



SHARING A CLIENT RECORD/ REQUESTING AND ACCEPTING A SHARE

It is often quickest to request a share by contacting CCP, see the last section below.

NB When you receive a client share, you must complete a new Registration Wizard – this will ensure:-

- The **client’s details are up to date** and reflect their situation at time of engagement.
- The client is associated with your **Programme(s)**.
- The client has a **Started on Programme** activity for your programme(s) with the correct date.

SHARING A CLIENT RECORD WITH ANOTHER PROVIDER



- Find the Client Record in Helix, either in **Client/Find Client** or via **Quick Jump List**
- Select **Action/Share**
- Click on **Add**
- Select **Organisation, Division** and **Site**
Share With Another Site

Organisation:	CCP	<input type="checkbox"/> Share to all divisions in organisation
Division:	Joined up for Business	<input type="checkbox"/> Share to all sites in division
Site:	Event Registrations	
Editable:	<input type="checkbox"/>	

- **Organisation** is the top level in the Helix Site Structure – this will usually be either a Local Authority Area or a service provider which covers multiple Local Authority areas, eg East Lothian, Midlothian, Access to Industry. If you wish to share the client record with all Divisions under an Organisation, check ‘**Share to all divisions in organisation**’.
- **Division** is the next level down – usually a Local Authority or a Provider area. If you wish to share the client the client record with all Sites under a Division, check ‘**Share to all sites in division**’.
- **Site** is the lowest level in the site structure and refers to a specific site in Helix. This will usually be a provider at a particular site, a local authority site or a specific funding stream for a provider, eg **Barnardo’s – Midlothian IFS, C1st – Edinburgh, Into Work – Midlothian**.
- If you want the provider to have Edit-access to the client record, make sure you **tick the Editable checkbox**.
- Click on **Save**.

REQUESTING A SHARE WITHIN HELIX

You can request a share within Helix, from whoever is set as the client's Main Caseload, however It is often quicker to email CCP (see below).

Requesting a Client Share within Helix:-

- Find the Client Record in Helix in [Client/Find Client](#)
- [If you do not have access to the client record](#), it will look like this:-

Reference	Forename	Surname
Squ90450	Secret	Squirrel

- [Click on the Client Reference](#), you'll see a screen like this:-
Client Not Viewable

You do not have access to view this client record

You do not have access to view this client record

Client Ref:	Squ90450
Client Name:	Secret Squirrel
Site:	Admin
Caseload:	Chris Nicol - AMUFT
Caseload Phone:	X
Caseload Email:	Chris.Nicol@capitalcitypartnership.org

[Request Share](#) [Request Referral](#)

- [Click on Request Share](#), you'll then see a form like this:-

Share Request

Please complete the form below to request a share to your site

Subject *

Client Share Request (Squ90450)

Details *

Please share Secret Squirrel (Squ90450) to site Acme

[Send Share Request](#)

- You can edit the [Subject](#) and/or [Details](#), then click on [Send Share Request](#).
- The [recipient's email](#) will look like this:-

Client Share Request (Squ90450)

 Hanlon Client <skillsregister@hanlons.co.uk>
To  Gordon Kilgour

 [Reply](#) [Reply All](#) [Forward](#)

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi,

A share request has been made by a client of which you are listed as the caseload.

Client Secret Squirrel (Squ90450) has requested to be shared to site Acme at 19/06/2024 15:56.

This was made with the following message: Please share Secret Squirrel (Squ90450) to site Acme

This email was generated automatically, please do not reply.

Which they can then action from their [Alerts](#) (see below).

- When the share is approved, [remember to complete a Registration Wizard](#).

ACCEPTING A SHARE REQUEST FROM ANOTHER PROVIDER

When another provider requests a Client Share from you, you will receive an email notification, which looks like this:-

Client Share Request (Squ90450)



Hanlon Client <skillsregister@hanlons.co.uk>
To Gordon Kilgour

☺ Reply Reply All → Forward

Wed 19/06/2024 15:56

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi,

A share request has been made by a client of which you are listed as the caseload.

Client Secret Squirrel (Squ90450) has requested to be shared to site Acme at 19/06/2024 15:56.

This was made with the following message: Please share Secret Squirrel (Squ90450) to site Acme

This email was generated automatically, please do not reply.

To action the Share Request:-

- Go to [Alerts](#)
- Click on the [Messages](#) tab.
- The [Share Request](#) will appear like this:-

Date	Message	Detail	From	Action
19/06/2024	Client Share Request (Squ90450)	Please share Secret Squirrel (Squ90450) to site Acme	Gordon Kilgour - ACME	Take Action

- Click on [Take Action](#)
- You will see a page like this:-
Share Request

Action share request

Details

Client:	Secret Squirrel (Squ90450)
Requester User:	Gordon Kilgour - Acme Training
Requester User Site:	Acme
Requester Caseload:	Gordon Kilgour - ACME
Requester Phone Number:	X
Requester Email:	gordon.kilgour@capitalcitypartnership.org
Requestee Caseload:	Gordon Kilgour - ACME
Requestee Phone Number:	X
Requestee Email:	gordon.kilgour@capitalcitypartnership.org

Message

Subject:	Client Share Request (Squ90450)
Message:	Please share Secret Squirrel (Squ90450) to site Acme

Accept Reject Revoke Cancel

- Click on [Accept](#) or [Reject](#).

ASK CCP FOR A SHARE

Sometimes the client's Main Caseload may not login to Helix regularly, may not have been updated, or the contact set as Main Caseload may have left the organisation. For these reasons it is often quicker to email [Gordon](#) or [Chris](#) at CCP to request a share – please provide the [Client Reference\(s\)](#).

NB Remember you will have to complete a [Registration Wizard](#) for the shared client to ensure [their details are recorded correctly](#) and that they are associated with your [Programme\(s\)](#).