

Change a Provider's Visibility

To change a provider's visibility follow the steps outlined below.


1. Navigate to the **Provider Search Results** as described in the [Locate a Provider](#) section. (See Figure 1-1)

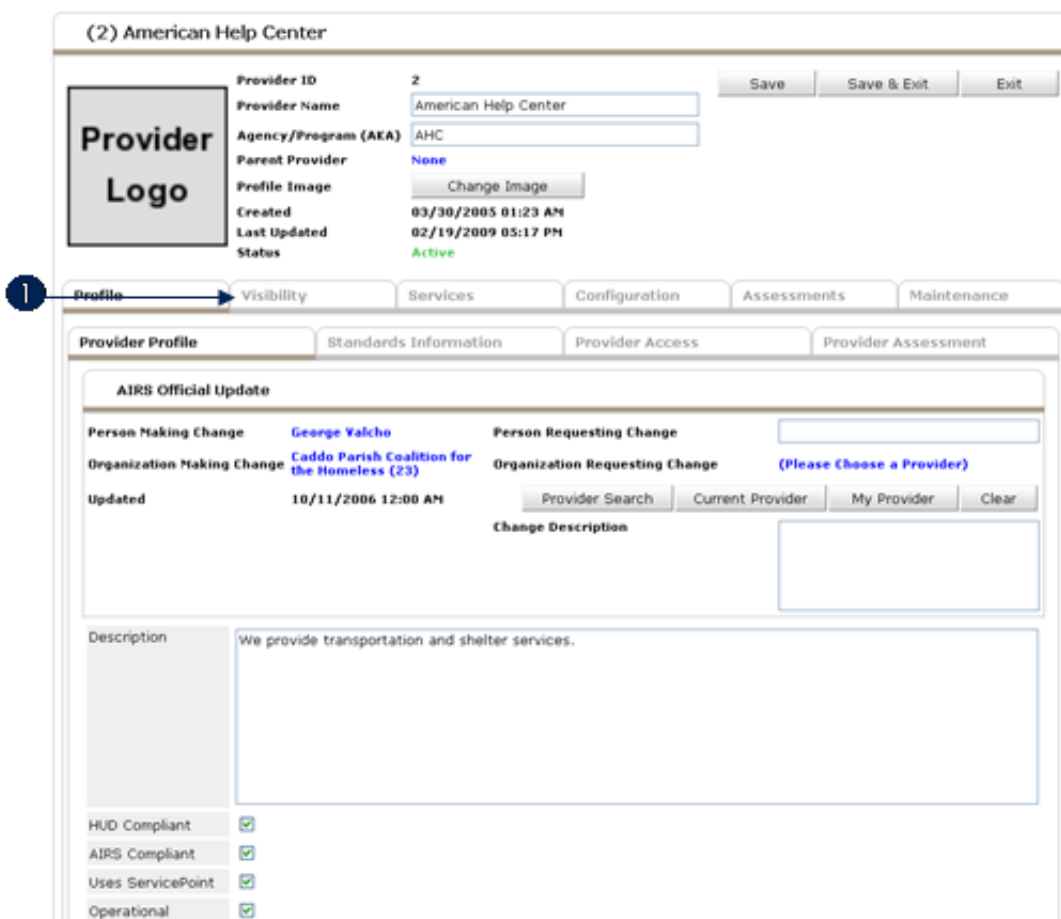


Provider Search Results				
	Provider ID	Name	Type	Last Updated
	2	American Help Center	Level 1	02/19/2009
	6	Capital Area Agency on Aging	Level 1	06/20/2006

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Figure 1-1

2. Click the **Edit** icon  or click the name of the provider. **(1)** (See Figure 1-2)



(2) American Help Center

Provider ID: 2
Provider Name: American Help Center
Agency/Program (AKA): AHC
Parent Provider: None
Profile Image: [Change Image](#)
Created: 03/30/2005 01:23 AM
Last Updated: 02/19/2009 05:17 PM
Status: Active

1 Profile → Visibility Services Configuration Assessments Maintenance

Provider Profile Standards Information Provider Access Provider Assessment

AIRS Official Update

Person Making Change: [George Yakcho](#) Person Requesting Change:
Organization Making Change: [Caddo Parish Coalition for the Homeless \(23\)](#) Organization Requesting Change: [\(Please Choose a Provider\)](#)
Updated: 10/11/2006 12:00 AM
[Provider Search](#) [Current Provider](#) [My Provider](#) [Clear](#)

Change Description:

Description: We provide transportation and shelter services.

HUD Compliant
AIRS Compliant
Uses ServicePoint
Operational

Figure 1-2

3. The initial provider screen will display. Click the **Visibility** tab to move into the **Visibility** area. **(1)** (See Figure 1-3)

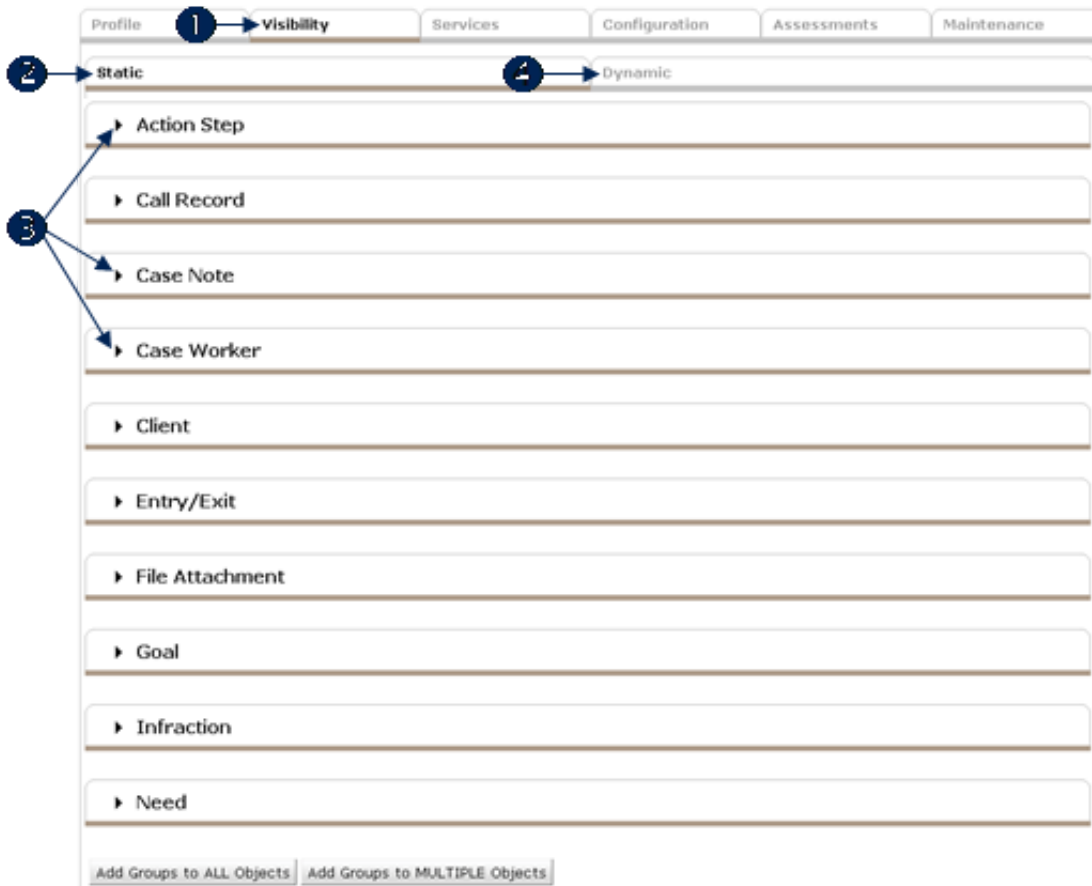


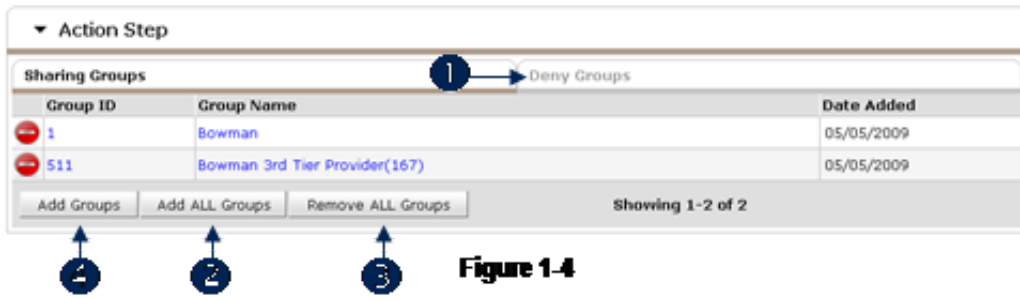
Figure 1-3

4. Notice that **Visibility (1)** and **Static (2)** are the active tabs. Within the **Static** tab a list of data objects that may be made visible to other providers is displayed. These include:
 - a: Action Step
 - b: Call Record
 - c: Case Note
 - d: Case Worker
 - e: Client
 - f: Entry/Exit
 - g: File Attachment
 - h: Goal
 - i: Infraction
 - j: Need

5. Click **Dynamic (4)** to display a list of assessments that may be made visible to other providers. The list of assessments will differ for every provider. The list will include assessments which have been added to the provider in the [Assessment Administration](#) area.

Note: *The functionality for making Static and Dynamic objects visible to other providers is identical. In this section static objects are referenced and screen shots display static items. This is simply a convenience and illustrates that all providers in every system have access to the same set of static objects. Dynamic objects differ from system-to-system and across providers.*

6. To expand an object click the arrow located next to the object. **(3)**
7. For example, click the arrow next to **Action Step**. (See Figure 1-4)



8. There are two sections for each object: **Sharing Groups** and **Deny Groups**. The **Sharing Groups** tab is active by default. To switch to **Deny Groups** for the object click the **Deny Groups** tab. **(1)**

Note: *The functionality associated with **Sharing Groups** and **Deny Groups** is identical. In this file the Action Step static object and the Sharing Group tab are used to illustrate the functionality.*

9. Click **Add ALL Groups** to add all active sharing groups to the object. **(2)** Once complete the screen will reformat to display all of the sharing groups now associated with the object.
10. Click **Remove ALL Groups** to remove all sharing groups assigned to the object. **(3)** Once complete the screen will reformat with no sharing groups displayed.
11. Click **Add Groups** to select the sharing groups to be assigned to the object. **(4)** (See Figure 1-5)



12. The **Manage Sharing Groups** screen will display when **Add Groups** is clicked. Use the **Group Search** to locate sharing groups to add to the object. Enter keywords in the **Search** field **(1)** and click **Search**. **(2)** (See Figure 1-6)

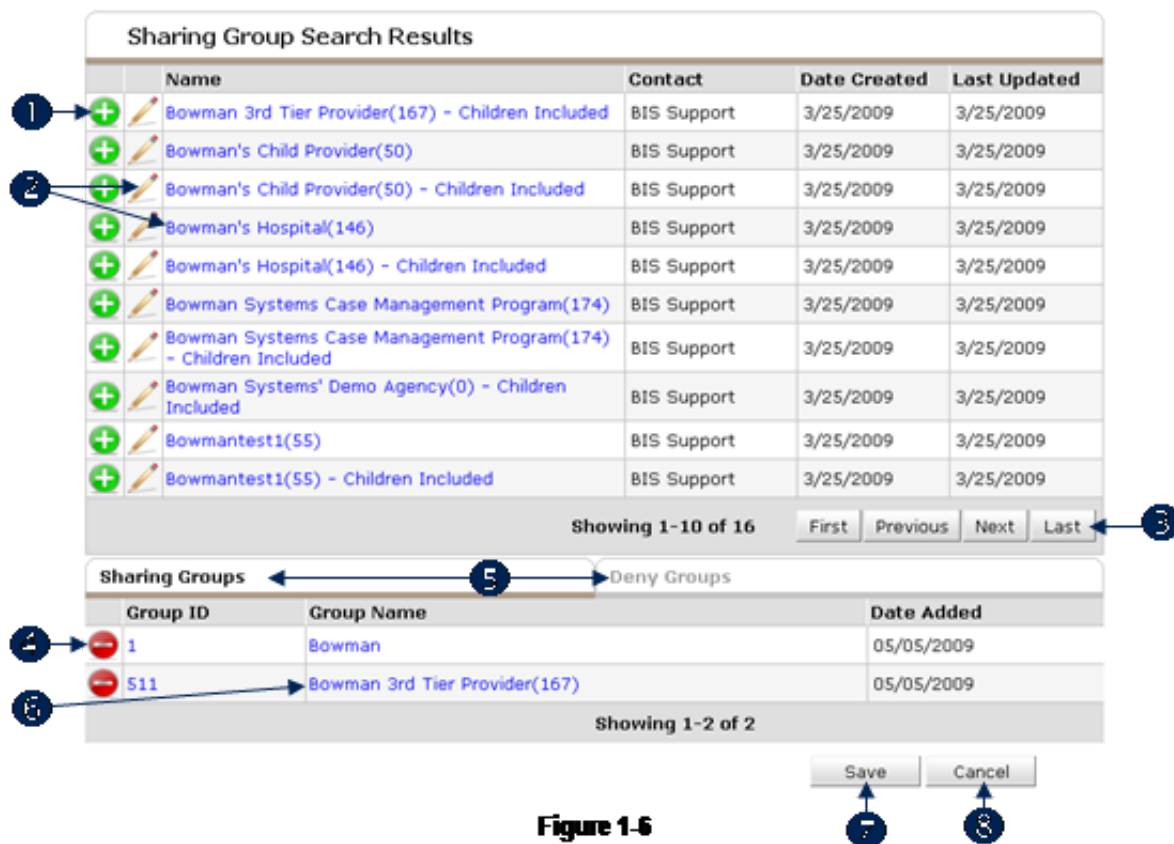





Figure 1-6

13. **Sharing Group Search Results** will display. The following functions are available.

- Click the **Green Plus** icon  to add a sharing group to the object. **(1)** The group will be added to the open tab, either **Sharing Groups** or **Deny Groups** (in this screen image **Sharing Groups** is the open tab). **(5)**
- Click the **Edit** icon  or the sharing group **Name** to access the **Sharing Group Profile** (this functionality is fully explained in the [Provider Groups](#) section of this file). **(2)**
- Use the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the search results. **(3)**
- Click the **Red Minus** icon  to remove a sharing group from the assigned **Sharing Groups**. **(4)**
This may be done in either the **Sharing Groups** or **Deny Groups** tab. **(5)**
- Click the **Group Name** of the assigned **Sharing Groups** to display a **Sharing Group Profile**. **(6)**
(See Figure 1-7)

Sharing Group Profile

Group Name *

Description

Sharing Group Type

Access Level

Contact Person

Name	Title	Telephone	E-mail
BIS Support			support@bowmansystems.com

Sharing Group Profile

Provider ID	Name	Date Added
115	First 5 Agency 2	06/14/2007

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Figure 1-7

f: Click **Save (7)** to retain the modifications or click **Cancel (8)** to return to the previous screen without retaining the changes.

14. The steps described above may be applied to **ALL Objects** or **MULTIPLE Objects**. (See Figure 1-8)



Figure 1-8

15. The buttons displayed in Figure 1-8 are located on the initial **Visibility** screen.

a: Click **Manage Groups for ALL Objects**.(See Figure 1-9)

Manage Groups for ALL Objects

Sharing Group Search

Search for Sharing Groups by using keywords from their Group name or description.

Search

Sharing Groups		Deny Groups
Group ID	Name	Date Added

Figure 1-9

◆ Note that **Sharing Groups** and **Deny Groups** are empty. **(1)** Search for and add groups to the **Sharing Groups** and **Deny Groups** area. Click **Save** to add the selected sharing

groups to all data objects. **(2)** Click **Cancel** to exit without adding the sharing groups to all data objects. **(3)**

b: Click **Manage Groups for MULTIPLE Objects**. (See Figure 1-10)

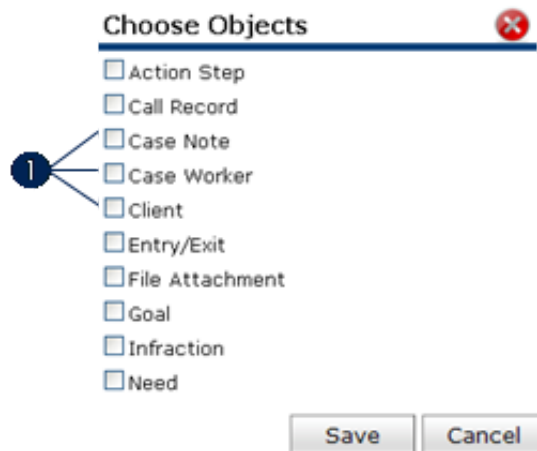


Figure 1-10

- ◆ Click the check boxes **(1)** to **Choose Objects** to which sharing groups will be assigned. Click **Save** to move to the **Sharing Group Search** screen. Click **Cancel** to return to the previous screen. (See Figure 1-11)

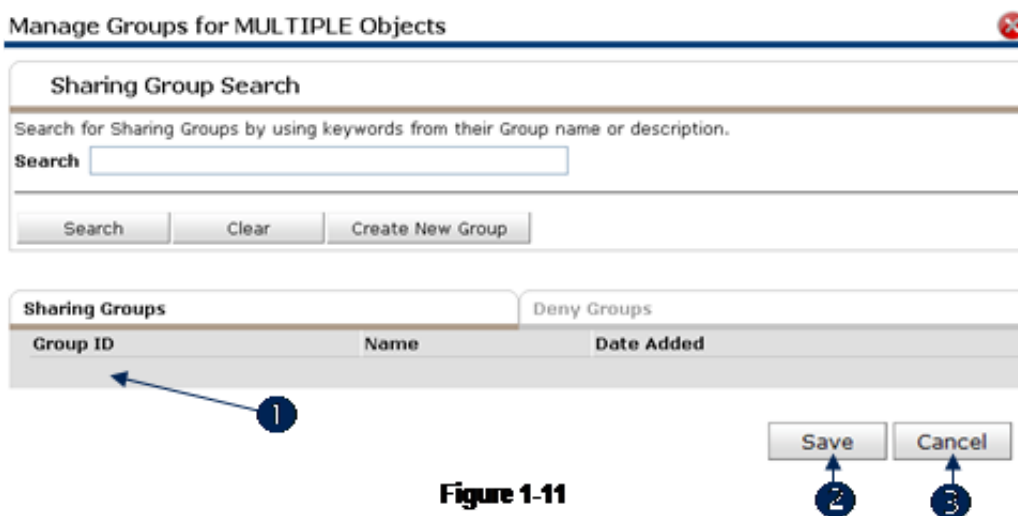


Figure 1-11

16. Note that **Sharing Groups** and **Deny Groups** are empty. **(1)** Search for and add groups to the **Sharing Groups** and **Deny Groups** area. Click **Save** to add the selected sharing groups to the previously selected data objects. **(2)** Click **Cancel** to exit without adding the sharing groups to the selected data objects. **(3)**