RULES FOR DATA SECURITY AND VISIBILITY

In summary there are six rules to remember (See Figure 1.4):

1. The user can always see data the parent provider has entered.
2. The user can always see their provider's data.
3. A System Administrator can always see subordinate provider's data.
4. System Administrators II can see every provider's data, even if that data is closed.

Keep in mind your Agency’s profile in ServicePoint is set up with the appropriate data security and visibility by default. You shouldn’t ever have to close a padlock because when you create a client your agency’s data security and visibility are already set up to protect the client’s data appropriately.