



Utilities – Share Case

MH Residential Job Aid

The *Share Case* screen allows the users to share view and/or edit access to all or part of a Case with another MH Residential ser.

Share Case

Case Sharing

Agency/Provider * Unit * Staff *

-Select- -Select- -Select-

Save

<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input type="checkbox"/> Grant Write Permissions
<input type="checkbox"/> Case Summary	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Treatment History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Risk Factors	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Legal History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Activity Log	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Case Notes	<input type="checkbox"/>	<input type="checkbox"/>

Navigation

1. Bring the Case into focus and navigate to **Utilities** → **Share Case** .

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 Sharing

Agency/Provider * A Unit * B Staff * C

-Select- -Select- -Select-

<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input type="checkbox"/> Grant Write Permissions
<input type="checkbox"/> Case Summary	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Treatment History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Risk Factors	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Legal History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Activity Log	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Case Notes	<input type="checkbox"/>	<input type="checkbox"/>

- a. *Agency/Provider*: Select the Agency/Provider of the user with whom the Case is being shared from the drop-down.
- b. *Unit*: Select the Unit of the user with whom the Case is being shared from the drop-down.
- c. *Staff*: Select the user with whom the Case is being shared from the drop-down. This drop-down will update based on the *Agency/Provider* selected.
- d. 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:

<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input type="checkbox"/> Grant Write Permissions
<input checked="" type="checkbox"/> Individual Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>



- 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:

<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input type="checkbox"/> Grant Write Permissions
<input checked="" type="checkbox"/> Individual Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


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:

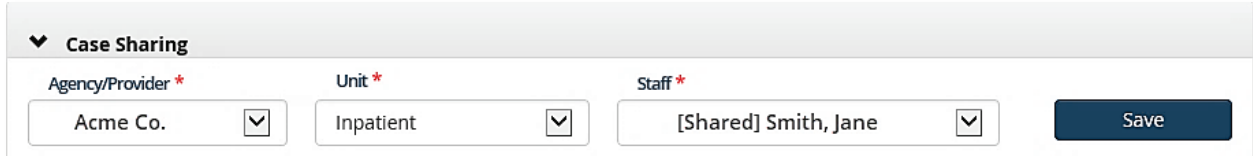
<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input type="checkbox"/> Grant Write Permissions
<input checked="" type="checkbox"/> Individual Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Referral Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Daily Living	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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:


<input type="checkbox"/> Case Details	<input type="checkbox"/> Grant View Permissions	<input checked="" type="checkbox"/> Grant Write Permissions
<input checked="" type="checkbox"/> Individual Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Referral Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Daily Living	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Tip: View Access to the Case Summary screen will automatically be given when any other screen is selected. This is because the Case Summary screen is the first screen that appears when a user navigates to a Case.

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



The screenshot shows a 'Case Sharing' form with three dropdown menus and a 'Save' button. The first dropdown is labeled 'Agency/Provider *' and has 'Acme Co.' selected. The second dropdown is labeled 'Unit *' and has 'Inpatient' selected. The third dropdown is labeled 'Staff *' and has '[Shared] Smith, Jane' selected. A dark blue 'Save' button is located to the right of the dropdowns.

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

Tip: Supervisors and Managers can also use the Share Case screen to update shared permissions on Cases assigned to their Unit or Program.

- Shared Cases will appear in their own pane on the dashboard of the user with whom the Case has been shared.

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.