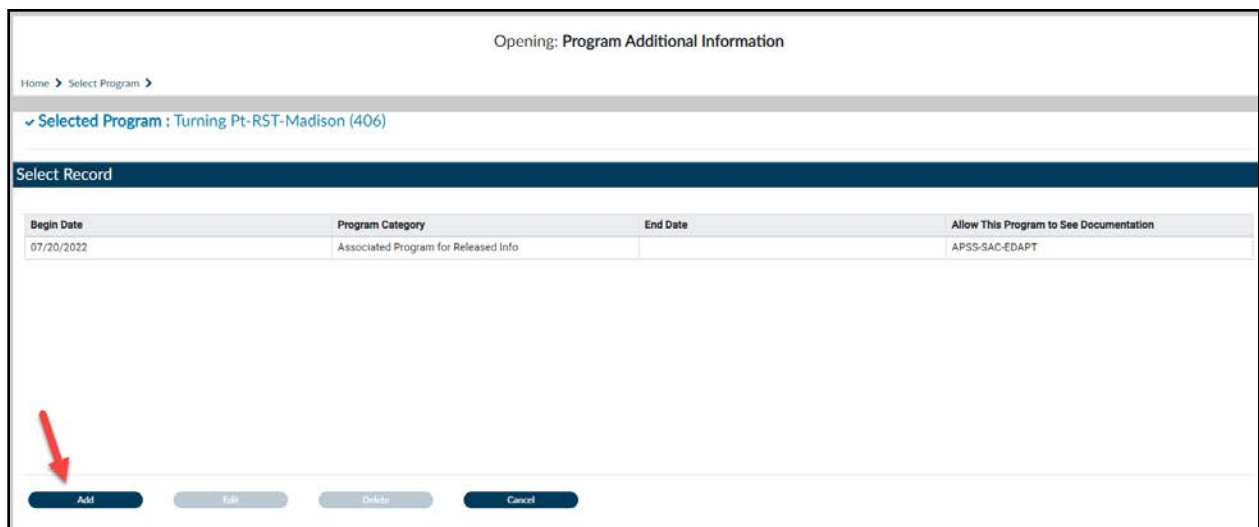# Documentation for Shared Clients Tip Sheet

This form is used for the sharing of Progress Notes and Mobile Assessments from one program to another. You will be able to view a report of the information that is selected. ECM Providers will be able to view Outpatient documentation by using this form and vice versa. The client must already be admitted into the ECM episode prior to launching the **Documentation for Shared Clients** form.

From the "**What can I help you find?**" Search box type in **"Documentation for Shared Clients"**
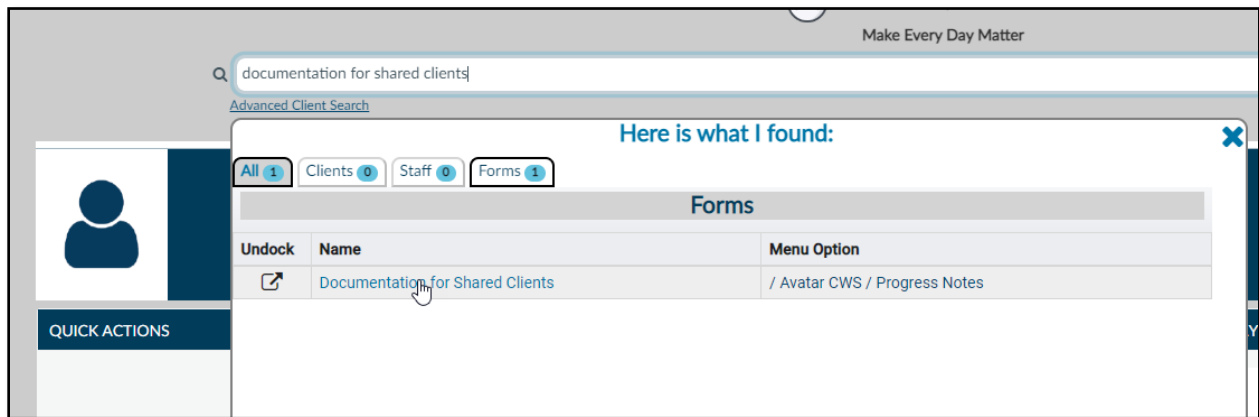
If there is already a saved record you will come to a pre-display and from there you will select "Add". If there are no previous records, you will go directly into the form.

Once in the form you will need to select all of the options to narrow the search results.

1. Enter the Shared Client by searching via name, Avatar ID, Date of birth, etc
2. Select the open ECM episode.
3. Select your ECM program.
4. Click on the boxes next to the episodes you would like to view documentation from. All ECM episodes will have ECM in the beginning.
5. Enter the start date for timeframe you are searching for
6. Enter the date you would like to end the search.
7. Select whether you would like to see notes in Draft Status, Final Status or both.
8. Here you can select which note type(s) you would like to view. To select all note types, click the "All" button. All note types will then be selected.
9. Enter the name of a specific staff member, if you leave this field blank it will search for all staff.
10. Hit the "space bar" then the "enter" keys on your keyboard to search for all Progress Notes/Mobile assessments. You can also enter a specific word or key phrase to search for.

Once you've selected the notes you want to view, click "Process". This will open all selected notes in a separate window.