



Utilities: Share Case – HCM Job Aid

The *Share Case* screen allows users to share view and/or edit access to all or part of a case with another user.

Share Case

Case Sharing

Select Staff

-Select-

Save

☐ Case Details

☐ Grant View Permissions

☐ Grant Write Permissions

☐ Household Info	☐	☐
☐ Demographics	☐	☐
☐ Involvement	☐	☐

☐ Referrals	☐	☐
☐ Document Folder	☐	☐
☐ Activity Log	☐	☐

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Utilities** tile. Then click on the **Share Case** tile.



Case Sharing

1. **Case Sharing** pane: Use this pane to give another user full or partial access to the case in focus. Viewing access (*View Permissions*) and/or Editing access (*Write Permissions*) can be given on a per screen basis.

☐ Case Details	☐ Grant View Permissions	☐ Grant Write Permissions
☐ Household Info	☐	☐
☐ Demographics	☐	☐
☐ Involvement	☐	☐
☐ Referrals	☐	☐
☐ Document Folder	☐	☐
☐ Activity Log	☐	☐

- a. *Select Staff*: Select a user from the drop-down.
- b. Select the specific screen or screens to share access.
 - i. Viewing access (*View Permissions*): Check the desired screen's checkbox under the *Case Details* column or the *Grant View Permissions* column a specific screen or screens. Example:

☐ Case Details	☐ Grant View Permissions	☐ Grant Write Permissions
☒ Household	☒	☐

- ii. Editing access (*Write Permissions*): Click the desired screen's checkbox under the *Grant Write Permissions* column a specific screen or screens. Note that when *Write Permission* is given *View Permission* and *Case Details* are automatically selected as well. Example:

☐ Case Details	☐ Grant View Permissions	☐ Grant Write Permissions
☒ Household	☒	☒



2. Granting View Permissions to all of the Case screens: Check either the *Case Details* checkbox above the grid or the *Grant View Permissions* checkbox above the grid. This will automatically check all of the *Case Details* and *Grant View Permissions* checkboxes: Example:

☐ Case Details	☒ Grant View Permissions	☐ Grant Write Permissions
☒ Household	☒	☐
☒ Contact Information	☒	☐
☒ Demographics	☒	☐

3. Granting Write Permissions to all of the Case screens: Check the *Grant Write Permissions* checkbox above the grid. This will automatically check all of the *Case Details*, *Grant View Permissions*, and *Grant Write Permissions* checkboxes. Example:

☐ Case Details	☐ Grant View Permissions	☒ Grant Write Permissions
☒ Household	☒	☒
☒ Contact Information	☒	☒
☒ Demographics	☒	☒

4. Click **Save** above the grid to save the Permissions. Once the Permissions are saved the user's name will have [Shared] next to it in the Select Staff drop-down:

Case Sharing

Permissions have been successfully saved.

Select Staff

[Shared] James Smith ☒

Save

5. Permissions can be revoked or added at any time by selecting the individual's name from the Select Staff drop-down, updating their Permissions, and clicking **Save**.

Tip: Supervisors and Managers can update shared permissions on Cases assigned to their Unit.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm> or <http://dhsassist.dhs.allegheny.local> for internal users.