



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) Nelson, Brian 1 

(425) Nelson, Brian
Release of Information: **None** -Switch to Another Household Member-

Client Information Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Added to the system 08/20/2012 04:02 PM

Name	Nelson, Brian	Gender	Male
Date of Birth	01/25/1970	Primary Race	White (HUD)
Social Security	544-11-1111	Secondary Race	



Entry/Exits				Households			
Program	Type	Entry Date	Exit Date	ID	Type	Head of Household	Relationship
UCAN-DC - ESGP	HUD	 08/15/2011 		 184	Male Single Parent		
Add Entry / Exit Showing 1-1 of 1					*Nelson, Brian	Yes	Self
					Nelson, Sam	No	Son

1 [Click the red lock in the upper right hand corner](#)

Client Visibility



Client

 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 - (425) Nelson, Brian

Date Updated 08/20/2012 04:02:36 PM

Visibility Updated 08/20/2012 04:02:36 PM

Visibility Groups

	Group ID	Group Name	Group Type	Last Updated
	6908	ACCESS(3627)	Public	08/20/2012
	3155	Oregon Housing and Community Services (OHCS) - SP(3147)	Public	08/20/2012
	6740	ROCC - Region 1(3469)	Public	08/20/2012

Add Visibility Group

Showing 1-3 of 3

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Exit

- 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.