

## Frequently Asked Questions

# Intra-Agency Visibility

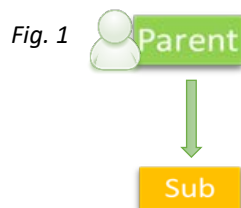
- When an agency enters their data, is it automatically visible to other providers within the agency's tree?

Not always. It depends on several factors:

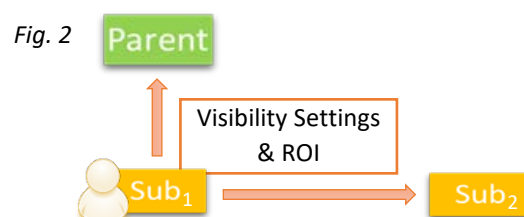
- **Data entry person's login provider or EDA provider** (if they EDA'ed prior to entering the data) and the **organization of the provider tree**: Data naturally flows down, so data entered at a parent provider is visible to all users at a sub-provider, no matter their user role.
- **Viewer's user role**: A few user roles, such as Agency Admins and Case Manager III's can bypass the normal visibility and see data entered below their provider in their tree. This is particularly important for users who run aggregate reports.
- **Visibility settings and ROI**: In the Provider Admin Settings, the visibility settings can allow data to be visible where it would not naturally be, between providers of the same level and upwards in an agency's tree. The data will only be visible if an ROI with consent from the provider sharing the data is in place.

- What are the "Golden Rules of Visibility"?

1. Data is always visible at the provider where it was entered.
2. Data flows down. Data entered at a higher-level provider is visible to all providers beneath (AKA child providers or sub-providers)
3. Data does not naturally flow up or sideways. "A child can hide from a parent, but a parent cannot hide from a child." Equivalent providers cannot naturally see each other's data. Changing the normal flow requires adjusting the visibility settings and adding an ROI.



*Data entered at the parent level is naturally visible to all users at the sub-provider.*



*Sharing data up to the parent or across to another sub-provider requires extra steps.*

- Which user roles can see all data in their tree and which have limited visibility?

- **Full visibility in their tree**: System Admin I, Agency Admin, Executive Director, Case Manager III, and Read Only II
- **Limited visibility**: Case Manager I and II, Read Only I and III, and almost all other roles

For full details, refer to the User Role Table in the ServicePoint Help page or contact your admin.

### ➤ How does the tree structure affect visibility?

The organization of the provider tree significantly impacts intra-agency visibility. An effective tree structure optimizes the natural flow of data to match the organization's visibility needs. Not only does this reduce the need for extra adjustments by admins or users, but it also makes it easier to avoid human error and data issues that can hamper reporting.

Fig. 3 and 4 are examples of two different tree structures. Anything entered at the parent provider will be visible to all levels below. Data entered at a sub-provider or a sub of a sub will require appropriate visibility settings and an ROI to share upwards or across. Sharing data up and across to multiple providers above the level of where the data was entered has the most challenges.

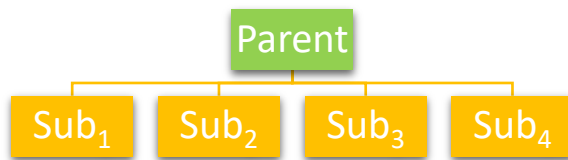


Fig. 3 Horizontal Tree

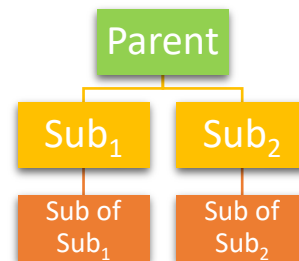


Fig. 4 Vertical tree

### ➤ What happens when a user uses Enter Data As (EDA)?

The EDA function allows a user to “change their hat” to a different provider, temporarily changing where the user sits in the tree. All settings at the EDA provider will govern the user's view and the visibility of data entered. EDA can allow a user to see client records and data that are not visible at their login provider. Data entered while EDAing can hide from the user when they return to their login provider if the EDA provider's visibility settings are not set to share or the EDA provider does not have an ROI with consent.

### ➤ What data elements might a user at the parent provider enter for a sub-provider and vice versa? What happens to the visibility?

The user must have EDA rights to the other provider in order to be able to select it. Without using EDA, a user at the parent provider can input entry/exits, ROIs, service transactions, and needs on behalf of a sub-provider. All data entered at the parent is visible to the sub, even without an ROI.

Although it is uncommon in regular workflows, a user at a sub-provider can also input entry/exits, ROIs, service transactions, and needs on behalf of the parent provider. The assessment data inside the entry/exit and most other elements, including needs and services, will be tied to the sub-provider and will therefore require an ROI with consent to share upwards. The parent provider will be able to see the static elements of an entry/exit into their provider without an ROI in place.