# COVID-19 Community Team Outreach Tool

# Sharing Records with Outside Orgs

**CCTO users who do not work for NC DHHS or LHDs are assigned a special outside organization security level that only allows them to see records that are owned by a member of their team or that are *shared* with them through a special functionality.** Sharing records allows members of outside organizations to have select permissions (viewing, editing, re-sharing, assigning, and/or deleting) for certain records. See below for the process.

## How to Share a CCTO Monitoring Event

**To share CCTO records with all the CCTO users who are associated with a particular outside organization:**

1. Begin within the Monitoring Events Tab and select a view that allows you to see the records you wish to share.

2. Select the record(s) using the checkmarks and click **Share.**

3. In the search bar under **Add User/Team,** type in the name of the outside organization team or user with whom you wish to share the record(s). Once it has been selected, it will appear under **Manage share access** on the left-hand side.

4. Select the name(s) of the outside organization team or user with the checkmark and then choose access privileges as appropriate by selecting with the checkmarks.

5. Click **Share.** Your selected records will become accessible to the members of the outside organization per the access permissions that you have selected. *Note that sharing does **not** reassign records, and they will remain visible to you; however, sharing may permit others to assign the record if you give them this access privilege.*



Select record(s) to share

Select Outside Organization(s)

Choose access privileges

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## Sharing Other Types of Records – 

**Note that People and Household records will also need to be shared manually to any county that is not in the list of counties with which records can automatically be shared;** however, activities and assessments do not need to be shared separately. When a monitoring event is shared, the assessments and activities associated with the monitoring event will also be viewable.

*NOTE: There is a special automatic sharing process that also occurs in certain circumstances for outside organizations that are part of K-12 schools and have been approved by LHDs. When applicable, these schools will have relevant records automatically shared with them.*

## Changing the Default Number of Records Shown – 

As a default, you will be shown 50 records on each page in a view in CCTO. To help make it easier to run your selections when you are choosing records to be shared, you can adjust the number of records shown on each page. **To adjust your default settings in order to view more than 50 records on each page:**

1.  Begin by clicking on the settings gear in the top right of your screen.

2.  Then, click on **Personalization Settings**. This will open a window to adjust your personal options.

3.  In the *General* tab, the second header reads **Set the number of records shown per page in any list of records.** Use the dropdown to adjust the number of records you see on each page from 50 to 25, 75, 100, or 250.

4.  Once you have selected your preference, click **OK**. Your preference has been saved and will be your new default on any page.