



ServicePoint Visibility Configuration Exercise

The purpose of this exercise is to demonstrate your knowledge of provider and client visibility by creating an agency visibility group; applying the agency visibility group, CoC visibility group, and funder visibility group to the appropriate provider visibility objects. For a successful outcome, you should be able to create a client record while Entering Data As the provider for which you configured visibility, and verify through the padlock tools that visibility settings were correctly configured.

Be sure you are using the Training Site to complete this exercise: <https://minnesota.servicept.com/training>. If you need help with a login, please contact the HMIS Helpdesk at hmis@wilder.org. Refer to the ServicePoint Visibility Configuration Instructions below, the training video, or the training PowerPoint presentation as needed. When you are finished, email the Helpdesk with the client ID you created for step 3 and an HMIS rep will review the exercise and contact you with feedback and answer any further questions you may have about this topic.

For this exercise, you may use Ramsey Visibility Test Agency(3930) and its subordinate providers (3931, 3932, 3933, 3934); or Hennepin Visibility Test Agency(3935) and its subordinate providers (3936, 3937, 3938, 3939). Include your name in the group name to distinguish it from other groups (e.g. Bob's Test Agency Visibility Group).

1. Create an Agency Visibility Group that includes one of the Visibility Test Agency providers and its subordinate providers.
2. Apply appropriate visibility groups to one of the Visibility Test Agency subordinate providers using the table on Page 2 for guidance. If the provider you choose is already fully configured, choose another.
 - a. Apply the **Agency Visibility Group** you just created to all Static and Dynamic objects
 - b. Apply the appropriate **CoC Visibility Group** to applicable Static and Dynamic objects
 - Hennepin CoC Visibility Group or Ramsey CoC Visibility Group (depending on which tree you chose)
 - This will share selected data objects with the CoC Provider (not all providers in the CoC)
 - c. Apply the appropriate **Funder Visibility Group** to applicable Static and Dynamic objects
 - Choose from **DHS OEO THP Visibility Group**, **Minnesota Housing LTH Visibility Group**, **FHPAP Hennepin** or **FHPAP Ramsey**.
 - HUD CoC programs do not have a funder visibility group. You do not need to apply a Funder Visibility Group for HUD providers.
3. Create a test client record to verify the visibility groups are correctly applied
 - a. Enter Data As the provider you configured visibility for.
 - b. Create a new test client record in Client Point and complete the applicable data entry steps for the provider you selected, including creating and Entry/Exit record and/or Service Transaction using fake data. If you need a reminder of the appropriate data entry steps, use the funder-specific Reference Guides on our website: <http://hmismn.org/forms-and-instructions/>
 - c. Click the padlocks on the various data objects to verify the visibility groups applied in the Provider Admin Visibility settings
 - The Client Record padlock is on the top right of the client page
 - The Client Demographics and Universal Profile Assessment padlocks are in the Client Profile tab
 - The Entry/Exit and assigned assessment padlocks are in the Edit Entry pop-up
 - Service Transaction padlocks are attached to each Need under the Service Transactions tab
 - Individual assessment padlocks can be found in the Assessments tab



Additional instructions for Step 2

The table below breaks down the different visibility groups that need to be applied to the static and dynamic objects. Use the codes below to match the funder project to the object type.

x = apply to all providers

x (THP) = apply to all THP providers

x (LTH) = apply to all LTH providers

x (FHPAP) = apply to all FHPAP providers

x (HUD) = apply to all HUD providers

Static Objects	Agency Visibility Group	CoC Visibility Group	Funder Visibility Group
Action Step	x		
Activity Enrollment	x		
Call Record	x		
Case Manager	x		
Case Note	x		
Client	x	x	x
Client Demographics	x	x	x
Client Note	x		
Entry/Exit	x	x	x
File Attachment	x		
Goal	x	x (THP)	x (THP)
Incident	x		
Measurement Tools Data	x	x (LTH)	x (LTH)
Medicaid Pre-Authorization Code	x		
Need	x	x (FHPAP)	x (FHPAP)

Dynamic Objects	Agency Visibility Group	CoC Visibility Group	Funder Visibility Group
Exit FHPAP	x	x (FHPAP)	x (FHPAP)
Exit HUD	x	x (HUD)	
Exit LTH	x	x (LTH)	x (LTH)
Exit THP	x	x (THP)	x (THP)
Household Data Sharing	x	x	x
HUD All-Inclusive	x	x (HUD)	
Minnesota Universal	x		
MN: Ending LTH All-Inclusive	x	x (LTH)	x (LTH)
MN: FHPAP All-Inclusive	x	x (FHPAP)	x (FHPAP)
MN: THP All-Inclusive	x	x (THP)	x (THP)
Notes about client	x		
Universal profile	x	x	x
VI-SPDAT 2.0	x		



ServicePoint Visibility Configuration Instructions

How to create a visibility group

1. Navigate to the Admin Tab
2. Click on the Provider Groups button
3. Click Create New Group
4. Create a name for the group following the Provider Group Naming Convention
 - a. Write a description that includes the purpose of the group
 - b. The Visibility Group Type should be Public
5. Save to move on to select the providers which should be added to the group
6. Click "Manage Providers" to add providers
7. Search for providers to add either by Name or Provider ID
8. Click the green plus sign to add providers
 - a. You may also select "Add this provider and its subordinates"
9. Once all providers have been added to "Group Providers", click Exit to save

How to apply visibility to a provider

1. Navigate to the Admin Tab
2. Click on the Provider Admin button
3. Search for and select the provider who is creating the data you want to apply visibility to share (or deny sharing from)
4. Click on the Visibility Tab
5. Configure Visibility for Static objects or Dynamic objects by clicking on the appropriate tab. Visibility can be applied individually for each object separately, or visibility groups can be applied to multiple objects at the same time.
 - a. To configure each object separately
 - i. Click either the Visibility Groups or Deny Groups Tab
 - ii. Click the arrow next to the object you want to share with the provider or visibility group
 - iii. Click Add Groups
 - You can also remove all visibility groups or deny groups previously applied.
 - This will not remove data already shared. It will only prevent data from being shared moving forward
 - iv. Search for the provider or visibility group to which data should be shared
 - To add deny groups, click on Deny Groups tab instead
 - Deny groups are used to deny visibility to specific visibility groups or providers and override visibility group settings.
 - v. Click the green plus to add the provider or group
 - vi. Repeat the last two steps until all providers or visibility groups have been added
 - vii. Click Exit to complete
 - b. To configure for several objects to share with the same providers or visibility groups at once
 - i. Scroll to the bottom on the page and click "Add Groups to Multiple Objects"
 - ii. Click the check box next to the objects you want to share with the providers or visibility group
 - iii. Click Save



- iv. Search for the provider or visibility group to which data should be shared
 - To add deny groups, click on Deny Groups tab instead
- v. Click the green plus to add the provider or group
- vi. Repeat the last two steps until all providers or visibility groups have been added
- vii. Click Save to complete

How to apply visibility using Client Visibility settings

1. Open a client record
2. Navigate to the part of the client record for which you want to view visibility settings.
3. Click on the lock box next to the section for you want to configure visibility
4. To apply Visibility
 - a. Click "Add Visibility Group"
 - b. Search for the name of a provider or visibility group
 - c. Click the green plus to add that provider or visibility group
 - Be careful to choose the right provider or group. Some groups say "and children included". Selecting this will apply visibility to that provider and all providers below it on the tree.
 - You can click on the blue text to see which providers are included in a group
 - d. Click "Save" when complete
5. To add Deny Groups
 - a. Click on the Deny Group Tab
 - b. Click "Add Deny Group"
 - c. Search for the name of a provider or visibility group
 - d. Click the green plus to add that provider or visibility group
 - Be careful to choose the right provider or group. Some groups say "and children included". Selecting this will deny visibility to that provider and all providers below it on the tree.
 - You can click on the blue text to see which providers are included in a group
 - e. Click "Save" when complete

How to check to see which data is being shared

1. Use the padlocks on a client's record to see which data is being shared with which providers
 - a. Open a client record
 - b. Navigate to the part of the client record for which you want to view visibility settings.
 - c. Click on the lock box next to the section you want to view
 - To check a particular question, click on the colored bar to locate the lockbox
 - d. The providers or visibility groups listed in the Visibility Group section have visibility to that data
 - e. Providers or visibility groups listed in the Deny Group are exceptions to the configuration in the Visibility Group section. Any provider or visibility group listed in the Deny Group section will not have visibility to the selected data.