



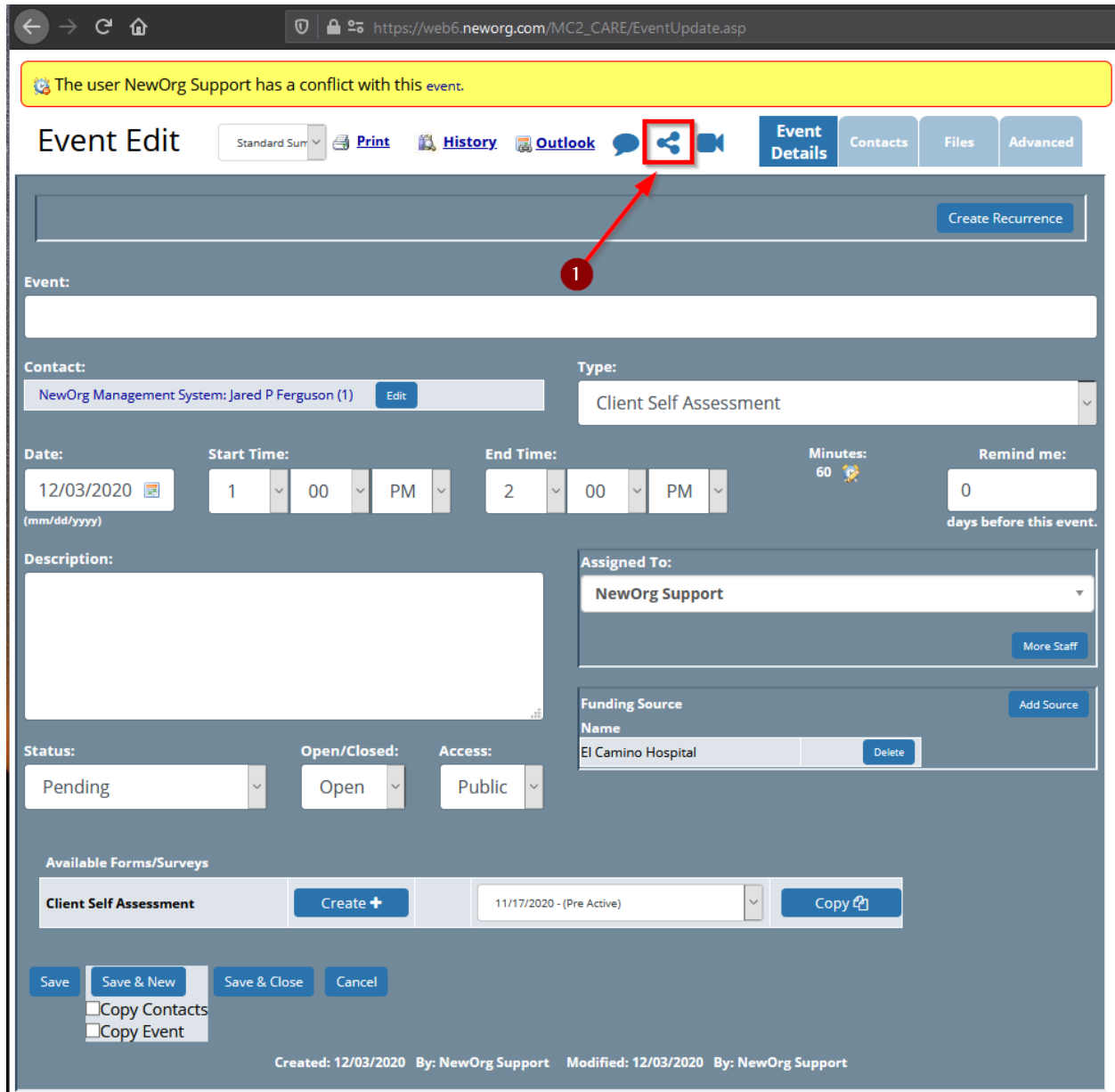
File Sharing & Document Center User Manual

Contents

Accessing The File Sharing Display.....	2
Determining Which Surveys/Forms/Print Forms Are Available	4
Sharing A Survey/Form	5
Sharing A Print Form	9
Prompting the Contact To Upload a File.....	11
Sharing Company Files	13
Recipient View and Actions	14
Viewing Previously Shared Files.....	23
Viewing Expired Files	24
Resharing a Previously Saved File	25
Copying The Link For a Previously Shared File.....	26
Specifying Your Alert Settings and Alert Notification Method	27

Accessing The File Sharing Display

Note: From any event, after you click 'Save', the 'File Share' icon at the top of the event will display.



The screenshot shows the 'Event Edit' page in a web browser. At the top, a yellow banner displays a conflict message: 'The user NewOrg Support has a conflict with this event.' Below this, the page title is 'Event Edit'. A navigation bar contains several icons: 'Standard Sum', 'Print', 'History', 'Outlook', a 'File Share' icon (highlighted with a red box and a red arrow labeled '1'), and a video camera icon. To the right of these icons are buttons for 'Event Details', 'Contacts', 'Files', and 'Advanced'. The main form area includes a 'Create Recurrence' button, an 'Event:' text input field, a 'Contact:' dropdown menu (set to 'NewOrg Management System: Jared P Ferguson (1)'), and a 'Type:' dropdown menu (set to 'Client Self Assessment'). Below these are fields for 'Date' (12/03/2020), 'Start Time' (1:00 PM), 'End Time' (2:00 PM), 'Minutes' (60), and 'Remind me' (0 days before this event). The 'Description:' field is empty. To the right, there is an 'Assigned To:' dropdown menu (set to 'NewOrg Support') and a 'Funding Source' dropdown menu (set to 'El Camino Hospital'). At the bottom, there are buttons for 'Save', 'Save & New', 'Save & Close', and 'Cancel', along with checkboxes for 'Copy Contacts' and 'Copy Event'. The footer shows 'Created: 12/03/2020 By: NewOrg Support Modified: 12/03/2020 By: NewOrg Support'.

1) Click the 'File Share' icon

12/4/20

Note: This will then navigate you to the File Share Display

The screenshot displays a web application interface for a 'Client Self Assessment'. At the top right is the 'NewOrg Management System' logo. The main header includes the title 'Client Self Assessment:', the date 'Date: 12/03/2020', and the time 'Time: 1:00 PM-2:00 PM'. A red circle with the number '1' and an arrow points to the 'Contacts' section.

Contacts

Jared Ferguson
Email: jferguson@neworg.com
Home Phone: 814-312-2575
Work Phone: 814-312-2575
Cell Phone: 814-312-2575

Shared Files
No shared files

Expired

- File Upload Requested
Shared until: Dec 3 2020 7:14PM by: NewOrg Support
- Client Self Assessment
Shared until: Dec 3 2020 6:22PM by: NewOrg Support
- Authorization To Disclose Conf Info
Shared until: Dec 3 2020 6:37PM by: NewOrg Support

Files Refresh

Print Forms

- Authorization To Disclose Conf Info (Contact)
- Client Information Form (Contact)
- Message Therapy Form (Contact)
- Request For Notification (Contact)

Forms/Surveys

- Client Self Assessment

Saved Print Forms

- Request For Notification
Jared Ferguson (Contact)
(11/13/2020 4:30:28 PM)
- Authorization To Disclose Conf Info
Jared Ferguson (Contact)
(12/3/2020 5:06:11 PM)

Saved Forms/Surveys

- Client Self Assessment
NewOrg Management System: Jared P Ferguson
(12/3/2020 4:14:34 PM)
- Client Self Assessment
NewOrg Management System: Jared P Ferguson
(12/3/2020 4:34:26 PM)

Saved Files

- Test File Upload Document.docx
Jared Ferguson

[Prompt Contact to Upload Files](#)

Determining Which Surveys/Forms/Print Forms Are Available

Note: Depending on the 'Event Type' selected will determine which 'Surveys/Forms' are available.

The 'Event Type' will determine which 'Print Forms' are available as well (Forms available in the 'Standard Summary' dropdown of the 'Event'.).

Related to Print Forms, depending on the 'Contact Group' the contact is in, will also determine which 'Print Forms' are available for sharing.

The screenshot displays the NewOrg Management System interface for a 'Client Self Assessment' event. The event details include the date (12/03/2020) and time (1:00 PM-2:00 PM). The 'Contacts' section lists Jared Ferguson with his email, home phone, work phone, and cell phone. The 'Shared Files' section shows two files: 'Client Self Assessment' and 'Authorization To Disclose Conf Info', both shared until Dec 3, 2020, 6:25 PM. The 'Expired' section indicates no expired files. The 'Files' section is highlighted with a red box and contains two sub-sections: 'Print Forms' and 'Forms/Surveys'. The 'Print Forms' list includes 'Authorization To Disclose Conf Info (Contact)', 'Client Information Form (Contact)', 'Message Therapy Form (Contact)', and 'Request For Notification (Contact)'. The 'Forms/Surveys' list includes 'Client Self Assessment'. The 'Saved Print Forms' section shows a 'Request For Notification' form shared by Jared Ferguson on 11/13/2020 at 4:20:28 PM. The 'Saved Forms/Surveys' section shows the 'Client Self Assessment' form shared by Jared P. Ferguson on 12/3/2020 at 4:14:34 PM. The 'Saved Files' section indicates no files. The 'Company Files' section indicates no company files.

Sharing A Survey/Form

The screenshot displays the NewOrg Management System interface for a 'Client Self Assessment' event. The event details include the date (12/03/2020) and time (1:00 PM-2:00 PM). The contact information for Jared Ferguson is shown, including email and phone numbers. The 'Files' section is divided into several categories: Print Forms, Saved Print Forms, Saved Forms/Surveys, and Saved Files. A 'Refresh' button is located in the top right of the Files section. Red annotations highlight specific features: 1) The contact details for Jared Ferguson, 2) The file sharing options (Show Files Shared on This Event, Show All Shared Files), and 3) The file share icons next to items in the 'Files' section.

- 1) The Contact Details will be displayed below the name of the contact in the event.
- 2) You can view historical 'Files Shared on this Event' or 'Show All Shared Files'.
- 3) To Share a file, click the 'File Share' icon next to the file name. Be it a 'Survey/Form' or 'Print Form'.

Note: If there is more than once contact in the 'Event', each contact details will be displayed.

The screenshot displays a web application interface for a 'Client Self Assessment' event. At the top, the event title 'Client Self Assessment' is shown with the date '12/03/2020' and time '1:00 PM-2:00 PM'. The 'NewOrg Management System' logo is in the top right. A 'Show Files Shared on This Event' dropdown is visible. The 'Contacts' section lists two individuals: Jared Ferguson and Nick Rowan Test. Each contact has a 'Shared Files' and 'Expired' sub-section. Jared Ferguson's 'Expired' section lists three items: 'File Upload Requested', 'Client Self Assessment', and 'Authorization To Disclose Conf Info'. The 'Files' section at the bottom is organized into 'Print Forms', 'Saved Print Forms', and 'Forms/Surveys' categories, each with a list of documents and a refresh button.

Client Self Assessment:
Date: 12/03/2020
Time: 1:00 PM-2:00 PM

Contacts

Jared Ferguson
Email: jferguson@neworg.com
Home Phone: 814-312-2575
Work Phone: 814-312-2575
Cell Phone: 814-312-2575

Shared Files
No shared files

Expired
File Upload Requested
Shared until: Dec 3 2020 7:14PM by: NewOrg Support
Client Self Assessment
Shared until: Dec 3 2020 6:22PM by: NewOrg Support
Authorization To Disclose Conf Info
Shared until: Dec 3 2020 6:37PM by: NewOrg Support

Nick Rowan Test
Email: jaredpaufferguson1989@gmail.com
Home Phone:
Work Phone:
Cell Phone:

Shared Files
No shared files

Expired
No expired files

Files Refresh

Print Forms
Authorization To Disclose Conf Info (Contact)
Client Information Form (Contact)
Message Therapy Form (Contact)
Request For Notification (Contact)

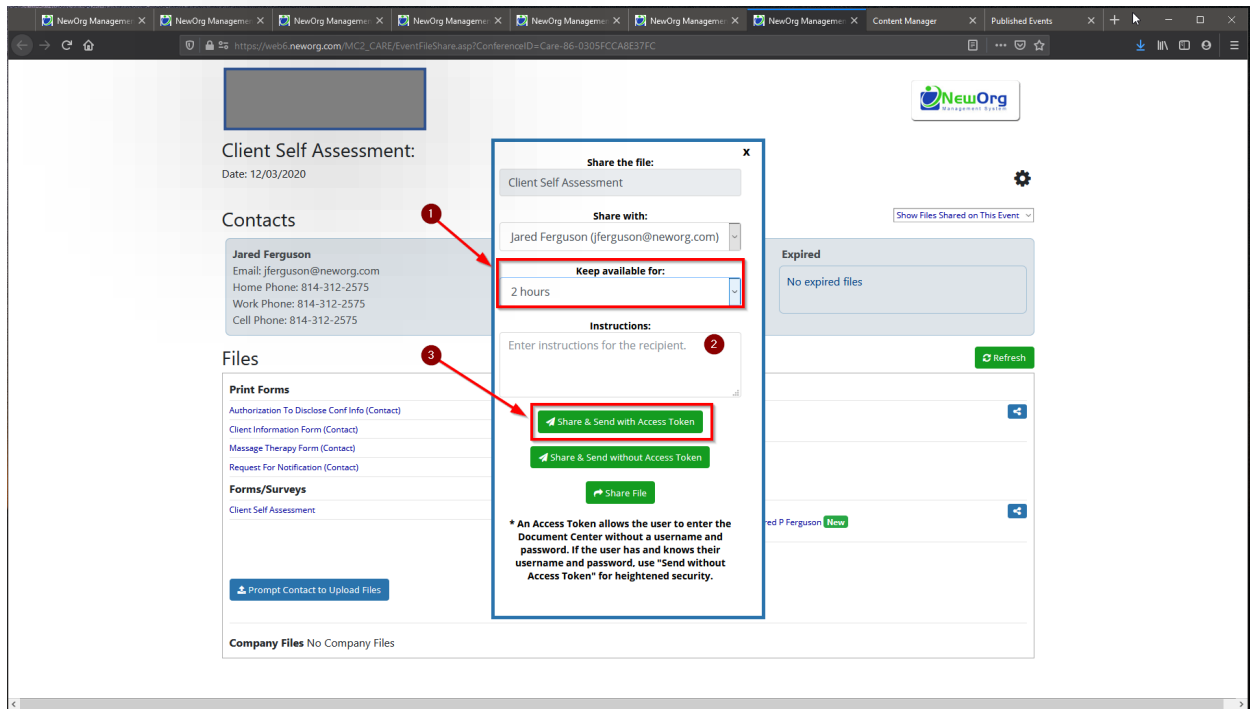
Saved Print Forms
Request For Notification Jared Ferguson (Contact) (11/13/2020 4:30:28 PM)
Authorization To Disclose Conf Info Jared Ferguson (Contact) (12/3/2020 5:06:11 PM)

Forms/Surveys
Client Self Assessment
NewOrg Management System: Jared P Ferguson (12/3/2020 4:54:54 PM)

The screenshot displays the NewOrg Management System interface for a Client Self Assessment. The page includes the following sections:

- Client Self Assessment:** Date: 12/03/2020, Time: 1:00 PM-2:00 PM.
- Contacts:** Jared Ferguson (Email: jferguson@neworg.com, Home Phone: 814-312-2575, Work Phone: 814-312-2575, Cell Phone: 814-312-2575).
- Shared Files:** Client Self Assessment (Shared until Dec 3 2020 6:22PM) and Authorization To Disclose Conf Info (Shared until Dec 3 2020 6:37PM).
- Expired:** No expired files.
- Files:** A list of forms and surveys with a 'Refresh' button. The 'Forms/Surveys' section includes 'Client Self Assessment' with a 'Share' icon highlighted by a red circle and arrow.
- Print Forms:** Authorization To Disclose Conf Info (Contact), Client Information Form (Contact), Massage Therapy Form (Contact), Request For Notification (Contact).
- Saved Print Forms:** Request For Notification Jared Ferguson (Contact) (11/15/2020 4:30:28 PM).
- Saved Forms/Surveys:** Client Self Assessment NewOrg Management System: Jared P Ferguson (12/3/2020 4:14:34 PM).
- Saved Files:** No Files.
- Company Files:** No Company Files.

- 1) Click the 'Share' icon next to the 'Survey/Form' you wish to share.



Note: If more than once contact in the 'Event', the 'Share With' dropdown will display each contact records name.

- 1) Enter the duration for which you wish the file to be available for the client.
- 2) Enter instructions for the client about the form/file.
- 3) Click 'Share & Send with Access Token'

Note: This will send an email to the client directly with a secure link to access the file using a Token.

Sharing A Print Form

Note: Sharing a Print Form via the File Sharing –

The screenshot displays the NewOrg Client Self Assessment interface. At the top, it shows the title "Client Self Assessment:" with the date "Date: 12/03/2020" and the time "Time: 1:00 PM-2:00 PM". The NewOrg logo is in the top right corner. Below the title, there is a "Contacts" section for Jared Ferguson, including his email, home phone, work phone, and cell phone. To the right of the contact information are sections for "Shared Files" (showing "Client Self Assessment" shared on Dec 3, 2020) and "Expired" (showing "No expired files").

The main section is titled "Files" and contains several sub-sections:

- Print Forms:** A list of forms including "Authorization To Disclose Conf Info (Contact)", "Client Information Form (Contact)", "Message Therapy Form (Contact)", and "Request For Notification (Contact)". Each item has a share icon (a square with a right-pointing arrow) to its right. A red circle with the number "1" and a red arrow points to the share icon next to "Request For Notification (Contact)".
- Saved Print Forms:** A list of saved forms including "Request For Notification" and "Jared Ferguson (Contact)".
- Saved Forms/Surveys:** A list of saved forms including "Client Self Assessment" and "NewOrg Management System: Jared P Ferguson".
- Saved Files:** A section indicating "No Files".
- Company Files:** A section indicating "No Company Files".

A "Refresh" button is located in the top right of the Files section. A "Prompt Contact to Upload Files" button is located at the bottom left of the Files section.

1) Click the 'Share' icon next to the Print Form

Client Self Assessment:
Date: 12/03/2020

Contacts

Jared Ferguson
Email: jferguson@neworg.com
Home Phone: 814-312-2575
Work Phone: 814-312-2575
Cell Phone: 814-312-2575

Files

Print Forms

- Authorization To Disclose Conf Info (Contact)
- Client Information Form (Contact)
- Message Therapy Form (Contact)
- Request For Notification (Contact)

Forms/Surveys

- Client Self Assessment

[Prompt Contact to Upload Files](#)

Company Files No Company Files

Share the file:
Authorization To Disclose Conf Info

Share with:
Jared Ferguson (jferguson@neworg.com)

Keep available for:
2 hours

Instructions:
Complete The Form At Your Convenience Please

[Share & Send with Access Token](#)

[Share & Send without Access Token](#)

[Share File](#)

*** An Access Token allows the user to enter the Document Center without a username and password. If the user has and knows their username and password, use "Send without Access Token" for heightened security.**

Expired
No expired files

[Refresh](#)

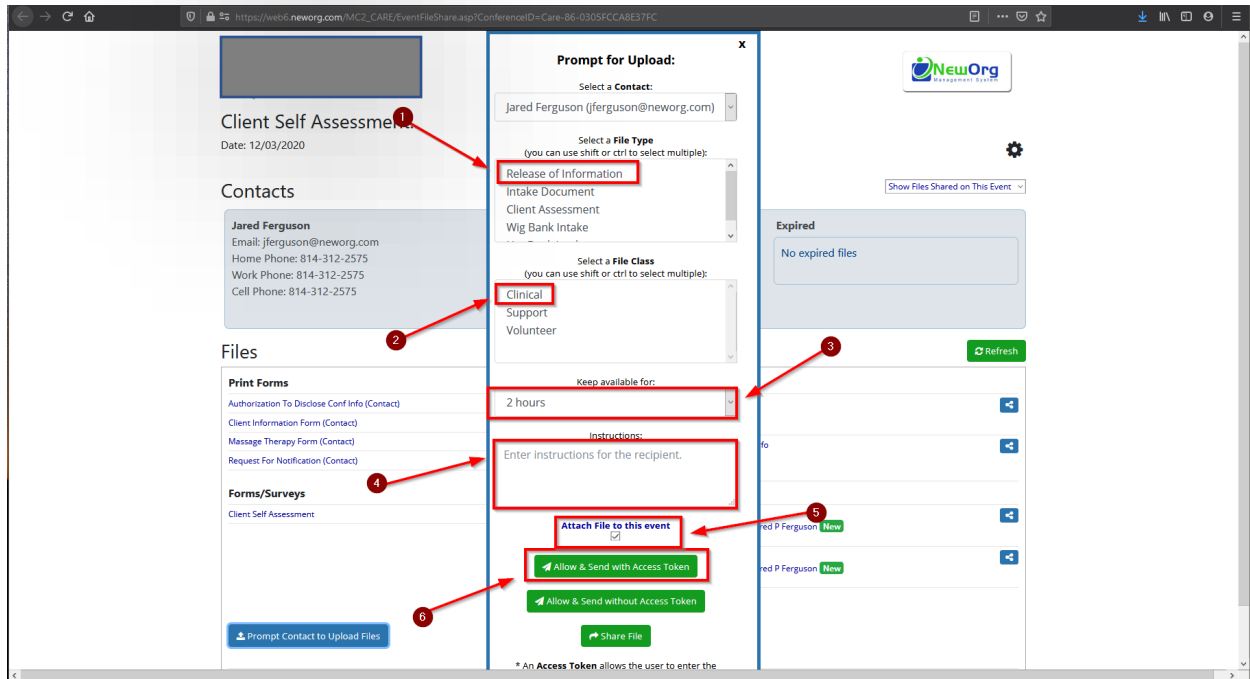
- 1) Enter the details of how long you wish the file to be available, instructions, and click 'Share & Send With Access Token'.

Prompting the Contact To Upload a File

The screenshot displays the 'Client Self Assessment' page in the NewOrg Management System. The page header includes the NewOrg logo and a settings gear icon. The main content area is divided into several sections:

- Client Self Assessment:** Date: 12/03/2020, Time: 1:00 PM-2:00 PM.
- Contacts:** Jared Ferguson, Email: jferguson@neworg.com, Home Phone: 814-312-2575, Work Phone: 814-312-2575, Cell Phone: 814-312-2575.
- Shared Files:** Two files are listed: 'Client Self Assessment' (shared 12/3/2020 6:22PM) and 'Authorization To Disclose Conf Info' (shared 12/3/2020 6:37PM). Both have 'Copy Link' buttons.
- Expired:** No expired files.
- Files:** A list of forms and surveys, including 'Print Forms', 'Forms/Surveys', 'Saved Print Forms', 'Saved Forms/Surveys', and 'Saved Files'. A red box highlights the 'Prompt Contact to Upload Files' button at the bottom left of the Files section, with a red arrow and the number 1 pointing to it.

- 1) Within the 'File Sharing' display, click 'Prompt Contact to Upload Files'.



- 1) Specify which 'File Type' should be uploaded.
- 2) Specify which 'File Class' should be uploaded.
- 3) Select your Duration for how long the contact has availability to upload.
- 4) Enter instructions for the recipient regarding the file upload.
- 5) Keep the 'Attach File to this Event' checked if you wish for the file to be uploaded to the 'Files' tab of the event. Uncheck the checkbox if you wish for the file to be uploaded to the 'Files' tab of the 'Contact View'.
- 6) Click 'Allow & Send with Access Token'.

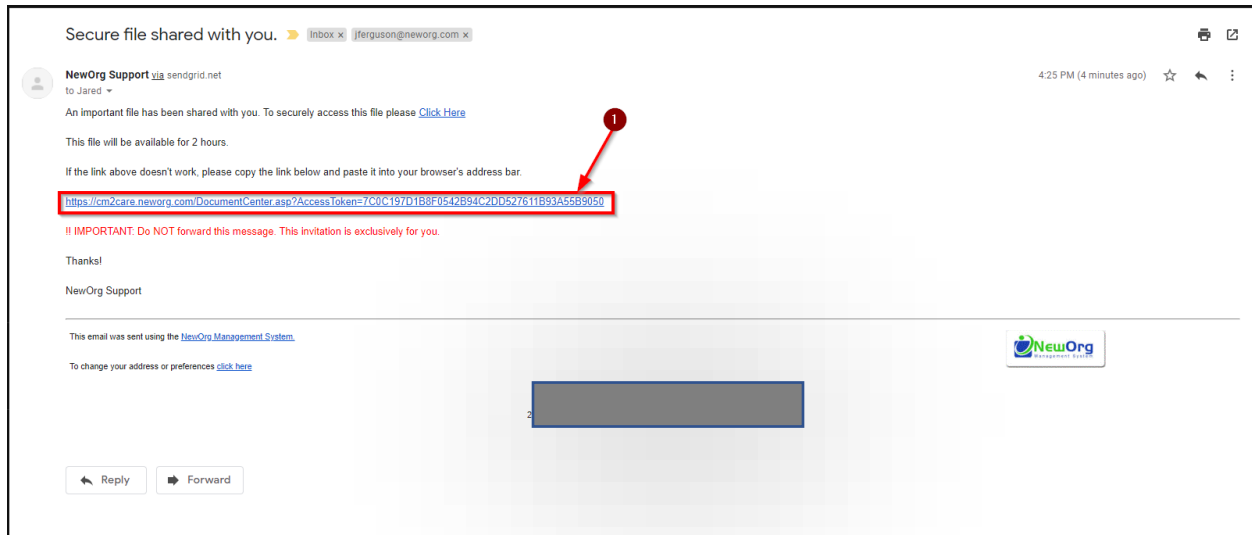
Sharing Company Files

Note: Files uploaded to the 'Files' tab of the system will be available for sharing.

The screenshot shows the NewOrg system interface. At the top, there are several browser tabs and a URL: https://web.neworg.com/MC2_CARE/EventFileShare.asp?ConferenceID=Care-96-0305FCCABE37FC. The main content area is divided into sections for contact information, shared files, and a 'Files' tab. The contact information for Nick Rowan Test is visible. The 'Files' tab is active, showing a list of files categorized into Print Forms, Forms/Surveys, Saved Print Forms, Saved Forms/Surveys, and Saved Files. A red box highlights the 'Company Files' section, which contains an 'Organizational' file named 'Test File Upload Document.txt'. A red arrow points to the 'Share' icon next to this file. Another red arrow points to a 'Prompt Contact to Upload Files' button.

- 1) Under 'Company Files'
- 2) Click the 'Share' icon next to the company file you wish to send to the contact.

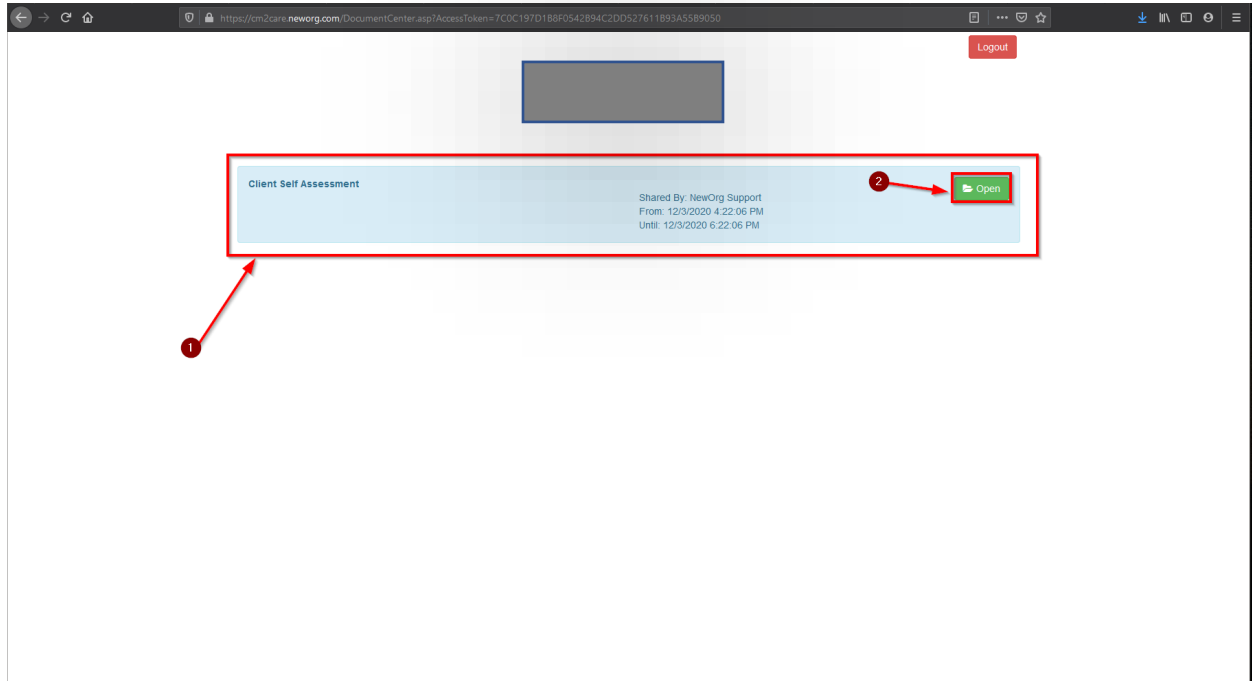
Recipient View and Actions



- 1) The Contact will receive the email in their inbox with a secure link containing the token to access the Document Center.

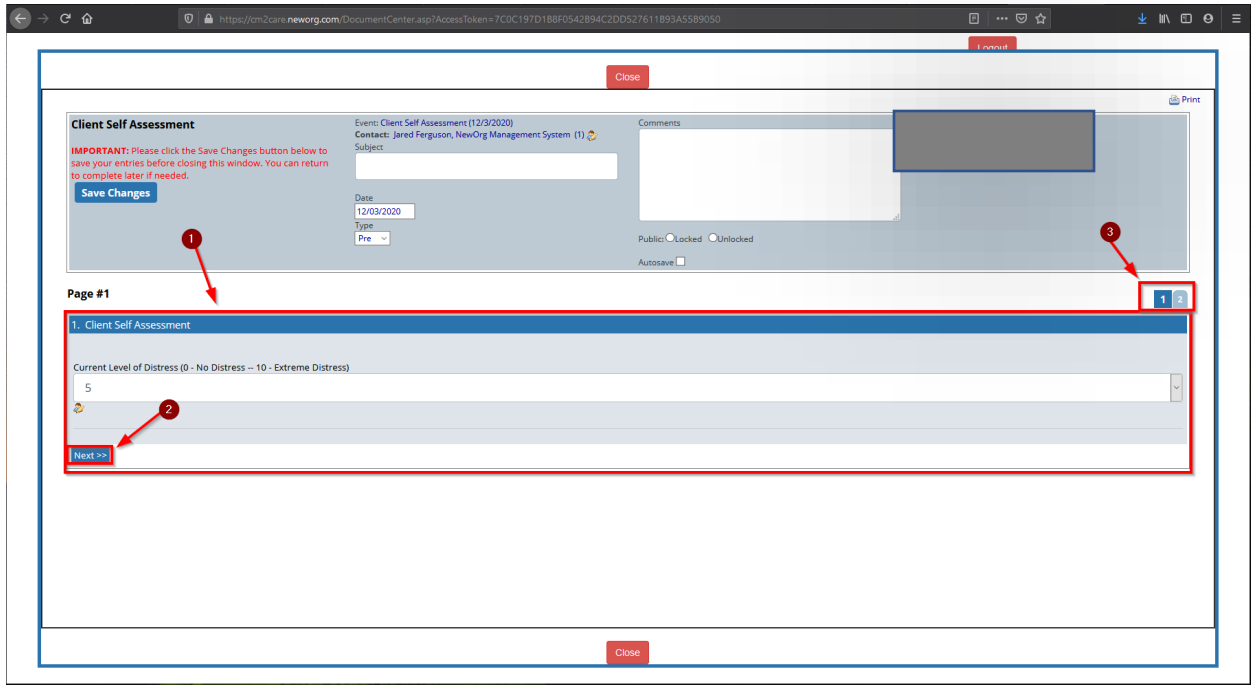
Note: Single Files or Multiple Files will now be displayed in the Document Center.

Requested Survey/Form Completion –

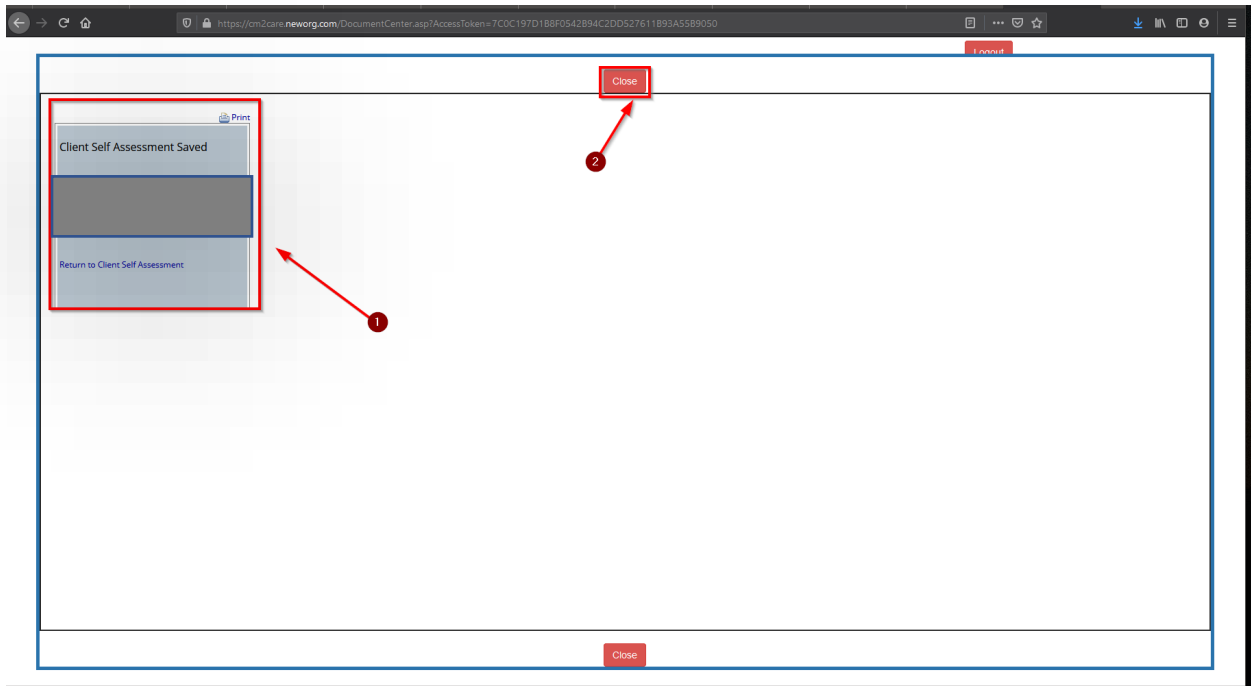


- 1) Click 'Open' to view the 'File' or Form

Note: The instructions will be displayed below the 'File/Form Name'.

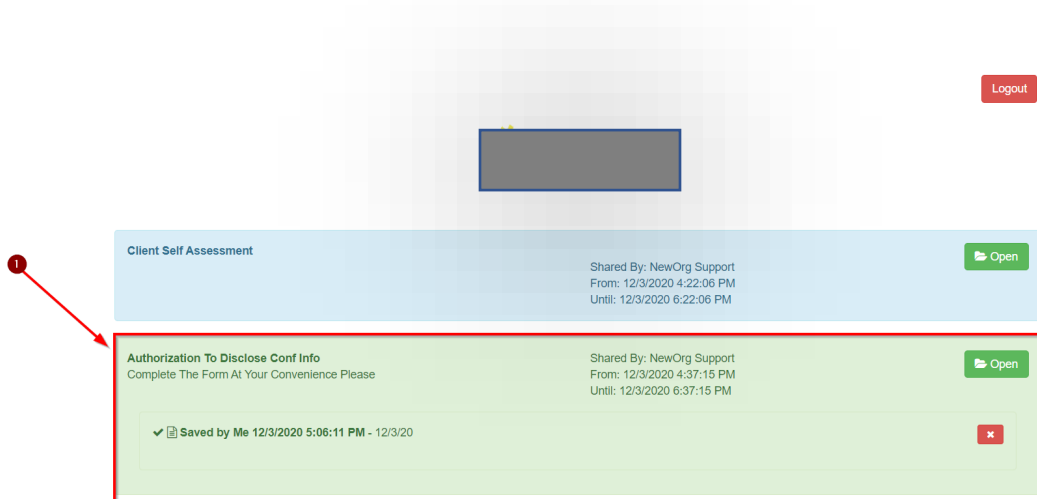


- 1) Answer the questions,
- 2) click 'Next' or the
- 3) 'Page Number' to the right.



- 1) Once the form is completed, view the final details
- 2) Click 'Close' to return to the Document Center.

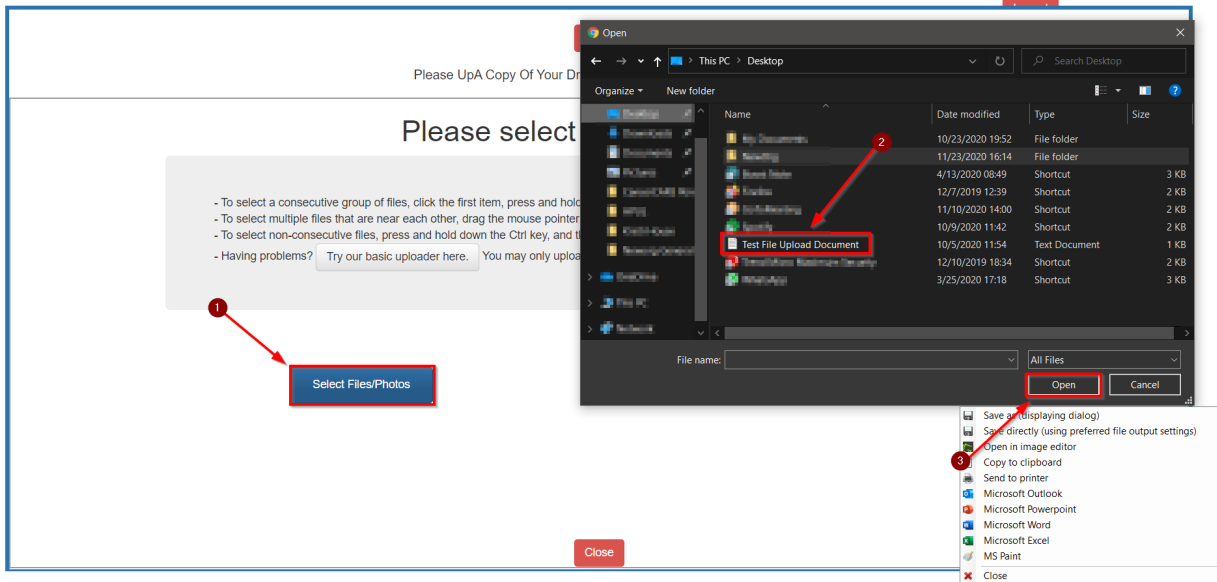
Note: The file will be displayed in Green when it is saved/completed.



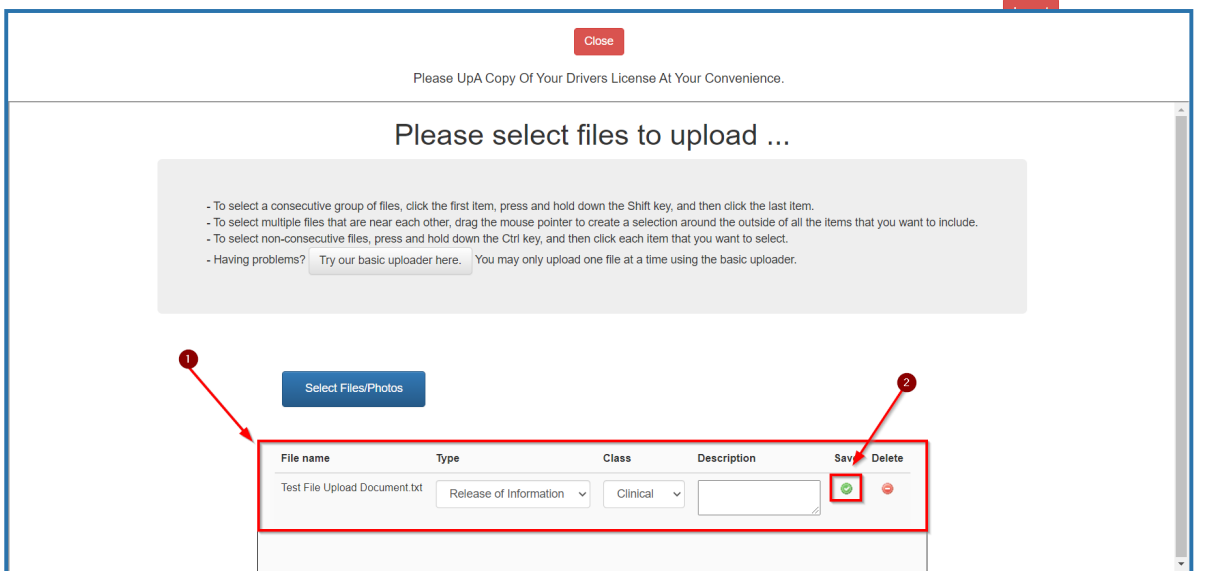
Prompt for File Upload --



-
- 1) The Contact has been prompted to upload a File to their record.
Note: The instructions will be displayed below the 'File/Form Name'.

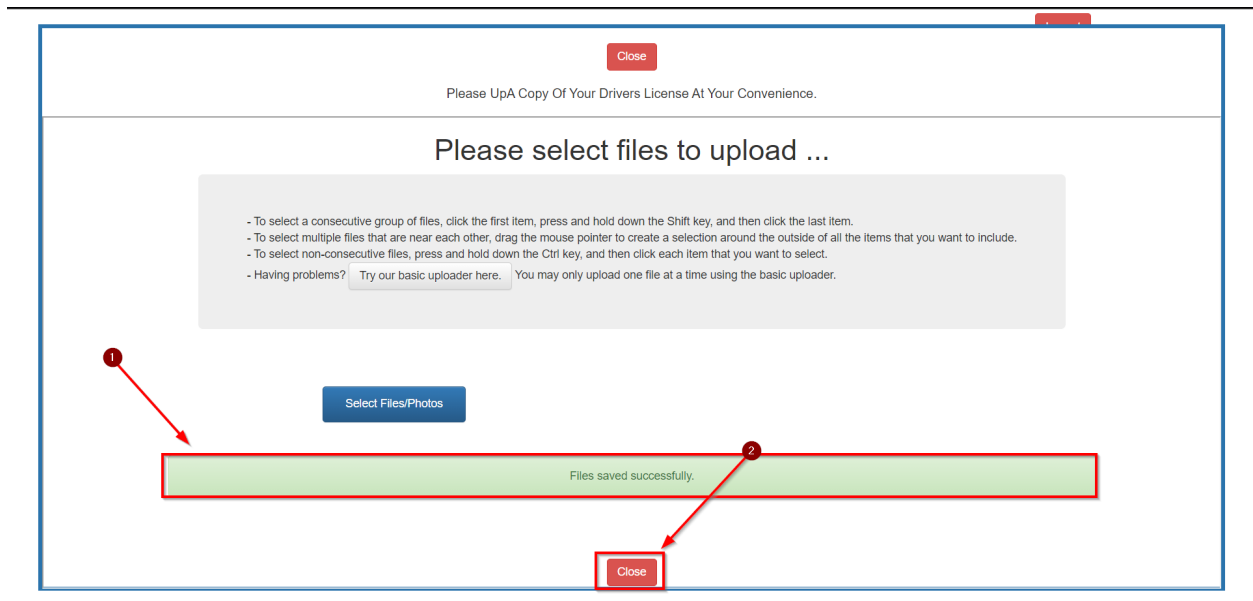


- 1) Click 'Select Files/Photos'
- 2) Select the File from their PC or Device
- 3) Click 'Open'.



- 1) Note the 'File Type' and 'File Class' are preset based on the request from the File Sharing Display.
- 2) Click 'Save' when finalized.

12/4/20



- 1) Note the File Was Uploaded successfully
- 2) Click the 'Close' button once finalized.

Print Forms –



1) The recipient will be requested to click 'Open' next to the file they wish to view/complete.

Note: The instructions will be displayed below the 'File/Form Name'.

Complete The Form At Your Convenience Please

[Save a Copy to File](#)

Authorization to Disclose Confidential Information

I hereby authorize Cancer CAREpoint to contact the individuals below to obtain information about my health status.

Family member(s) or Contact person(s):

Name: _____

Phone #: _____

Email: _____

Family member(s) or Contact person(s):

Name: _____

Phone #: _____

Email: _____

Information received from the above individual(s) may be disclosed to the following individuals:

Name(s) of person(s) or group(s): _____

- 1) The recipient is requested to complete the documentation.
- 2) Scroll down the form.

Complete The Form At Your Convenience Please

Name(s) of persons or groups:

Name: _____

Phone #: _____

Email: _____

The following information is authorized to be disclosed (check all that apply):

Health information pertaining to my current condition (e.g. I have been unable to attend sessions at Cancer CAREpoint due to complications from my cancer.)

End of life issues: hospice, death, funeral arrangements, and any situations/services that my friends from Cancer CAREpoint groups are welcome to visit or to attend.

My rights:

I may refuse to sign this form. My refusal will not affect my ability to receive services at Cancer CAREpoint.

I may revoke this authorization at any time and can do so verbally or in writing to Cancer CAREpoint. My revocation shall take effect upon receipt.

Signature:

Printed Name: _____

Signature: _____

[Click here to print](#)

Date: _____

I have received a copy of this form

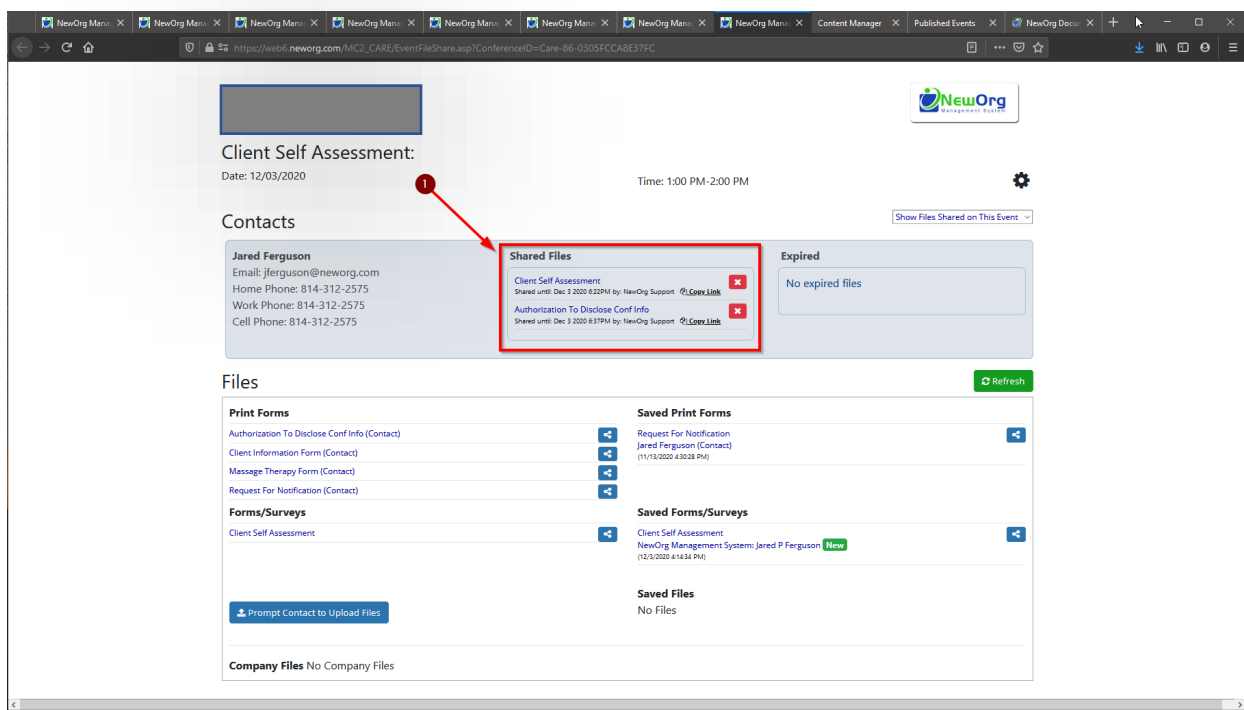
[Save a Copy to File](#)

[Close](#)

- 1) Once finalized with entry, click 'Save a Copy to File'
- 2) Once Completed, click 'Close'.

Viewing Previously Shared Files

Note: Previous Shared Files will be displayed in the 'Shared Files' area –



Viewing Expired Files

The screenshot displays a web application interface for viewing expired files. At the top, there is a header for 'Client Self Assessment' with a date of 12/03/2020 and a time range of 1:00 PM-2:00 PM. Below this, there are sections for 'Contacts' and 'Files'. The 'Contacts' section lists two individuals: Jared Ferguson and Nick Rowan Test. Under Jared Ferguson's contact information, there are three sub-sections: 'Shared Files', 'Expired', and 'Expired'. The 'Expired' section is highlighted with a red box and contains three items, each with a share icon: 'File Upload Requested', 'Client Self Assessment', and 'Authorization To Disclose Conf Info'. A red arrow points to the 'Expired' header. The 'Files' section at the bottom is divided into 'Print Forms', 'Saved Print Forms', and 'Forms/Surveys', each with a list of items and share icons. A 'Refresh' button is located in the top right of the 'Files' section.

- 1) Files that have been shared and have expired based on the 'Keep Available For' will be displayed under 'Expired'.

Resharing a Previously Saved File

The screenshot shows a web application interface with the following sections:

- Contacts:**
 - Jared Ferguson:** Email: jferguson@neworg.com, Home Phone: 814-312-2575, Work Phone: 814-312-2575, Cell Phone: 814-312-2575. Includes 'Shared Files' (Client Self Assessment) and 'Expired' files.
 - Nick Rowan Test:** Email: jaredpaulferguson1989@gmail.com. Includes 'Shared Files' (No shared files) and 'Expired' files (No expired files).
- Files:**
 - Print Forms:** Authorization To Disclose Conf Info (Contact), Client Information Form (Contact), Message Therapy Form (Contact), Request For Notification (Contact).
 - Forms/Surveys:** Client Self Assessment.
 - Saved Print Forms:** Request For Notification (Jared Ferguson (Contact)), Authorization To Disclose Conf Info (Jared Ferguson (Contact)).
 - Saved Forms/Surveys:** Client Self Assessment (NewOrg Management System: Jared P Ferguson).
 - Saved Files:** Test File Upload Document.txt (Jared Ferguson).

Red annotations in the image include:

- A red circle with the number '1' pointing to the 'Refresh' button in the Files section.
- A red box surrounding the 'Saved Print Forms', 'Saved Forms/Surveys', and 'Saved Files' sections.
- Red circles with the number '2' pointing to the 'Share' icons (blue squares with a right-pointing arrow) next to the files in the highlighted sections.

- 1) In the 'Saved Print Forms', 'Saved Forms/Surveys', and 'Saved Files' area.
- 2) Click the 'Share' icon next to the file you wish to share again with the contact.

Copying The Link For a Previously Shared File

Note: If you choose to send the secure File Share via another communication Tool, you can click 'Copy Link' to paste it into whichever tool you wish to utilize.

The screenshot shows a web browser window displaying the NewOrg Management System interface. The page title is "Client Self Assessment" with a date of 12/03/2020 and a time of 1:00 PM-2:00 PM. The interface includes a "Contacts" section for Jared Ferguson, a "Shared Files" section with two files, and a "Files" section with various forms and surveys. Red arrows and numbers 1 and 2 highlight the "Copy Link" buttons in the "Shared Files" section.

Contacts

Jared Ferguson
Email: jferguson@neworg.com
Home Phone: 814-312-2575
Work Phone: 814-312-2575
Cell Phone: 814-312-2575

Shared Files

- Client Self Assessment
Shared until Dec 3 2020 6:22PM by: NewOrg Support [Copy Link](#)
- Authorization To Disclose Conf Info
Shared until Dec 3 2020 6:37PM by: NewOrg Support [Copy Link](#)

Expired

No expired files

Files

Print Forms

- Authorization To Disclose Conf Info (Contact)
- Client Information Form (Contact)
- Message Therapy Form (Contact)
- Request For Notification (Contact)

Forms/Surveys

- Client Self Assessment

Saved Print Forms

- Request For Notification
Jared Ferguson (Contact)
(11/13/2020 4:30:28 PM)

Saved Forms/Surveys

- Client Self Assessment
NewOrg Management System: Jared P Ferguson **New**
(12/3/2020 4:14:34 PM)

Saved Files

No Files

Company Files No Company Files

1) Click 'Copy Link' and paste the link

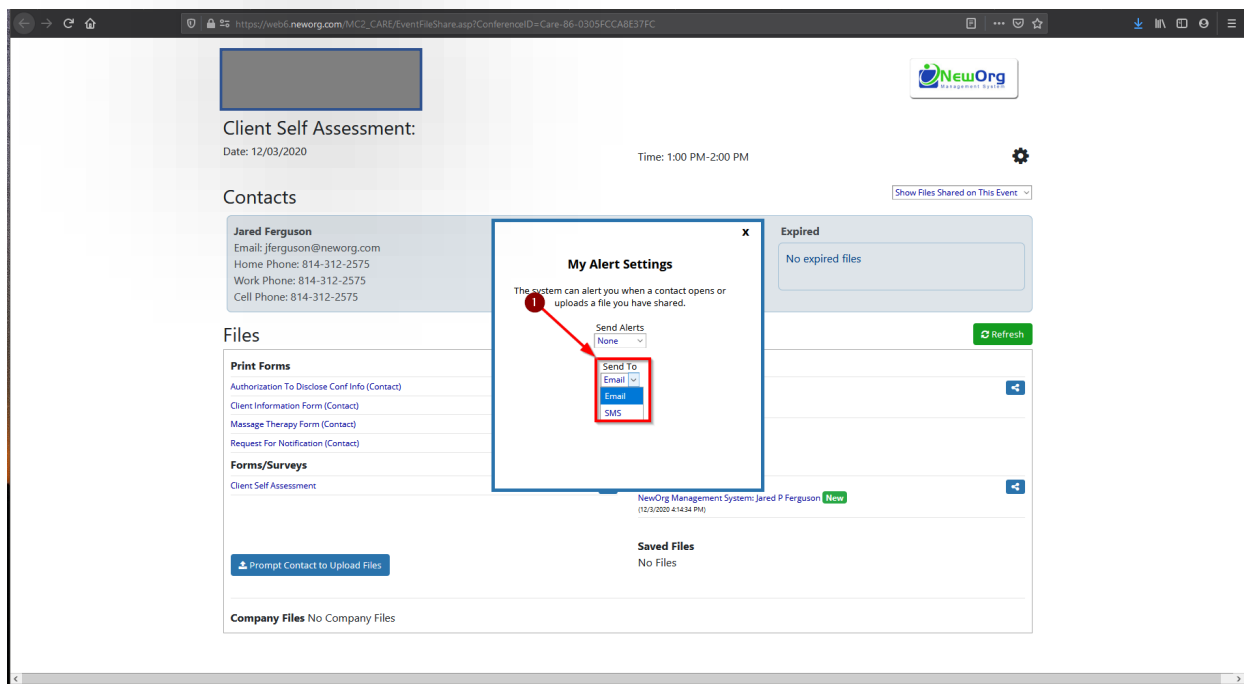
Specifying Your Alert Settings and Alert Notification Method

Note: Within the File Sharing display, you can specify if you wish to receive alerts based on contacts opening or uploading files in the Document Center.

The screenshot shows the NewOrg Management System interface. A modal window titled "My Alert Settings" is open, displaying a "Send Alerts" dropdown menu. The dropdown menu is open, showing options: None, All, 24 hours, 10 hours, 5 hours, 2 hours, and 1 hour. A red box highlights the dropdown menu, and a red arrow points to it with the number "2". Another red arrow points to a gear icon in the top right corner of the main display with the number "1".

- 2) Click the 'Gear' icon on the top right of the display
- 3) Specify the timeline for which you wish to receive an alert, be it All, once per 24 hours, once per 10 hours, once per 5 hours etc.

Note: You can also specify whether you not you wish to receive these alerts via Email or SMS. Both contact details are located within the 'Staff' details.



1) Select either 'Email' or 'SMS' as your preferred alert communication method.



1) If choosing the 'Email' alert method, you will receive an email with the Contact # and information that a document has been opened/saved/uploaded in the Document Center. This email also includes a link to the open the Event File Share display.

12/4/20