

*Client by Client Sharing* allows *Providers* to select specific clients active in both providers to have shared records displayed. Once *Client By Client Sharing* is enabled for a provider under [Provider Setup](#), sharing requests appear in the client record for the data type shared between those providers.

Administrative Options > Provider Management > Provider Setup > Aatest1 > Service Sharing Setup

Edit Back

## Service Sharing Setup

Service Sharing level with other providers

Level 1: Share all service records with all providers.:

Level 2: Share service records with providers who provide services in the same category.:

Level 3: Share no service records with any other providers.:

Advanced Options

Client-by-client sharing?:

Default agreement length (days):

Require an expiration date for sharing agreements?:

Release of information (ROI) sharing?:

To review *Sharing Requests* follow these instructions:

1. Go to the *Show to Provider*.
2. Click *Find Client*.
3. Enter search criteria.
4. Click the client in the search results.
5. Click *View Details*.
6. Click *Sharing Requests*.

Find Client > Search Results > View Details > Sharing Requests

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## Sharing Requests

Incoming Service	No incoming requests
Outgoing Service	1 Granted Request
Incoming Case Note	No incoming requests
Outgoing Case Note	No providers share data for this client
Incoming Custom Subform	No incoming requests
Outgoing Custom Subform	No providers share data for this client
Incoming Form Designer	No incoming requests
Outgoing Form Designer	No providers share data for this client
Incoming Clinical	No incoming requests
Outgoing Clinical	1 Granted Request

7. Click an incoming or outgoing sharing request.

Find Client > Search Results > View Details > Sharing Requests > Outgoing Service

Add Delete Back Print or Export

### Outgoing Service

Search:

Provider	Share Type	Start Date	Expiration	Notes
Aatest1	Level 1			Automatic

If *Automatic* is listed under Notes, the sharing request is automatically granted. This typically occurs when *Provider By Provider Sharing* was set for the providers.

If *No request made* is listed in Notes, a user can initiate the request by selecting that *Provider* and clicking *Add*.

Client Resolution > View More Information > Personal Info > Demographics > Sharing Requests > Outgoing Service

Add Delete Back Print or Export

Search:

Provider	Share Type	Start Date	Expiration	Notes
AIDS R Us	Client By Client			Pending
Aatest1	Client By Client			No request made

If *Pending* is listed in Notes, the *Sharing Provider* needs to accept the request under *Incoming Requests* for that client.

Find Client > Search Results > View Details > Sharing Requests > Incoming Service

View Edit Back Print or Export

### Incoming Service

Search:

Provider	Agreement Signed	Expiration	Status
Btest1			Pending

The *Incoming Sharing Request* can be accepted by following these instructions:

1. Click the Pending request.
2. Click *Edit*.
3. Select the *Status Label* (Denied, Granted, or Pending).
4. Click *Save*.

Find Client > Search Results > View Details > Sharing Requests > Incoming Service

View Edit Back Print or Export

Search:

Provider	Agreement Signed	Expiration	Status
Btest1			Granted

Find Client > Search Results > View Details > Sharing Requests > **Outgoing Service**

Add Delete Back Print or Export

## Outgoing Service

Search:

Provider	Share Type	Start Date	Expiration	Notes
AIDS R Us	Client By Client			<b>Granted</b>
Aatest1	Client By Client			No request made

Once the *Incoming Sharing Request* is granted, the shared records appear in the client record for the *Sharing Provider*.

Find Client > Search Results > View Details > **Services**

View Add Delete Receipts Help Print or Export

## Services

Search:

Date	Subservice	Contract	Units	Price	Total	Amour	Provider
04/16/2021	COVID Medications	Btest Contract	1	0.0000	0.0000		<b>Btest1</b>
04/16/2021	COVID Medications	Atest Test Contract	1	0.0000	0.0000		Aatest1
04/16/2021	Clinical	Main ADAP Contrac	1	0.0000	0.0000		AIDS R Us