



Office for People With Developmental Disabilities

CHOICES User Profile User Guide

User Profile

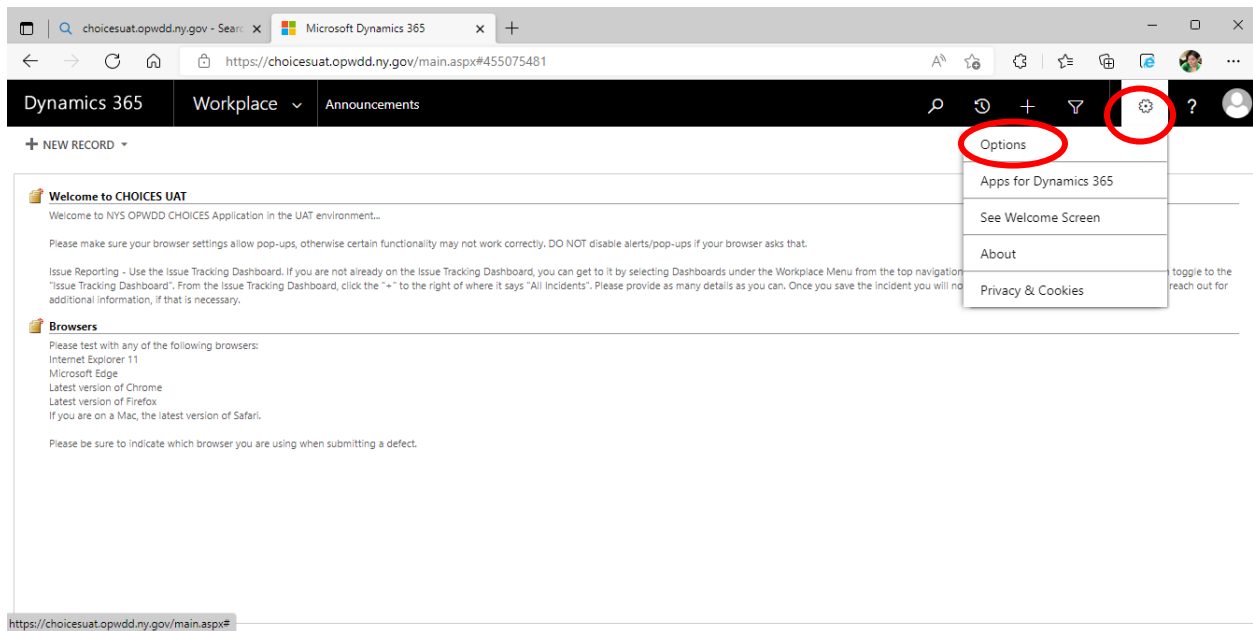
(The personal information and accompanying data shown in this guide are fictional and are used for illustrative purposes only.)

This guide will show the user how to view their User Profile. In the User Profile, you can keep your email address and phone number updated, view your Role (Security Role) and Business Unit in the CHOICES Application.

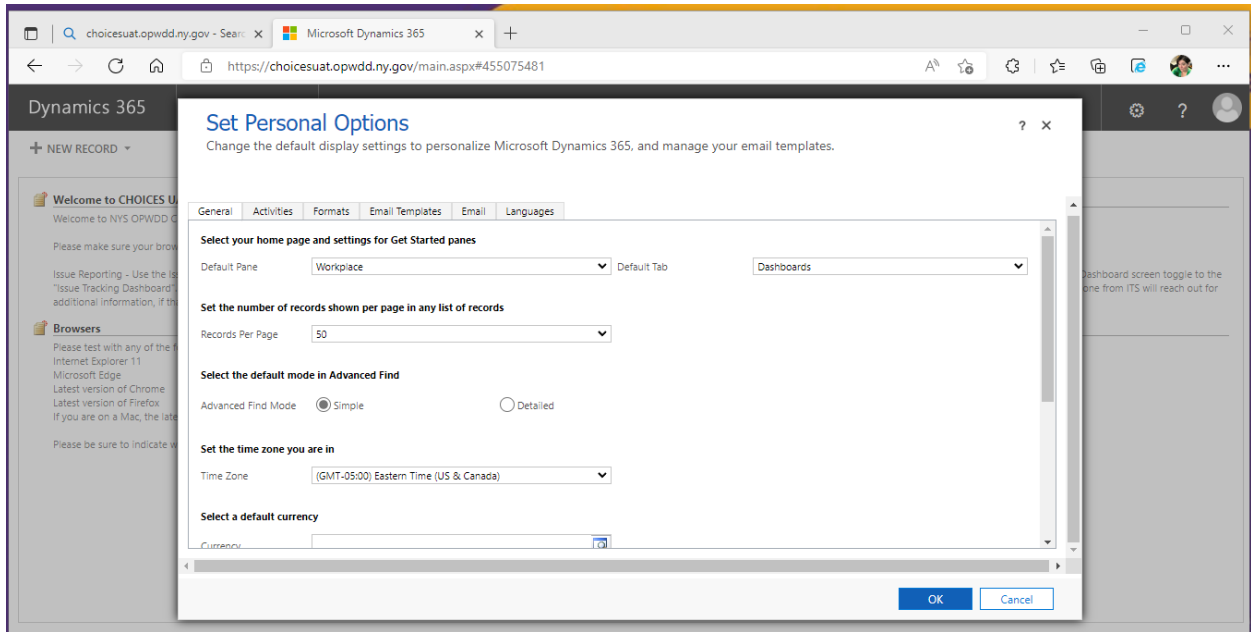
User Profile

From the main CHOICES Screen, click the **Setting** icon which is located at top right-hand corner.

Then select **Options**.



The **Set Personal Options** screen displays.



Scroll down to the bottom of the **Set Personal Options** screen. There is a sentence that says, “View your user information.” Click the words **user information** to open your User Profile.

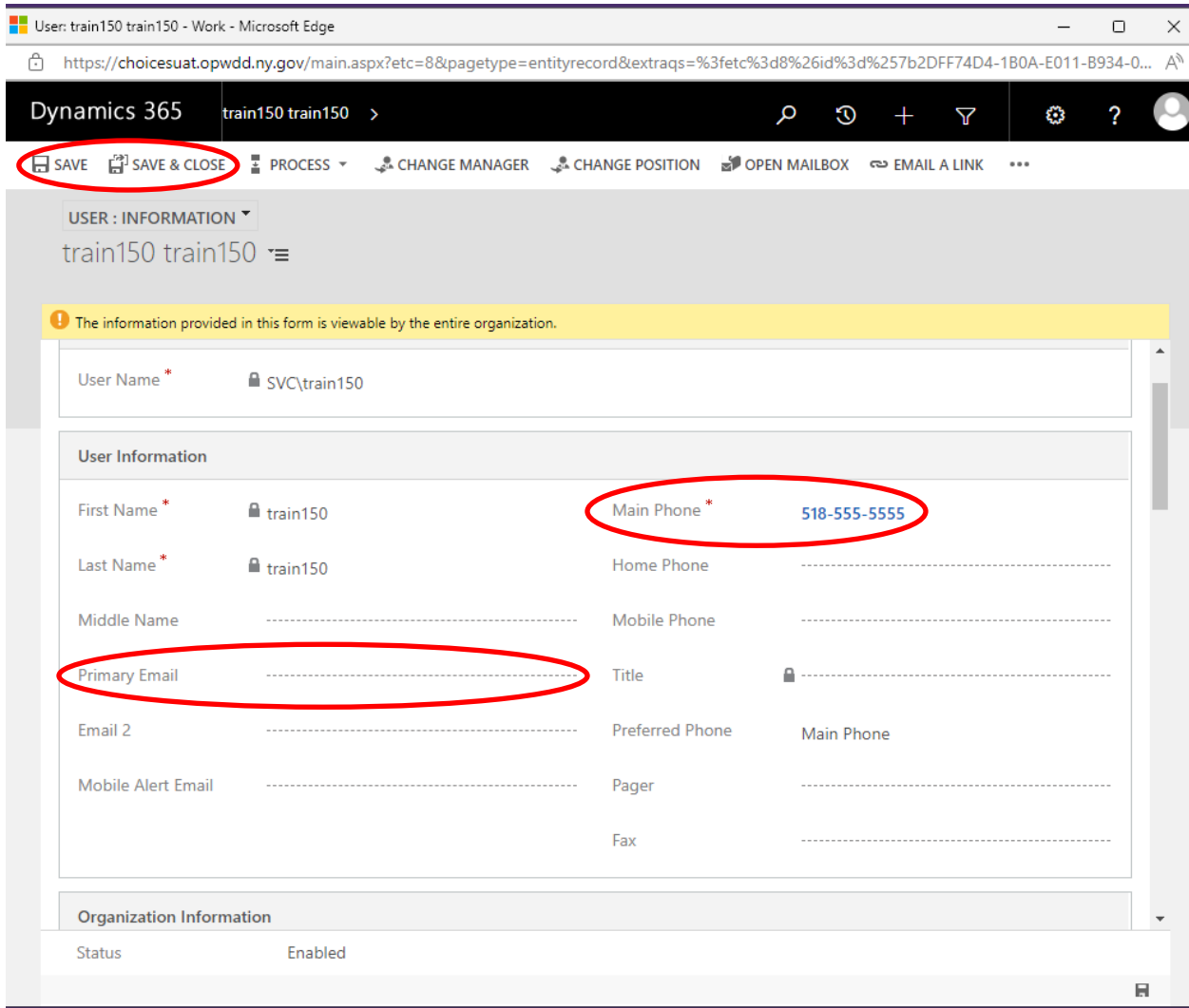


Your User Profile Displays.

To update information, simply click inside a field that does not have a lock symbol next to it and type the updated information.



Once you have updated any information click **Save** to save your changes or **Save and Close** to Save your changes and close your **User Profile**.

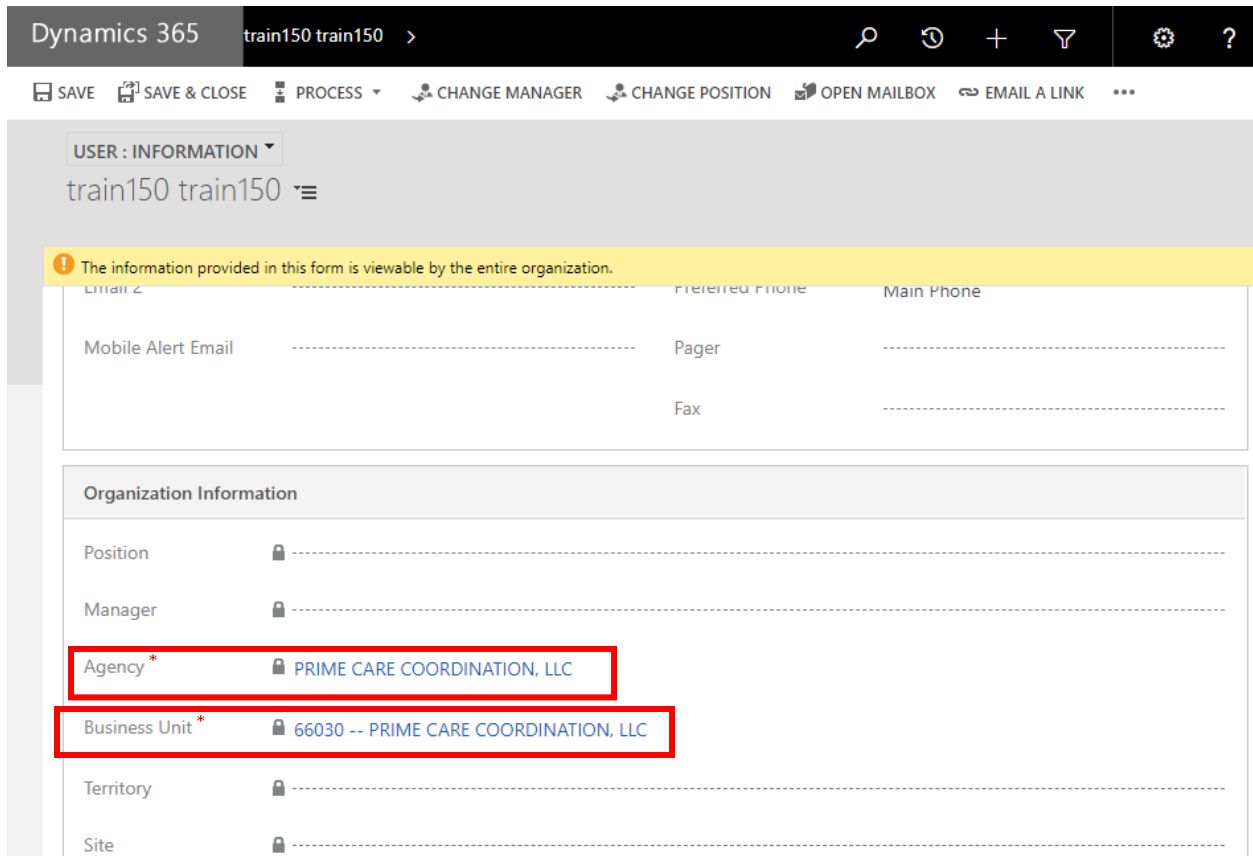


NOTE:

Please be sure that your Phone Number and Primary E-mail address are entered correctly. There is an auto-email process in CHOICES, where you will receive updates about documentation via email.

Business Unit and Agency

In the **Organization Information** section of the **User Profile** you can see what **Business Unit** and **Agency** you are assigned to.

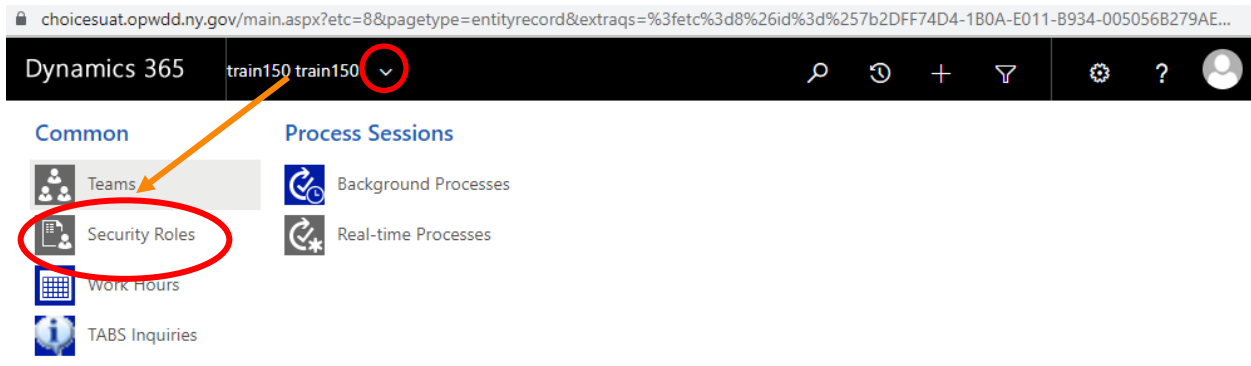


The screenshot shows the Dynamics 365 interface for a user profile. The top navigation bar includes 'Dynamics 365' and the user name 'train150 train150'. Below the navigation bar is a toolbar with buttons for 'SAVE', 'SAVE & CLOSE', 'PROCESS', 'CHANGE MANAGER', 'CHANGE POSITION', 'OPEN MAILBOX', and 'EMAIL A LINK'. The main content area is titled 'USER : INFORMATION' and 'train150 train150'. A yellow warning banner states: 'The information provided in this form is viewable by the entire organization.' Below this is a form with several fields. The 'Organization Information' section is highlighted with a red box and contains the following fields:

Field	Value
Position	-----
Manager	-----
Agency *	PRIME CARE COORDINATION, LLC
Business Unit *	66030 -- PRIME CARE COORDINATION, LLC
Territory	-----
Site	-----

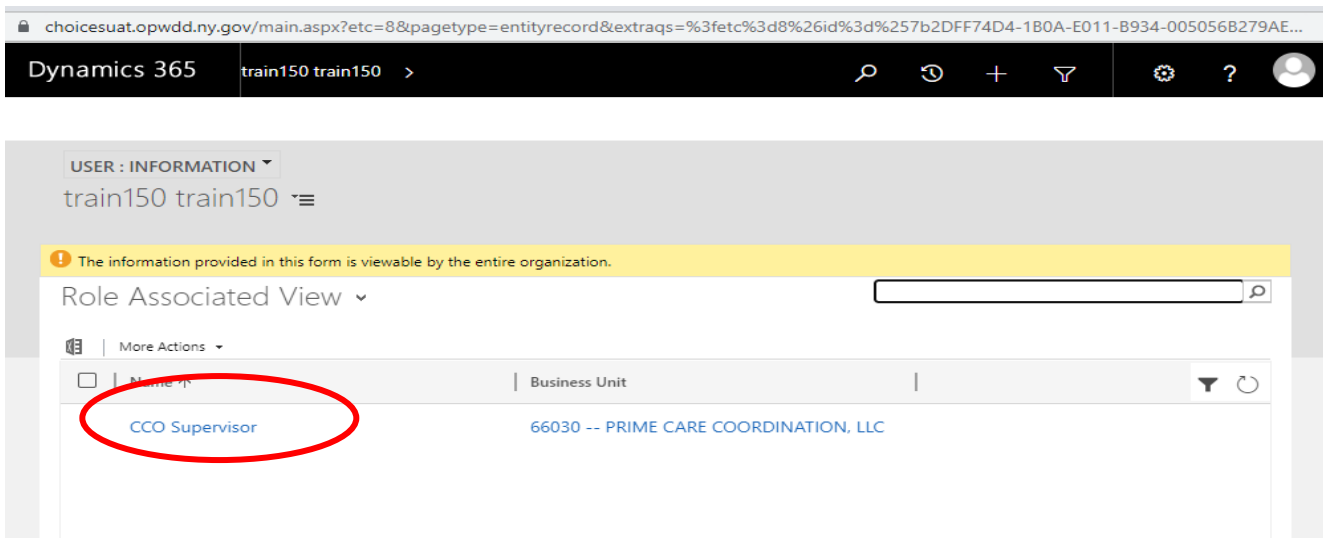
Roles

To view what role is assigned, click on the arrow next to the user name. The sub-sections will display, click the **Security Roles** tile.



The screenshot shows the Dynamics 365 user interface. At the top, the user name 'train150 train150' is displayed with a dropdown arrow. Below the navigation pane, the 'Common' section contains several tiles: 'Teams', 'Security Roles', 'Work Hours', and 'TABS Inquiries'. The 'Security Roles' tile is circled in red, and an orange arrow points to it from the dropdown arrow above. The 'Process Sessions' section contains 'Background Processes' and 'Real-time Processes'.

Your Role is listed under the Name column; your Business Unit also displays.




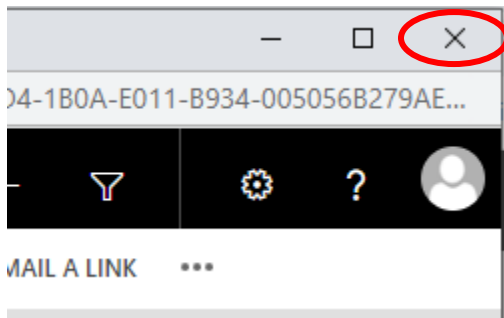
The screenshot shows the 'Role Associated View' in Dynamics 365. The user is logged in as 'train150 train150'. A yellow banner at the top states: 'The information provided in this form is viewable by the entire organization.' Below this, there is a search bar and a 'More Actions' dropdown. The main content is a table with the following data:

Name	Business Unit
CCO Supervisor	66030 -- PRIME CARE COORDINATION, LLC

The 'CCO Supervisor' role name in the table is circled in red.

Exit User Profile

To close out of the **User Profile**, click the X in the right hand corner  to exit.



From the **Set Personal Options** page, click **OK** or **Cancel**.

