



# Module 6

Sharing client records

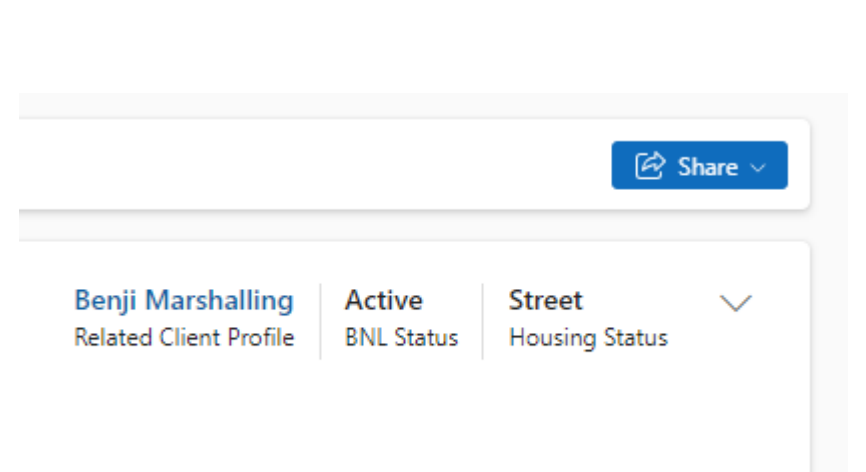
## Module 6

# How record sharing works

Record sharing works by creating a secure link to a client record, which you can then share with others.

The recipient will be able to access the record quickly, and no personal or sensitive information is exported out of the BNL.

This is a good option when looking to share time critical updates, when doing a warm referral, or managing workflow internally.

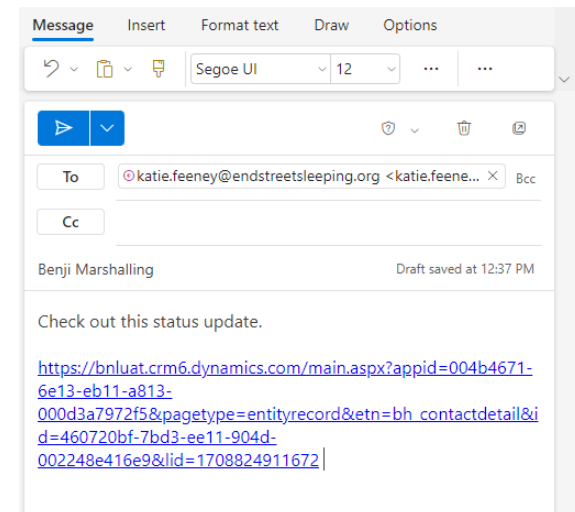
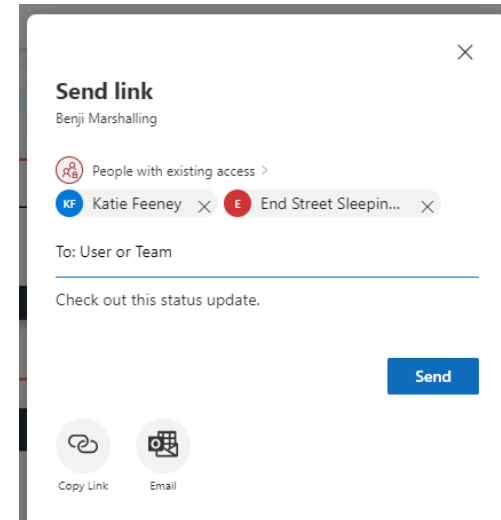


## Module 6

# Using the share button

To share a record, press the share button in the top right corner of the client record.

1. Select which sharing option you prefer (link or email).
2. For a link, simply copy the link and use as normal.
3. For email, select which user(s) you would like to email the link to. This can be either users of the system or a whole team (this will go to the generic team email).
4. Write a message providing explaining the share request.
5. Press send. This will open a prepopulated email in outlook.



## Module 6

### Exercise

*A person you've supported for the past six months is coming to the end of their support period. You've done a great job establishing a strong support network and want to pass on lead worker responsibilities to their new case manager through a transparent, warm referral.*

**Exercise:** Buddy up and practice sharing a client record with each other. What would you include in the email text to make the referral warm, without disclosing confidential information over an email?





**Thank you**

We're here if you need us!  
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