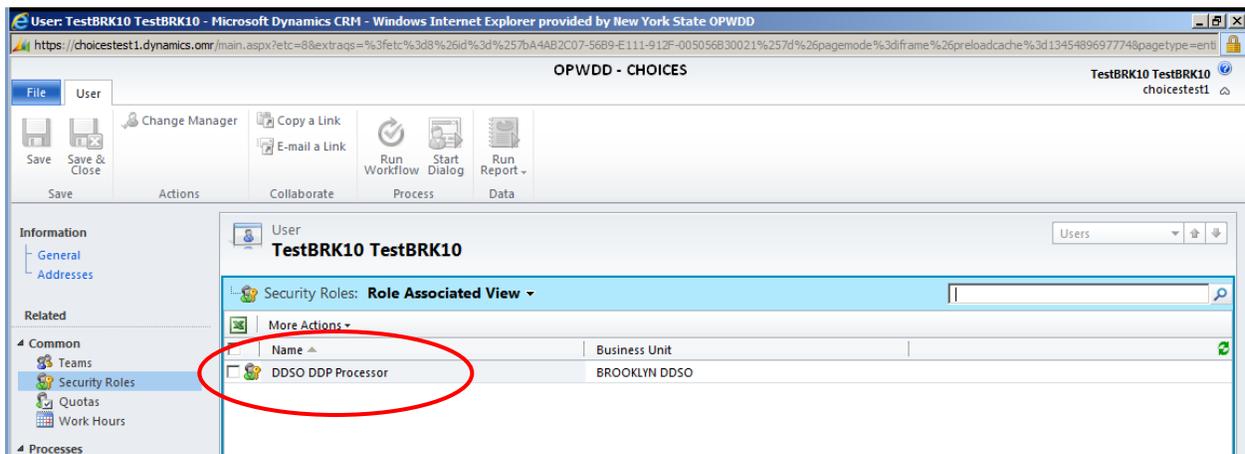
A screenshot of the Microsoft Dynamics CRM user profile form for 'TestBRK10 TestBRK10'. The form is displayed in a browser window titled 'OPWDD - CHOICES'. The 'Organization Information' section is highlighted with a red box, showing the 'Agency' as 'BROOKLYN DEVELOPMENTAL CENTER' and the 'Business Unit' as 'BROOKLYN DDSO'. Other fields include 'User Name', 'Main Phone', 'First Name', 'Last Name', 'Middle Name', 'Primary E-mail', 'E-mail 2', 'Mobile Alert E-mail', 'Home Phone', 'Mobile Phone', 'Title', 'Preferred Phone', 'Pager', and 'Fax'. The 'E-mail Access Configuration' section shows 'E-mail access type - Incoming' as 'E-mail Router' and 'Status' as 'Enabled'. A yellow warning banner at the top of the form states: 'The information provided in this form is viewable by the entire organization.'

Roles

You can also view what role is assigned by clicking **Security Roles** in the **Common** section in the left-hand column.



Your Role is listed under the Name column; your Business Unit also displays.



Exit User Profile

To close out of the **User Profile**, click **X** to exit.

From the **Set Personal Options** page, click **OK** or **Cancel**.

