FSP Portal Update
Sharing Applications

Key Portal Information For Practitioners in the Bayside Peninsula Region October 21, 2021

Why share an application?

Sharing applications is the fundatmental tool to create teams aligned to your organisation's structure and manage potential conflict of interest. Sharing ensures applications and supporting attachments are reviewd and submitted by a senior member of the organisation.

Most users have limited portal acess - **limited to the application/s they create, share and or submitt**.

Example:

A Case Manager shares their application with their team leader. Team Leader reviews and submits the application. Both Case Manager and Team Leader have visibility of this application. The Team Leader then shares the same application with another team leader - both have visibility of this application, and so on.

How do I know when to share an application?

- If the system does not allow you to submit an application you are not authorised to do so. This is your prompt to share the application.

How do I share my application?

- My submission – Use List view to see your applications
- Click on the application you want to share
- Click on the three blue horizontal bars to the right of the screen, next to ***In Progress***
- Select Share
- Locate the name of the person you want to share the application with
- Drag their name into the "Share Application to these users" field (You can share with multiple people)
- Add a message to the recipient
- Schedule a date the share expires
- Click on Share

What if I am asked to share my application with another person at a later date?

- You can go and share an application by following the above mentioned steps

Are there other implications of sharing?

- The senior practitioner who submits the application also submits all supporting documentation including variations and tax invoices
- The senior practitioner has visibility of each stage of an application and will know when to action items by referring to its status