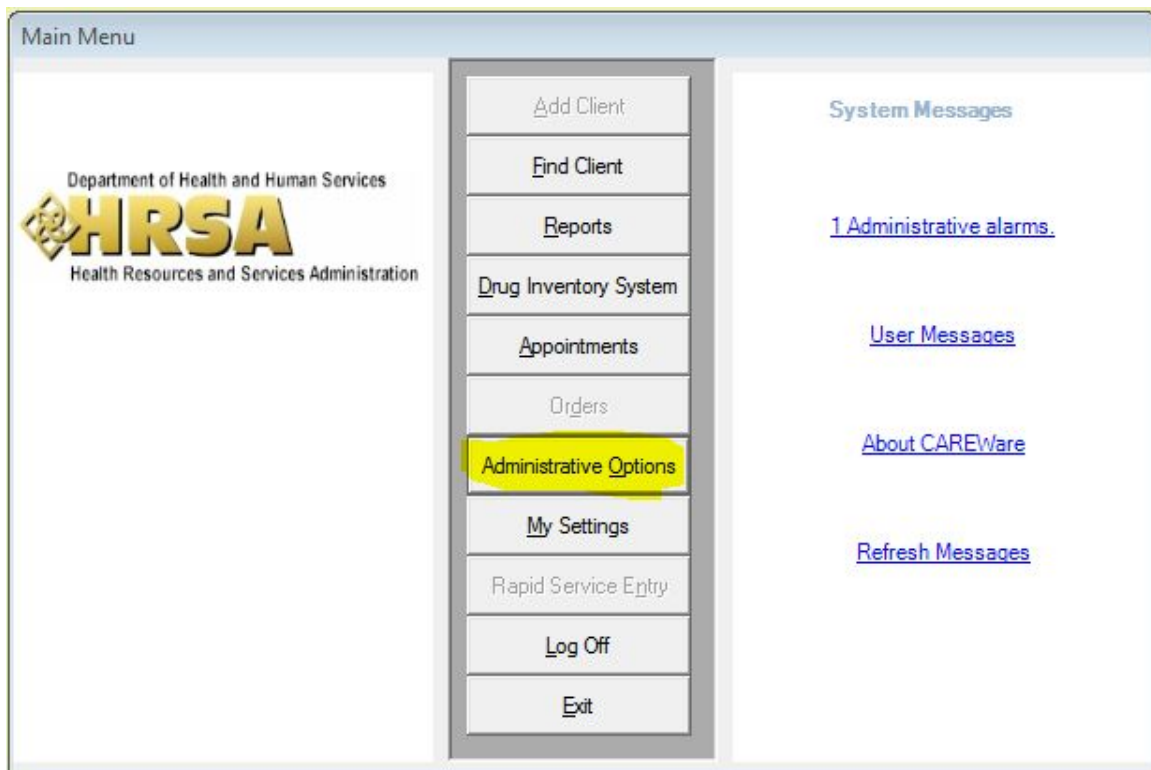


The Setup Wizard allows a user to setup sharing options for providers. These settings include provider by provider sharing and client by client sharing. The sharing options need to be activated prior to using the Provider By Provider Sharing menu or the Client by Client Sharing menu.

To access the sharing options in the Setup Wizard from the Central Administration domain follow the steps below.

1. Log into the Central Administration domain
2. Click Administrative Options
3. Click Setup Wizard
4. Click a provider domain to highlight it
5. Click Setup
6. Click Next
7. Click the checkbox to select funding sources
8. Click Next
9. Click Yes, I would like to review/change my data sharing options



Administrative Options

[Provider/User Manager](#)

[Setup Wizard](#)

[Contracts](#)

[Grantee Setup](#)

[Clinical Encounter Setup](#)

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[Client Matching Setup](#)

[Provider Data Import](#)

[Custom Report Field Setup](#)

[RSR Export](#)

[Email Alert Scheduler](#)

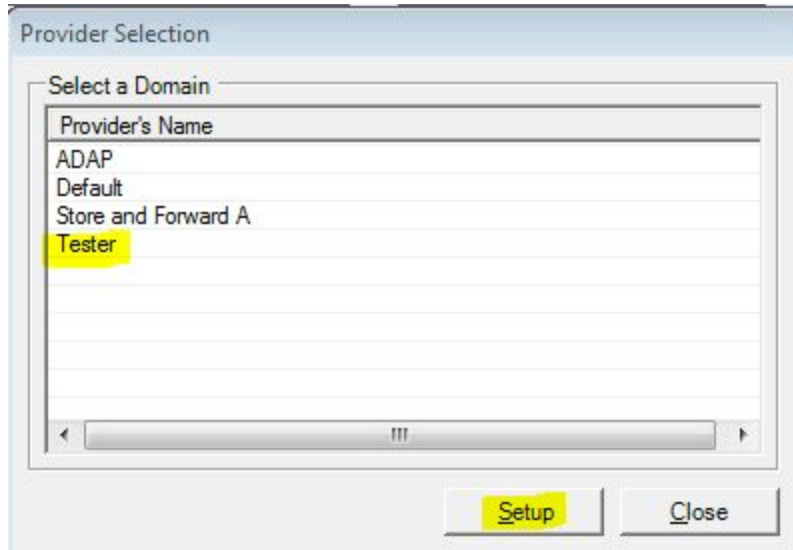
[Advanced Security Options](#)

[HL7 Feed Settings](#)

[Provider Data Export](#)

[Client by Client Sharing](#)

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Setup Wizard - Tester

CARE Act program(s)

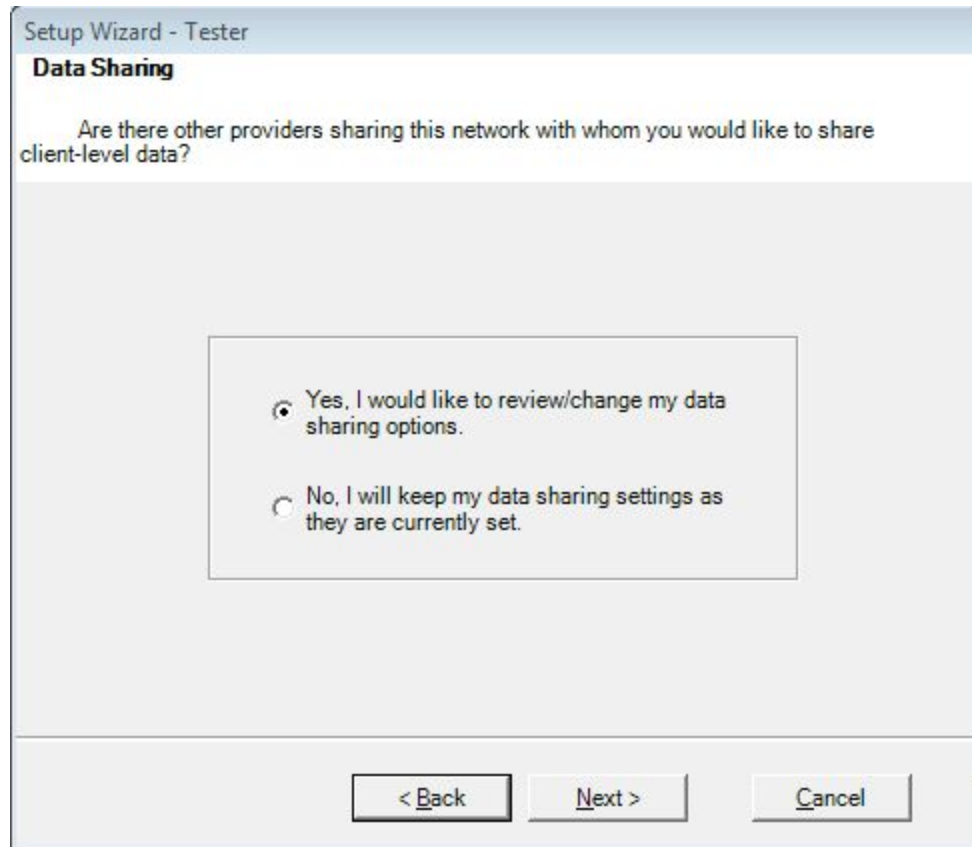
Please indicate the CARE Act program(s) for which you will be collecting client-level information.

- Part A
- Part B
- Part C
- Part D
- Health Insurance Program (HIP)

< Back

Next >

Cancel



Once the Setup Wizard has opened the sharing options, proceed through each option choosing a level and an Advanced Option.

Setup Wizard - Tester

Services

Click the button below to access service options.

Service Sharing level with other providers

- Level 1: Share all service records with all providers.
- Level 2: Share service records with providers who offer the same service categories. Only services under categories offered by both providers will be shared.
- Level 3: Share no service records with any other providers.

Advanced Options

- No Advanced Options (Default)
- Client-by-Client Sharing
 - Use default agreement length (days):
 - Expiration date is required
- Release of Information (ROI) Sharing

< Back Next > Cancel

Services have 3 levels of options, allowing a provider to share all services, share services with a provider that is also sharing services, and share no services. The Advanced Options for services include No Advanced Options, Client by Client, and Release of Information. Client by Client Sharing can be set here with a default agreement and/or expiration date. These settings can be adjusted in Client by Client Sharing on Administrative Options to further specify sharing of client data.

Setup Wizard - Tester

Clinical Data Security Level Settings

Clinical Data Security Level

- Level 1: Share clinical information only with other providers that have proper permission.
- Level 2: Share no provider specific clinical information with other providers.

Advanced Clinical Sharing Options

- Share all clinical data (default)
- Client by Client Sharing
 - Use default agreement length (days):
 - Expiration date is required
- Release Of Information (ROI) Sharing

< Back Next > Cancel

Clinical Data sharing has the same options as Services, except there is no option as a level to share clinical data with only providers that are sharing clinical data with this provider.

Setup Wizard - Tester

Case Notes Sharing

Case Notes Security Level

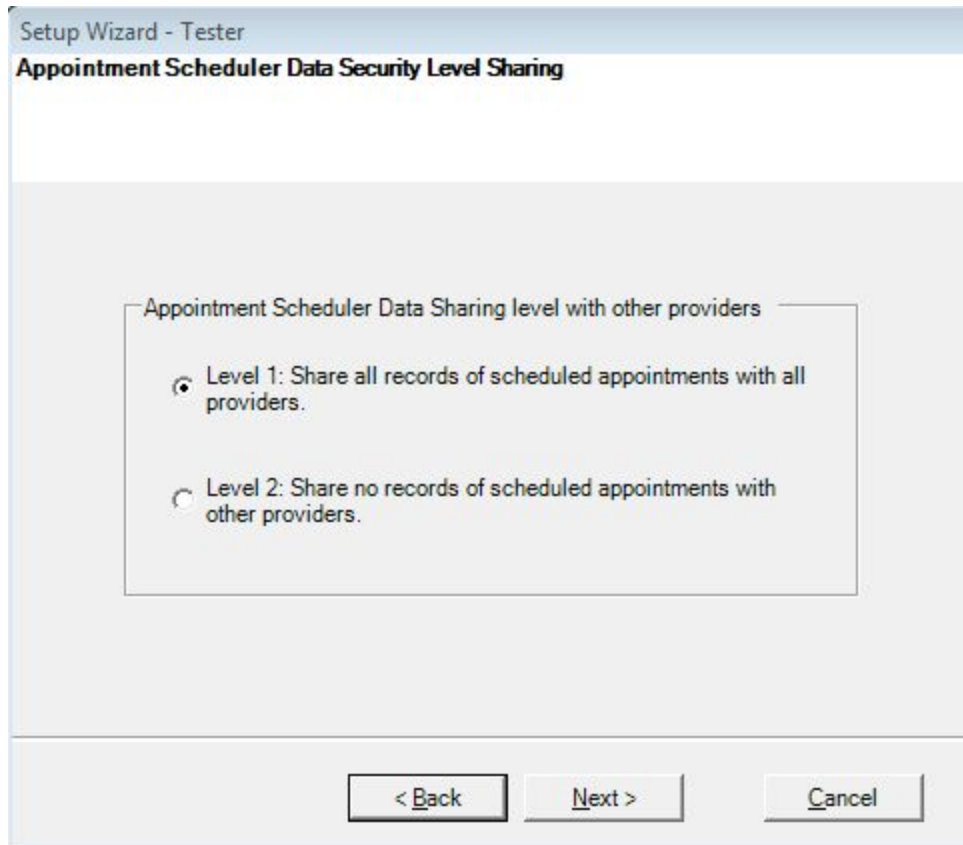
- Level 1: Share case notes only with other providers that have proper permission.
- Level 2: Share no case notes with other providers.

Advanced Clinical Sharing Options

- Client By Client Sharing
 - Use default agreement length (days):
 - Expiration date is required

< Back Next > Cancel

Case Notes sharing has the same level permissions as Clinical Data, however does not have an option to setup Release of Information as an advanced option.



Appointment Scheduler sharing has the option to share with other providers or not to share. There are no advanced options.

Setup Wizard - Tester

Custom Subform Sharing

Custom Subform Security Level

- Level 1: Share Custom Subform Data only with other providers that have proper permissions.
- Level 2: Do not share Custom Subform Data with other providers.

Client By Client Sharing

- Select clients for whom to share their Custom Subform Data
 - Use default agreement length (days):
 - Expiration date is required

< Back Next > Cancel

Custom Subform Sharing has the option to share with other providers, not share, and the advanced option for client by client sharing.

Setup Wizard - Tester

Form Designer Sharing

Form Design Security Level

Level 1: Share Form Designer Data only with other providers that have proper permissions.

Level 2: Do not share Form Designer Data with other providers.

Client By Client Sharing

Select clients for whom to share their Form Designer Data

Use default agreement length (days):

Expiration date is required

< Back Next > Cancel

Forms Designer sharing has the same sharing options as Custom Subform.

Once these sharing options have been chosen, option in Provider by Provider Sharing and Client by Client Sharing will be available for this provider. Selecting a level that requires another provider to share with this provider will require the other provider setting up provider sharing options before all sharing options will take affect.